Managed Print Services
Sample RFP

INTRODUCTION

1. **Introduction**
   [brief overview of the company, how long in business, what it does, rough number of employees]
2. **Purpose of RFP**
   [Company Name] is seeking to consolidate desktop printer support and maintenance, supply consumables, and asset inventory control for all of our networked and non-networked printers by one qualified vendor. We are looking to partner with a company regarded in this market as a leader in its field. Copiers, dot-matrix, and label printers are out of scope of this proposal. [modify as necessary]

   Our goals are [summarize your goals, they may be different]:
   - Lower administrative costs
   - Lower maintenance costs
   - Lower costs of operation
   - Obtain fleet management
   - Optimize the fleet for today and the future

   In order for the vendor to have a better understanding of your total printing environment, it is important to also discuss the current challenges you face, whether they are caused by internal systems and procedures or by the incumbent service company's failures.
3. **Business Locations**
   [Company Name] has offices in the following locations.
4. **Confidentiality**
   There should always be some statement indicating that both the RFP and the vendor responses are confidential and anything provided by the vendor will be held in strictest confidence, never shared with a competing vendor, and only used by the decision making team within your company.
5. **Submission Deadlines**
   Date and time RFP responses are due. What format, hard copy paper, email, electronic pdf or a combination? Will late submissions be automatically disqualified? What if a vendor fails to answer certain questions, does the failure to provide a COMPLETE response disqualify the potential client?

PROPOSAL FORMAT & CONTENT
Proposals should provide straightforward, concise information that satisfies the requirements of this solicitation and should be presented in the following format:

1. Executive Summary – The Executive Summary should be a high level overview of how the vendor proposes to accomplish the requirements of this RFP. The Executive Summary should demonstrate that the vendor understands the requirements.
2. Company Background Information/ Experience and Qualifications – Vendor must be a reputable company of strong financial standing experienced in Printer Maintenance and

Support Services. Provide information on the vendor's prior experience, include a minimum of 4 current customer references for who the vendor is providing a similar managed print solution.

3. Statement of Work (SOW) Requirements / Questions – Provide information to indicate how the SOW requirements will be satisfied as well as responding to the specific questions.
4. Pricing and Billing – Vendor must submit pricing in a cost per page format, by model. A black or mono rate and a color rate should be proposed for color printers. This cost per page should be complete and include toner, maintenance kits, parts and labor for break fix support, account management, reporting, and training. Do not base the pricing on minimums or maximums. You should only pay for pages printed. The vendor should be capable of working with your invoicing requirements as well.
5. Value Added Services – Vendor should explain other processes and programs the client can take advantage of to improve the workflow or lower the overall costs of printing.

COMPANY BACKGROUND

It is critical that a vendor is selected that has the expertise to truly be the managed print services provider. Selecting a vendor that has that expertise is essential for the success of a managed print program. Be wary of providers who decide to out of the blue to label themselves as MPS Providers. There is much more involved than just the title.

1. **Company Background Information.**
   Vendor shall have been in business for at least 5 years, during which they have been providing Managed Print Services for a minimum of 5 years. How long has the vendor been in business? How many pages does the vendor currently manage on contract per month? The vendor should have a team of professionals assigned to this account. The vendor shall provide a list of key employees and their roles.

2. **Company Experience.**
   Vendor shall list 4 verifiable current customer references for who the vendor is providing a managed print solution that is similar in size of fleet and number of locations. Vendor shall provide a brief overview of each customer along with contact phone/email/fax details of individuals that can be contacted for reference. For each customer, vendor shall provide a list of challenges involved and how they were overcome.

3. **Authorized Dealer.**
   Vendor must be authorized by the manufacturer to sell and service all products required for a managed print solution. In addition, the vendor must be certified as an authorized warranty deliver partner for each manufacturer. The vendor shall maintain these agreements in good standing for the term of the agreement.

4. **Technician Training.**
   Are the technicians that will be servicing the account trained and certified to service the printers in the fleet? Describe the manufacturer's training as well as the vendors training? What is the structure of your service department; lead techs, senior techs, field techs?

STATEMENT OF WORK

Provide laser printer support, maintenance, supply consumables, asset inventory control, consultative support, training, and account management for all of our networked and non-networked printers. For each requirement below, provide information to satisfy the details of each one:

1. **Service Requests.**
   Requesting toner and/or service support must be easy and efficient yet at the same must reach the vendor and be responded to. Ideally the vendor will offer multiple methods of requesting toner and/or service. In addition, if using the FMAudit (or similar) remote monitoring software (see nbr 2 below), the software will alert the vendor of toner low situations. The vendor shall describe the process for submitting service tickets. Is there a website option for submitting requests? Toll free phone number for requests? Is there reporting available upon request showing the number of service requests, requested by, actions taken, etc?

