

How to run an RFP for IT Managed Services

A Comprehensive Guide



Selecting the right IT support provider is one of the most critical decisions your business will make. A well-structured Request for Proposal (RFP) process ensures you find a partner who understands your needs, has the expertise to support your goals and can protect your business as it grows. This guide will walk you through the essential steps and considerations for running an effective RFP for IT managed services.

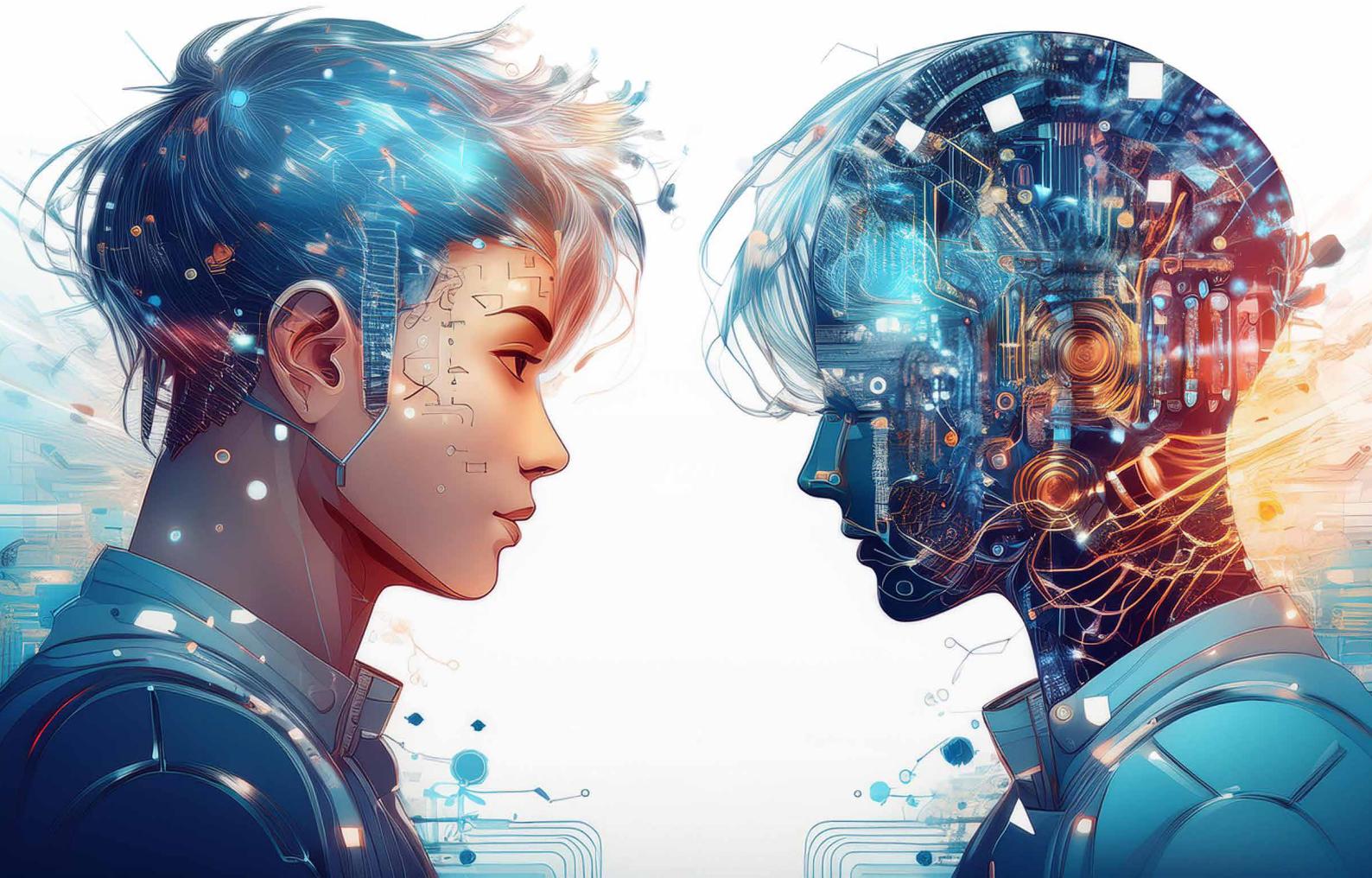


Why an RFP Matters

An RFP isn't just a formality—it's your opportunity to:

- Clearly define your technical requirements and business objectives
- Compare providers on a level playing field
- Identify partners who align with your industry and values
- Ensure you're getting the best value and service for your investment

A thorough RFP process helps you move beyond price comparisons to find a true technology partner.



Step 1: Define Your Requirements



Before reaching out to potential providers, take time to assess your current and future needs:

Technical Infrastructure

- What systems, software and hardware do you currently use?
- What are your plans for growth or technology upgrades?
- Do you have specific industry requirements (e.g., creative software, security compliance)?

Support Coverage

- **Hours:** Do you need 24/7 support, or are business hours sufficient?
- **Response times:** What's your tolerance for downtime? Define your SLA expectations
- **On-site vs. remote:** Will you need engineers on-site, or can most issues be resolved remotely?

