You’ve done your research. You know that you want to go with an outsourced DaaS solution. You’ve even identified your top service provider candidates. Now it’s time to take your research and information gathering to the next level.

This template serves as a guide for creating a comprehensive request for proposal or request for information for assessing desktop as a service providers.
Defining project scope and accurately assessing potential solutions is a critical part of any vendor selection process. Requests for Proposals (RFP) and Requests for Information (RFI) are common ways to gather the required information and judge the merits and fit of potential vendors.

Outsourced Desktop as a Service (Daas) is a new and growing cloud solution that many organizations are exploring for the first time. This means that some decision makers are seeking help defining their project and adequately vetting potential service providers. Choosing the right DaaS provider is critical to a successful virtual desktop and end user computing initiative as having the right combination of infrastructure, services and support can make or break the project.

This RFP Template serves as a generalized sample of questions commonly found in DaaS RFPs. Use it as a guide when creating your own document, or request an editable Word version of this template that you can customize to your unique project needs.
COMPANY INFORMATION

Purpose of Solicitation

Detail why you are seeking requests for proposals for a virtual desktop and/or end user computing solutions.

Company Background

Include a high level summary of your company.

Key Data Points:
- Headquarters location
- Number of employees
- Other helpful information

Key Dates and Activities

Include key deadlines such as:
- Intent to participate
- Questions regarding RFP
- RFP submission
- Target decision date
- Desired implementation time frame

Submission Guidelines

Include instruction on how to submit RFP responses and expectations.

Include any legal language regarding review and selection process if desired.

Current Environment

Provider overview of the current environment that this solution will be replacing or fitting into.

Projected Future State

Provide an overview of where the company is going if anticipated plans will effect this project.

Summary of Requirements

Bullet points that summarize what you expect from a solution and solution provider.
VENDOR RESPONSES

1. Organizational Qualification
   1.1. Background and history
   1.2. Office location(s)
   1.3. Number of employees and average employee tenure
   1.4. The year the company was founded and the number of years providing virtual desktop services
   1.5. Detail the financial structure of your organization
   1.6. Number of customers and average size of customer organizations
   1.7. Do you have customers within our industry? Please provide details
   1.8. Technology partners

2. Requirements Fit
   2.1. Desktop Environment: Desktop as a Service
      2.1.1. Desktop configuration options
             *Standard configuration options and delivery methods (persistent and/or non-persistent desktops) offered.*
      2.1.2. Support options for multiple roles/personas/locations
      2.1.3. Application packaging and acceleration for primary applications
             *(Services available)*
      2.1.4. Endpoint support options
             *Ask questions regarding the specific endpoint support you need, such as:*
             - Thin client
             - PC
             - Mac
             - Mobile
             - Zero-configuration rollouts
             *If necessary, divide this into multiple questions*
2.1.5. AD integration

2.1.6. OS & application support
   Include questions about support for specific operating system or applications, such as:
   • Office 365
   • Windows 7, 10, etc.

2.1.7. Patching responsibilities and procedures

2.1.8. Anti-virus included

2.2. Desktop Environment: Virtual Desktop Infrastructure

2.2.1. Describe the underlying infrastructure of your solution

2.2.2. Delivery methods available
   I.E. Cloud, on premise, hybrid

2.2.3. Deployment location options
   Location of available data centers (if not opting for on premise delivery)

2.2.4. Maintenance windows and change management integration process

2.2.5. Application packaging and acceleration for primary applications
   (Infrastructure details)

2.2.6. Managed endpoint options
   (Infrastructure details)

2.3. Consumables

2.3.1. Compatibility with existing consumables, including:
   List any and all existing consumables you require compatibility with

2.3.2. Re-use ability for existing hardware/terminals
   If you have endpoint devices or any other hardware you would like to reuse, ask specifically about compatibility.

