

# MPSA

## Managed Print RFP Template eBook

Standards and Best Practices  
November 2021



The MPSA definition of Managed Print Services (MPS):  
“Managed print services is the active management and optimization of business processes related to documents and information including input and output devices.”

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# MANAGED PRINT SERVICES ASSOCIATION

The MPSA is the only international, independent and nonprofit MPS organization that embraces all industry participants in a collaborative environment. The MPSA is NOT owned or directed by any one organization; it is in fact owned by its members. The influence of any single company, large or small, is prevented by the MPSA charter.

## Our Mission

The mission of the MPSA and its members is to address and optimize businesses' office document management while enhancing the growth, efficiency, and profitability of the MPS segment through advocacy, marketing, education, research, standards, and a general community of interest. In order to reach these objectives, the MPSA provides community-driven best practices—like those contained in this eBook—to empower its members to make more informed decisions regarding their MPS strategies.

Presented by the  
**Standards and Best  
Practices Committee**

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# Introduction



Almost all independent MPS providers usually have three customer segments in common - schools, state/local government organizations and hospitals. When working within these industries, including large enterprises and non-profits, RFPs are no stranger to MPS providers and are simply part of doing business.

When providers have the chance to get ahead of the RFP process and consult with the prospective buyer through their requirements, the MPS organization is set up with a higher chance of winning the business. It's been said that the chances of winning the lottery are better than winning most RFPs. MPS providers only have a chance if they "buy a lottery ticket;" they have to participate in the RFP process.

The MPSA Standards and Best Practices Committee (SBPC) identified that for MPS providers to be more successful, they should actively provide prospects with a list of RFP requirements to guide the buying criteria to be aligned with the best interests of the customer as well as favor the strengths of the MPS provider. The goal of this eBook is to provide industry best practices to help set MPSA members apart from their competition to win more business.

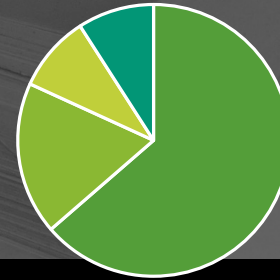
This eBook also includes an infographic with results from an online survey focusing on the reality and challenges of the MPS community with RFPs. The committee appreciates the time spent from the respondents of the survey.

And a special thank you to all the volunteers and committees of the MPSA that made this report a reality. Without our volunteers, there isn't an MPSA. We ask any reader of this report to consider becoming a volunteer with one or more committees with the MPSA.

# SURVEY SAYS

## FEEDBACK FROM MEMBERSHIP

# of RFPs/year



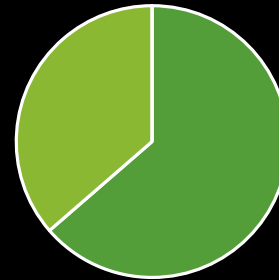
■ Up to 50 ■ 51 to 200 ■ 201 to 1000 ■ Skipped

Here are the basic findings, based on a survey for the MPSA membership in 2021:

1. Most MPSA member organizations are managing up to 50 RFPs per year.
2. Most of the time, 1 to 3 people are involved in the RFP process.
3. More than half the time, MPSA members regularly or occasionally have the ability to provide an RFP Template to the customer.

This Managed Print RFP Template resource is to help MPSA members be ready to provide an RFP Template that helps position their companies to win more RFPs and to reduce the amount of time to participate in the sales process.

People Involved?



■ 1 to 3 ■ 4 to 6 ■ 7 to 10

Blank Template?



■ Never ■ Occasionally ■ Regularly ■ No Clue

# Managed Print RFP Template

The following sections are included in the eBook for MPS providers to consider as a Managed Print RFP Template to incorporate in their MPS engagement strategy:

1. **Supplier Information**
2. **Equipment Requirements**
3. **Toner/Ink Fulfillment Requirements**
4. **Break / Fix Service**
5. **Security and Solutions**

This list of requirements is the top list of criteria to consider, and it is not an exhaustive list. MPS providers should reflect on these requirements as minimum recommendations in their MPS offering to prospective buyers. It does not mean you cannot add others, ex. Extensive Sustainability Section.