Strategic Goals

- Are you looking to improve security posture?
- Do you need guidance on AI adoption or digital transformation?
- What role should your IT partner play in your business strategy? security compliance?

Step 2: Identify Key Evaluation Criteria



Not all IT managed services providers are created equal. Here are the critical factors to assess:

Industry Knowledge

Does the provider have experience in your sector? For creative agencies, marketing firms, or specialised industries, working with a provider who understands your unique workflows and software requirements is invaluable. Ask for case studies and client references from similar businesses.

Certifications and Standards

Professional certifications demonstrate a provider's commitment to quality and security:

- **ISO 27001:** Information security management—critical for protecting your data and client information
- **ISO 9001:** Quality management systems—ensures consistent, reliable service delivery
- **Vendor-specific certifications:** Apple Consultants Network, Microsoft partnerships, or other technology-specific credentials that align with your tech stack

These certifications aren't just badges—they represent audited processes and ongoing compliance that directly benefit your business.

Technology and Tools

- **Ticketing system:** A professional ticketing system ensures nothing falls through the cracks and provides transparency into issue resolution
- **Remote monitoring:** Proactive monitoring can identify and resolve issues before they impact your business
- **Documentation:** How does the provider document your systems and maintain knowledge bases?

Security Expertise

In today's threat landscape, security can't be an afterthought. Evaluate:

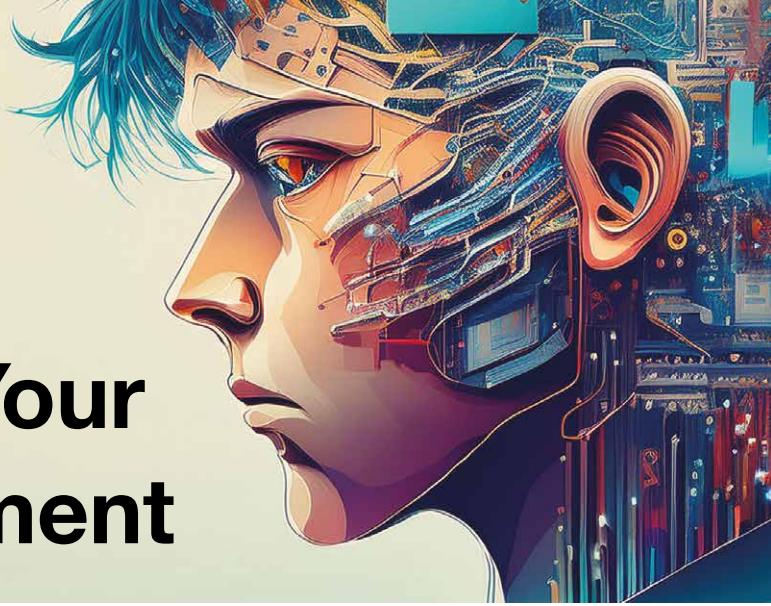
- How the provider approaches cybersecurity
- Their experience with security frameworks and compliance
- Incident response capabilities and protocols
- Backup and disaster recovery strategies

Innovation and Strategic Guidance

Your IT partner should help you stay ahead of technology trends:

- **AI and emerging technologies:** Can they guide you on tools like Microsoft Copilot vs. ChatGPT and help you adopt AI securely?
- **Licence optimisation:** Are they actively helping you manage costs and eliminate waste?
- **Strategic planning:** Do they offer quarterly business reviews and technology roadmapping?





Step 3: Structure Your RFP Document

A well-organised RFP makes it easier for providers to respond comprehensively. Include these sections:

Company Overview

- Brief description of your business
- Number of employees and locations
- Current technology environment
- Industry and any regulatory requirements

Scope of Services

Be specific about what you're looking for:

- Help desk and user support
- Infrastructure management
- Security services
- Strategic consulting
- Project work and implementation support

Service Level Requirements

- Expected response and resolution times
- Coverage hours and availability
- Escalation procedures
- Performance metrics and reporting

Evaluation Criteria

Let providers know how you'll assess their proposals:

- Technical capability and experience
- Cultural fit and communication style
- Pricing and value
- References and case studies

Submission Requirements

- Proposal deadline
- Format and delivery method
- Required documentation (certifications, insurance, references)
- Timeline for evaluation and decision



Step 4: Evaluate Proposals Objectively

When proposals arrive, create a scoring matrix based on your evaluation criteria. Look beyond the numbers:

Read Between the Lines

- Does the proposal demonstrate understanding of your business?
- Have they asked insightful questions or made valuable recommendations?
- Is the communication clear and professional?

Assess Value, Not Just Price

- The cheapest option often becomes the most expensive in the long run. Consider:
- What's included in the quoted price vs. what's extra?
- How does pricing scale as you grow?
- What's the total cost of ownership, including your internal time managing the relationship?

Check References Thoroughly

Don't skip this step. Ask references:

- How responsive is the provider?
- How do they handle challenging situations?
- Would you choose them again?
- What could they improve?