2.3.3. Monitors, keyboards, mouse and cables

2.3.4. Local and networked printer configuration and redirection
3. Additional Services and Capabilities

3.1. Support for Single Sign On

3.2. Disaster recovery option

3.3. PCI compliance capabilities

3.3.1. List level of certification

3.3.2. Provide responsibilities matrix

3.4. HIPAA compliance capabilities

3.4.1. Provide responsibilities matrix

3.4.2. Provide a copy of your Business Associate Agreement (BAA)

3.5. Ability to increase/scale support for acquisition, integration and special project that should not impact ongoing support agreement

3.6. How many monitors can be supported per end user

3.7. Endpoint validation

3.8. Virtual storage options and/or compatibility

4. Solution

4.1. How mature is the proposed offering? Describe the experience, competence and completeness of the proposed solution, including delivery and operations.

4.2. If you plan to use other technology partners to deliver a complete solution, how do you ensure that you are fully aligned and scope boundaries are clear? How do you ensure clear accountability while providing a single point of contact?

4.3. Describe your proposed team’s experience with virtualization and hypervisor technologies, Desktop-as-a-Service/VDI technologies.

4.4. Describe your asset & configuration management.

4.5. What type, format and frequency is available for SLA reporting?
4.6. Describe your business and technology support methodology and program governance methodology.

4.7. What monitoring tools do you use and what dashboards are available?

4.8. What is your vision for the future? Is there a roadmap for the technology offerings in scope?

4.9. Provide a sample RACI/responsibilities matrix.

4.10. Provide a network diagram of your proposed solution and infrastructure.

5. Implementation

5.1. What type of timeline do you recommend for the proposed project?

5.2. Specific implementation approach (i.e., forklift, phased by function, phased by user community, etc.)

5.3. Accurate IT asset inventory that is reviewed/updated regularly

5.4. Advance joint planning to anticipate future needs for capacity, performance, space planning, etc.

5.5. Regular review of error logs, exception tracking, etc.

5.6. Component review for DR/failover capability

5.7. What is the process for introducing change into:

5.7.1. A running environment

5.7.2. An environment while delivery is in flight

5.7.3. A contract while negotiating

5.7.4. A contract prior to expiration
6. Support

6.1. Outline the proposed account team, including sales, service delivery, operations and business development. How can they be contacted?

6.2. What is your approach to customer relationship management?

6.3. How mature are your service management processes?

6.4. Ticket management process, including response times and escalation process

6.5. SLA reporting on ticket volumes, categories, ticket mix, reopened tickets, average response times

6.6. Incident management processes

6.7. Change management process

6.8. Patch management processes

7. Contract & Billing

7.1. Cost model

7.2. Billing format, frequency and options

7.3. Ability to bill based on location/department

7.4. Contract amendment process

8. Client Responsibilities

8.1. What roles and staffing levels do we need to provide

8.1.1. During implementation

8.1.2. Ongoing

8.2. What is the client mechanism for partnering with you to influence that future roadmap?
9. References & Differentiators

9.1. What are the top 5 critical success factors for a project such as this?

9.2. Name 3 ways in which it is easier to do business with you over your competition?

9.3. List 3 current clients with similar size and complexity of the solution. Please including organizational scope, scope of managed services and number of years you have provided such services.

9.4. Provide contact information for 3 reference clients.

Request an Editable Version of this RFP Template

If you’d like to use or customize this template for your RFP and RFI needs, you can request a complimentary editable Word version.
ABOUT DIZZION

Established in 2011, Dizzion, Inc. is a global provider of end-user computing services, including cloud-delivered Desktops as a Service (DaaS), paired with complementary offerings like secure endpoints, application delivery and storage. The company is delivering the next generation of virtual desktop solutions to meet the demands of a remote global workforce in industries with stringent security and compliance needs, including business process outsourcing, financial services, healthcare and insurance. Dizzion’s mission is to enable users to securely access applications and data from any device, anywhere increasing mobility and productivity. To learn more about Dizzion, visit www.dizzion.com.

LEARN MORE ABOUT DIZZION’S FULL SUITE OF EUC SERVICES.