This eBook is a collaboration led by the SBPC and has been reviewed and approved by the MPSA executive committee, board of directors and distinguished MPSA members. The SBPC has also collaborated with RFP software providers to ensure the content can be easily integrated into a prospect's RFP software platform.

Readers of this eBook can provide direct input regarding the report to [standards@yourmpsa.org](mailto:standards@yourmpsa.org) to be considered for future amendments or additional educational formats like podcasts and webinars presented by the MPSA.

# Supplier Info

This section covers information about your company and your Managed Print offering.

## 1. Describe the scope and depth of your MPS program.

This is an opportunity to detail that your organization is a professional MPS provider and that you have detailed and established services to offer to the customer. If your competition does not have a well-defined MPS program, they will struggle to put together a comprehensive response.

## 2. Explain your organization's infrastructure to support your MPS program

Take the time to share details about the people, processes and technologies that make up the infrastructure for your MPS program. This allows you to detail who is involved and how your MPS offering is backed up.

Your answer should also be reflective of your company's LinkedIn profile, your company website and other social media platforms your company utilizes.

## 3. Explain the client engagement process as it applies to your MPS program.

If you have a client engagement and governance model, highlight your professional approach to your customer services and how your organization goes well beyond the initial acquisition. This is an opportunity to detail operational and executive business reviews and include change management processes.

# Supplier Info



## 4. Explain how your MPS offering will help the customer meet its goals.

Knowing your customer's goals and sharing customer references that align with those goals is a recipe for success. If your competition is just responding to the RFP without insider information from the customer, they will fail.

## 5. Summarize the metrics established to measure growth, efficiencies or cost savings to improve the customer's organization.

As a managed print services provider, you can share the scorecard of metrics that are relevant to the customer's business so progress can be measured in terms of the business plan. This would be important for regular communication with the customer as well as communicating within your company on the profitability and management of the account.

## 6. Describe how you evaluate and implement ongoing program improvements.

In addition to the scorecard for regular business reviews, share your governance model for continuous improvement and new opportunities for products and services in line with the business strategy of the account.

# Supplier Info



7. **Explain what makes your organization and MPS offering stand apart from others (e.g., certifications, processes, technologies, etc.).**

A majority of print providers lack certification from a recognized third-party organization regarding their level of service for managed print. There are technical certifications which usually trickle down from the OEM and ISV vendors, but these generally don't set your business apart from another provider.

Consider a vendor-neutral certification like Managed Print Certified from the MPSA . This certified credential, previously the CompTIA Managed Print Trustmark, identifies provider businesses that have demonstrated a high level of competency and adhere to prescribed industry best practices, serving as a reference to the quality of the services these companies provide and the commitment they make to their clients.

8. **Summarize additional applicable services that your organization can provide that the customer is not considering in this RFP.**

The question keeps the door open to "What else can I sell you?" This allows you to include additional services that demonstrate the breadth of your MPS offering including managed services beyond print.

# Supplier Info



- 9. Detail the billing model that works best for our company and why this model over other options.**

This is the chance to propose the best billing model for your company and the customer, whether it is cost per copy with lease options, XaaS, Flat Rate, etc.

- 10. Provide background of a minimum of 3 other similar MPS customers where you deliver the services you are proposing to us.**

List details of other companies where you provide these services. Business size, # employees, # locations, # states serviced, Industry, solution outline, and success. Providing references from these customers on your performance will help you stand out from the crowd.

# Equipment Requirements

This section goes beyond equipment model numbers and details the areas for assessments, installation and ongoing fleet optimization.

1. **Please describe your methodology for completing site assessments and individual device placements (Solution Design).**

This is an opportunity to outline the data collected and how it is used to develop a customer centric solution.