2. **Remote Monitoring.**
   Vendor shall install FMAudit (or similar) remote monitoring software to gather data and report information on the fleet. Vendor shall provide the client with a secure portal that stakeholders can use to see information about the printer fleet. This remote monitoring software also reports page counts to the vendors eliminating the need to send personnel on-site to gather page counts which help keep the overall cost of printing lower.

3. **Authorized Dealer.**
   Vendor must be authorized by the manufacturer to sell and service all products required for a managed print solution. In addition, the vendor must be certified as an authorized warranty deliver partner for each manufacturer. The vendor shall maintain these agreements in good standing for the term of the agreement.

4. **Pre-Sales Consulting.**
   Vendor shall provide on request, pre-sales onsite user consulting services that include but are not limited to, user consultations, written configurations, price quotes, and product specification materials. Vendor shall always provide information on updates to the manufacturer's product line that exhibit new technology that may improve the user experience, work flow, or economics. Most importantly though, the right vendor should first "listen" – the vendor should ask the right questions, understand your goals with the new hardware, where it will be used, how it will be used, what are the users expecting? If a vendor doesn't take the time to listen, chances are good that your new device will not meet your expectations.

5. **Training.**
   Vendor shall always provide Key Operator training on devices that are new to the fleet at no additional charge.

6. **Installation.**
   Vendor shall install products within 2 days of delivery. All work must be performed during regular business hours, Monday through Friday, 8:00am until 5:00pm. There may be certain circumstances where the in-house staff installs and sets up new devices. In those cases, the vendor will be advised. Installation services should be provided at no additional charge. The in-house staff will provide specific details on device configuration on a printer by printer basis as needed.

7. **Manuals.**
   Vendor shall provide manuals and documentation for all equipment purchased at the time of installation. Additional manuals may be request for a nominal per page cost from the vendor.

8. **Management Reports.**
   Vendor shall provide to us the following reports in both electronic and paper format. They should be provided at least quarterly or upon request:
   - Volume Trends
   - Device Utilization
   - Device Aging
   - Problematic Device

   As one of the most important deliverables to a managed print service, the vendor should never charge for standard reporting. It should be included in the per page costs.

9. **Service Response Time.**
   Vendor shall commit to a guaranteed on-site service response time of NO MORE than 4 hours for locations in major markets. This means 4 hours from the time of the initial call to the time a service technician arrives on-site. For satellite locations, Next Business Day is generally acceptable. What is the vendor's guaranteed service response time based on the list of locations provided? Is there reporting available that illustrates the vendor's compliance with this commitment?

10. **First Time Fix Success.**
    Vendor should have a verifiable first time fix rate of greater than 85%. This means in over 85% of all service calls, the tech was able to fix the printer in the first visit. This demonstrates the vendor has trained and qualified technicians and supports those technicians with available repair parts. What is the vendors first time fix rate? Upon request, the vendor should provide to you documentation supporting their first time fix rate claim.

11. **Ongoing Fleet Optimization.**
    By means of the reporting provided, the vendor shall always monitor the fleet and volume data to make certain devices are placed appropriately. Often times just swapping one model with another can significantly impact the cost of printing. Vendor may agree to perform a company-wide fleet mapping and optimization study once contract is awarded.

12. **On-site Service.**
    In an effort to maintain productivity and workflow, it is most important that the technicians assigned to the account be trained and knowledgeable specifically about the devices being supported. The vendor should have a clearly defined training and certification policy. Who is certified by the manufacturer? Who is certified by the vendor?
    Once on-site, the goal should be to repair the printer as expeditiously as possible so as not to impact the productivity of the users. In order to achieve this, the technicians must be highly qualified and well trained. But in every fleet there will be a repair that is beyond the skill set of the on-site employee. It is important the vendor have an infrastructure in place to support their techs in the field. The vendor shall describe its escalation procedures for problem printers.

13. **Loaner Printer Program.**

    Vendor shall have a program in place for those situations where it takes an extended amount of time to complete a repair. Vendor shall agree to place a device with similar printing capabilities as the broken printer if the vendor is unable to repair a printer after 48 business hours. The client may decline a Loaner Printer for non-critical areas.

14. **Toner Service.**

    The managed print service provider should provide all toners for every printer in a manner that insures the users are never down for lack of toner. The toners are typically shipped to the location upon notification of toner low, either from the remote monitoring software, or by internet or phone, whatever method the vendor provides. What method does the vendor use to provide toner? Are toners shipped immediately upon request? How are duplicate requests for toner handled?