Step 5: Shortlist and Interview



Narrow your options to 2-3 finalists and schedule in-depth conversations:

- Meet the team who will actually support you, not just the sales representatives
- Discuss specific scenarios relevant to your business
- Ask about their approach to onboarding and knowledge transfer
- Evaluate chemistry—you'll be working closely with these people

Step 6: Look for a Partner, Not Just a Vendor

The best IT managed services relationships are partnerships.

Look for providers who:

- Take time to understand your business goals, not just your technical environment
- Proactively suggest improvements and optimisations
- Communicate clearly and regularly
- Are transparent about challenges and realistic about solutions
- Invest in the relationship beyond the monthly retainer

Common Pitfalls to Avoid

- **Focusing only on price:** The lowest bid rarely delivers the best value
- **Vague requirements:** If you're not specific about what you need, you'll get generic proposals
- **Ignoring cultural fit:** Technical competence matters, but so does working well together
- **Rushing the process:** Take the time to do this right—it's a critical decision
- **Not involving stakeholders:** Get input from team members who will interact with IT support regularly

Making Your Final Decision

Once you've completed your evaluation:

- Review your scoring matrix and notes from all interactions
- Consider both quantitative and qualitative factors
- Trust your instincts about the relationship and communication
- Negotiate contract terms that protect both parties and set clear expectations

Setting Up for Success

After selecting your provider:

- Establish a clear onboarding plan with milestones
- Schedule regular check-ins and quarterly business reviews
- Define communication protocols and escalation paths
- Set up feedback mechanisms to continuously improve the partnership



How Kaizen IT Addresses These Considerations

At Kaizen IT, we understand that choosing an IT managed services partner is about more than technical specifications—it's about finding a team that truly understands your business and can support your growth. Here's how we address the key considerations outlined in this guide:

Deep Industry Expertise

We specialise in supporting creative agencies, marketing firms, and professional services businesses. With 60-70% of our clients in the creative sector, we understand the unique demands of your industry—from Adobe Creative Cloud and Apple ecosystems to the fast-paced project workflows that define creative work. Our team speaks your language and understands the tools that power your business.

Recognised Certifications and Standards

- **ISO 27001 certified:** Our information security management systems are independently audited, ensuring your data and your clients' data remain protected
- **ISO 9001 certified:** Our quality management processes guarantee consistent, reliable service delivery
- **Apple Consultants Network member:** As an Apple Premium Technical Partner, we maintain the highest level of Apple certification, with our engineers completing advanced Apple training annually
- **Microsoft partnerships:** We're experts in Microsoft 365, Azure, and the full Microsoft stack



Professional Tools and Proactive Support

We use enterprise-grade ticketing and CRM systems that provide complete transparency into every support request. Our proactive monitoring identifies and resolves issues before they impact your business, and we maintain comprehensive documentation of your environment to ensure consistent support.

Security-First Approach

Security isn't an add-on... it's fundamental to everything we do. Our ISO 27001 certification demonstrates our commitment to protecting your business. We can guide you through secure AI adoption, helping you understand the critical differences between tools like Microsoft Copilot (which keeps your data sandboxed and secure) and ChatGPT (where data is used for training). We help creative businesses leverage AI's power whilst maintaining the security their clients demand.

Strategic Partnership and Innovation

We don't just fix problems, we help you plan for the future:

- **Licence optimisation:** We actively analyse your software usage to eliminate waste and ensure you're only paying for what you need
- **Quarterly business reviews:** Regular check-ins to align technology with your business goals
- **AI guidance for creatives:** Helping you navigate the rapidly evolving AI landscape securely and strategically
- **Flexible support plans:** Tailored to your needs, whether you require 24/7 coverage or business hours support

Proven Track Record

Our clients choose to stay with us because we deliver on our promises. We've built long-term partnerships with creative agencies and professional services firms across London, Manchester and Glasgow. We're currently expanding our presence on the Apple Consultants Network, reinforcing our position as trusted Apple experts for creative businesses.

The Kaizen Philosophy

Our name, Kaizen, means “continuous improvement” in Japanese. This philosophy is at the heart of everything we do. We're constantly evolving our services, staying ahead of technology trends and finding new ways to add value to our clients. We don't just maintain your systems, we help you optimise, innovate and grow.



Conclusion

Running a thorough RFP process requires time and effort, but it's an investment that pays dividends. The right IT managed services partner becomes an extension of your team, protecting your technology investment, supporting your people and enabling your business to thrive.

By focusing on expertise, industry knowledge, certifications and cultural fit, rather than just price, you'll find a partner who can support your business today and help you navigate the technology challenges of tomorrow.

Whether you're a creative agency navigating AI adoption, a growing business needing scalable support, or an organisation prioritising security and compliance, the right RFP process will help you find the IT partner who can meet your unique needs.



Ready to find your IT managed services partner?

If you'd like to discuss how Kaizen IT can support your business with expert IT services tailored to the creative and professional services sectors, or if you're considering running an RFP and would like guidance on the process, we're here to help.