2. **Describe your process for identifying client specific equipment portfolios and the devices chosen for this engagement.**

Provide your model and features recommendations:

1. List speeds and feeds (Including scanning)
2. Provide consumable yields
3. Specify paper tray, finishing and other option details.
4. Provide pricing for all recommended configurations and impressions.

Ensure this is strongly linked to and built from point 1 above, showing your use of data to make informed decisions.

3. **Describe your firm's approach to equipment and consumable sustainability.**

Refer to ISO standards, responsible recycling, etc. and make a specific call out if the customer is an ISO certified organization and their responsibility to add weight in their decision to this section.

# Equipment Requirements



#### 4. Describe your installation / removal and disposal processes.

Your response should address staging, disposal, data sanitization, project planning and other key activities, including training.

#### 5. Are you an OEM or a dealer? Which OEMs are your partners and why?

Clients will want to understand your position and strength of relationships to gauge the level of support they may expect. Quantify partnerships in terms of size and duration.

#### 6. Explain scanning capabilities to help facilitate secure, digital workflows including network faxing.

A quality response should include standard and optional scan workflow capabilities. Describe any required apps or necessary services in order to enable scanning capabilities.

# Equipment Requirements



## 7. Describe any proactive device monitoring programs or processes.

Your response should be detailed and outline any proprietary or open-source tools, technology and protocols, as well as their benefits.

## 8. Describe your ongoing fleet optimization activities.

Activities should include but are not limited to device polling, firmware updates, patches and right sizing activities.

## 9. List any industry awards or recognition associated with your company as a whole, MPS specific services and the specific devices recommended for this engagement.

Take advantage of the awards your company and your suppliers have achieved recently. These include Buyers Lab Awards, Managed Print Certified by the MPSA, Best Places to Work Awards, etc. (too many to list here)

# Toner/Ink Fulfillment

This section focuses the supplies fulfillment process including meeting organizational goals, certifications and SLAs.

## 1. Describe the supply fulfillment process.

In detail, explain what procedures you will put in place to manage the supply fulfillment process. Include any automation software you may use. Clarify what our involvement or responsibilities will be in the process.

## 2. Explain how you will manage supply usage and supply inventory.

Describe how you will manage the supply usage in conjunction with printer usage. Be clear on whether you will have supply inventory on hand or if all orders will ship as needed.

## 3. Explain how the software will allow automated fulfillment based on alerts and triggers.

This is your opportunity to explain whether this will be a truly automated fulfillment or if there are manual processes as well. Will the triggers be based on percentage of toner left, pages of print remaining or on days of print remaining? Explain the benefits of your chosen process.

## 4. Explain how your automated fulfillment will help us meet our usage goals by adjusting to our print patterns.

By looking at print usage and printing patterns, explain the process to ensure that timely delivery of the supplies will be met. Examples, more toner during peak season, adjusting fulfillment triggers, etc. Remember that we are striving for a no inventory environment if possible, as this benefits both the customer and the dealer.

# Toner/Ink Fulfillment



5. **Summarize the metrics established to measure efficiencies or cost savings to improve or remove unneeded inventory.**

Using the processes described above, how will you both measure efficiencies and report cost savings. Show examples of reports. Explain frequency of reports, milestones, and/or measurements.

6. **Describe how you evaluate and implement ongoing program improvements.**

Describe in detail how you will determine your baseline including specific parameters for supply usage and fulfillment and then how you will use that analysis to evaluate and implement improvements.

7. **What certifications or industry standards will you use to choose the type of supply to be used in the MPS program (e.g. certifications, ISO standards, OEM, remanufactured, compatible)**

Show certifications based on the type(s) of supplies you will use. Please include any certifications or protections your solutions have in securing our data and systems.