    The other area of concern related to toner service is bad cartridges. Every manufacturer occasionally has non-performing cartridges in the system. How are defective cartridges handled? Do we pay extra if a cartridge is defective? In a true managed print service program, you should not pay any extra for the cartridges that fail or underperform. The vendor assumes that risk. In a true managed print service program you should only be charged for the pages you actually print.

PRICING & BILLING

In a true managed print services program, the vendor should propose all pricing by cost per page by model. Some vendors may try to blend all of the engines into one rate. This usually negatively impacts your overall savings. Most clients print the bulk of their pages on high volume machines that typically have the very lowest page rates by their very nature. When a vendor blends the rates into one mono/black rate and one color rate, you are paying a higher rate on the bulk of your printing than you would have to be if the models are broken out because the vendor needs to collect extra on every page to cover the costs of the higher cost per page printers. There should be no minimums or maximums unless there is a periodic true up. You should only pay for the pages you print. Most vendors define a page (or impression) as one 8 ½" x 11" sheet with printing on one side. Duplexing or printing on legal or 11"x17" paper will cost more. A vendor should also be very willing to work with you to integrate their billing into the format that makes most sense for your accounting team. If you require billing to be broken out by department, or cost center, or even by the single device, your vendor should be able to integrate the billing to meet those needs. Billing is typically done by quarter in advance. So you would be billed an estimated number of pages for the current quarter. Then at the end of the quarter and when page counts have been collected, your actual printing is "trued up" against the actual and that quarter's actual should be used to estimate the next quarter's billing.

1. **Pricing.**

    The vendor shall provide their best cost per page by printer model that will be supported. Indicate up front that the RFP will not be going to a best and final offer round so the vendor gives you their very best pricing up front. How does the vendor define a page or impression? How are the rates calculated for duplexed pages or legal or 11"x17" printing? Does the pricing include minimums or maximums? What are the costs for service and repairs? What are the costs to ship the toners?

2. **Adding or Removing Printers from Program.**
   There should be no cost to add additional printers to the program if they are new (there should be no "program costs" or "enrollment fees"). If the printers are used or refurbished, they typically will not have toner installed. In those cases, expect a nominal fee for the first cartridge of toner. What are the costs to add a new printer to the program? What are the costs to add a used or refurb printer to the program? In what situations can printers be removed from the program? Just like the add-ons, there should be no fee to remove a printer from the program if it is being retired, or if it has been sold or scrapped and is no longer available for printing.

3. **Other Charges.**
   In a true manage print services program, there should be no additional charges for printing. Obviously if you order printers or other hardware you will be billed separately for those. But there should be no other charges billed as program charges. The vendor shall describe other potential charges.

4. **Contract Term.**
   In all cases, your very best costs start with agreement terms of 36 months or greater. That is usually sufficient time for a vendor to recoup the start-up costs. Agreements with terms of less than 36 months typically cost more because the vendor needs to amortize the start-up expenses throughout the term. What term of agreement is the vendor offering? Will any automatic renewals be offered? Explain the procedure required for automatically rolling the agreement into a renewal.

5. **Billing Cycle.**
   The vendor should describe the billing cycle; how long is it? How are page counts obtained? Describe the true-up process. How does the vendor determine the number of mono/black pages and the number of color pages? Does the vendor bill in advance? Then based on your systems, it is important to know how the vendor will be invoicing you. If electronic invoicing is important, is it available?

6. **Billing Format.**
   Probably the most important part after the cost per page. After determining what the most efficient format to receive the billing detail you must determine if the vendor can accommodate your needs. Does the vendor do custom billing formats? Can the vendor break out charges by client defined departments or cost centers and use client provided billing codes? If the client requires invoices to contain a purchase order number, can the vendor insure that each billing will have that number? What are the vendors terms of payment? What happens if there is a dispute?

ADDITIONAL VALUE ADDED SERVICES

Chances are good that your current printing environment is in need of optimization. As time goes by devices are used different than originally intended and often clients have a fleet that is out of balance. Simply swapping existing devices to make certain the right device is placed in the right location can often immediately reduce your overall cost of printing. Most clients also have copiers at various stages on a lease.

The very best managed print service providers have programs that add to the value they offer which include fleet optimization. Optimization shouldn't be as simple as dumping the old printers and replacing them with new. Optimization should involve a mapping of the environment, understand each device, its placement, and the work flow needs of the users making use of that device. Then the professional managed print services vendor can come back to you with recommendations for implementing an optimization strategy. Optimization is one of the buzz words these days. Be wary of vendors who recommend replacing all of your old hardware with new.

The vendor should briefly outline additional value added services they will offer.