# Toner/Ink Fulfillment



## 8. Explain how you will protect our organization from IP infringing supplies.

Be specific when explaining the type of protection or indemnification by each type of supply if you are using non-OEM supplies.

## 9. Explain how you will report/meet established SLA's around supply fulfillment.

Based on pre-established SLA's, show examples of reports that will be used, how the data will be presented, the frequency of the reports and what actions will be taken to correct any unmet SLA's.

## 10. Summarize additional applicable services that your organization can provide that we are not considering in this RFP. What is your unique selling proposition?

This is your opportunity to explain why you should be considered for this RFP. What else can you bring to this program that is of value that we may not have requested in this RFP

# Break/Fix Requirements

This section details the Managed Print maintenance offering highlighting details tools, processes and references.

1. **Explain what software or solutions are required to deliver your break/fix service solutions.**

This is where you will list any software needed in the customer's environment (on premise/Cloud based) used to provide info for monitoring device status, reporting, service ticketing, diagnostics, etc..

2. **Explain process and options used to deliver and manage reactive break/fix service issues.**

This is where you will explain how a user reports a device issue. Is it done via phone, email, portal, chat, etc.. What are the troubleshooting steps they will be required to provide? How do they check the status of the reported issue? What are the escalation paths?

3. **Describe how you proactively identify potential break/fix issues before a device has been reported.**

This is where you explain if you have any processes or systems to alert in advance of potential device issues. These could be predictive (based on AI or historical data), or proactive (before reported). How would the customer be alerted?

# Break/Fix Requirements



4. **Explain the background, experience, and certifications of any technicians that will be performing onsite service of our equipment.**

Explain the background, training, and certifications for your onsite technicians. What is your dress/attire protocol? Will they be badged? Are they insured? Do they call ahead of arriving? How are they supported through complex issues (knowledgebase, centralized IP oversight and remote assistance, etc.)

5. **List all of the break/fix service related reporting used and provided to us for your solution.**

List all reporting and timing in this area. There should be reporting around SLA attainment, trending on service calls, ongoing device recommendations or replacements at a minimum. Also explain how reporting can be requested outside normal schedules.

6. **Explain how your solution will ensure you meet our SLA requirements to maintain utilization.**

Explain processes and tools that are combined to ensure you are meeting SLA's, and any remedies or credits when SLA's are not met. Also explain in this section how print capabilities will be provided if a device is not capable of performing services outside of SLA benchmark. Make sure you speak to proactive and preventative service / maintenance calls to keep out of SLA criteria, as these initiatives would prevent downtime and therefore not impact SLA.

# Security and Solutions

This section focuses on solution technologies going beyond the equipment and supplies focused adding additional value.

1. **With specificity, please detail how your company utilizes technology to optimize managed print services offerings. What types of technology are currently being used?**

Detail different areas and corresponding solutions you will propose or have available in delivering your overall solution, as well as the benefits for each.

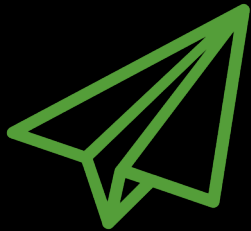
2. **What software solutions will you offer to assist our company to manage and reduce costs on an ongoing basis? For each solution, articulate how the savings would be achieved for both tangible and intangible costs.**

Detail specific areas and corresponding software. What are the expected benefits and ROI? Be sure to reference employee productivity and security where applicable.

3. **Explain how you will protect the customer's organization from security risks.**

Security must be addressed upfront in your recommended response. As IDC has claimed that a third of global companies have been a ransomware victim in 2021 and the average ransomware payment was \$250,000, don't miss an opportunity to share additional security services that set you apart from basic print providers.

# Security and Solutions



## 4. Provide an overview of your proposed portfolio's security model and features.

Outline protocols, encryption levels, and other key information to ensure data privacy in transit, at rest and post printing. Also be sure to explain your documented security policy and how it is implemented and maintained through process and/or software.

## 5. With print solutions being required to be installed on the network, what is your security policy for information management and device protection? Provide draft Security Policy in response.

List solutions requiring software to be loaded with a high level overview. Provide white papers/requirements and Security related documentation.

## 6. Software doesn't print, people do. What is your training program for enabling users to adopt the technology so that our company will reap the benefits?

Detail training provided, frequency, and format. Detail if there is also communication to customers or on demand documents for reference explaining the solution.

# Security and Solutions



7. **What is your process for ongoing review of our environment in recommending additional software or solutions to improve/benefit our organization?**

Explain review and evaluation process and frequency. Include any examples of what is provided/reviewed.

8. **We want to best understand the benefits, cost elements and installation requirements for each of the following solutions which we are considering to be a part of our MPS ecosystem.**

Provide Features/benefit explanations for each of the below categories.  
Explain the cost per category.

7. Device Management
8. Pull Print / Secure Print Release
9. Information Digitization
10. Security Certificate Management

## Something missing?

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**Appendix**

**Managed Print RFP Questions**

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2. Explain your organization's infrastructure to support your MPS program.
3. Explain the client engagement process as it applies to your MPS program.
4. Explain how your MPS offering will help the customer meet its goals.
5. Summarize the metrics established to measure growth, efficiencies or cost savings to improve the customer's organization.
6. Describe how you evaluate and implement ongoing program improvements.
7. Explain what makes your organization and MPS offering stand apart from others (e.g., certifications, processes, technologies, etc.).
8. Summarize additional applicable services that your organization can provide that the customer is not considering in this RFP.
9. Detail the billing model that works best for our company and why this model over other options.
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  3. Provide consumable yields
  4. Specify paper tray, finishing and other option details.
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3. Describe your firm's approach to equipment and consumable sustainability.
4. Describe your installation / removal and disposal processes.
5. Are you an OEM or a dealer? Which OEMs are your partners and why?
6. Explain scanning capabilities to help facilitate secure, digital workflows including digital faxing.
7. Describe any proactive device monitoring programs or processes.
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6. Describe how you evaluate and implement ongoing program improvements.
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8. Explain how you will protect our organization from IP infringing supplies.
9. Explain how you will report/meet established SLA's around supply fulfillment.
10. Summarize additional applicable services that your organization can provide that we are not considering in this RFP. What is your unique selling proposition?

# Break/Fix Requirements

This section details the Managed Print maintenance offering highlighting details tools, processes and references.

1. Explain what software or solutions are required to deliver your break/fix service solutions.
2. Explain process and options used to deliver and manage reactive break/fix service issues.
3. Describe how you proactively identify potential break/fix issues before a device has been reported.
4. Explain the background, experience, and certifications of any technicians that will be performing onsite service of our equipment.
5. List all of the break/fix service related reporting used and provided to us for your solution.
6. Explain how your solution will ensure you meet our SLA requirements to maintain utilization.

# Security and Solutions

This section focuses on security and solution technologies going beyond the equipment and supplies, focused on adding additional value.

1. With specificity, please detail how your company utilizes technology to optimize managed print services offerings. What types of technology are currently being used?
2. What software solutions will you offer to assist our company to manage and reduce costs on an ongoing basis? For each solution, articulate how the savings would be achieved for both tangible and intangible costs.
3. Explain how you will protect the customer's organization from security risks.
4. Provide an overview of your proposed portfolio's security model and features.
5. With print solutions being required to be installed on the network, what is your security policy for information management and device protection? Provide draft Security Policy in response.
6. Software doesn't print, people do. What is your training program for enabling users to adopt the technology so that our company will reap the benefits?
7. What is your process for ongoing review of our environment in recommending additional software or solutions to improve/benefit our organization?
8. We want to best understand the benefits, cost elements and installation requirements for each of the following solutions which we are considering to be a part of our MPS ecosystem.
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  - c) Information Digitization
  - d) Security Certificate Management

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