

**COMPANY NAME**

**REQUEST FOR PROPOSAL (RFP)**

**Specify Requested Services**

Issue Date:

**Company Contact**

## **CONFIDENTIALITY AND DISCLAIMER LEGEND**

The contents of this document and any communications between (company) and the recipient, which are related thereto, are and shall be confidential. Except (a) on a "need to know" basis, (b) expressly subject to reasonable care with respect to confidentiality, and (c) expressly in connection with the preparation of responses contemplated hereunder, recipient shall not cause or permit to be used, disclosed or made available to any other person or entity this document or any confidential information received, learned, observed, known by or made available to recipient, or to which recipient has access, without the express prior written authorization of (company). Recipient shall inform every person exposed to confidential information of, and require them to comply with reasonable care in the use and disclosure of this document and any confidential information. Recipient shall return to (company), upon (company)'s request, all materials in any form containing confidential information that are in recipient's possession, custody, or control. Recipient shall not use any (company) trademark, trade name, logo, corporate name or other proprietary names or marks without (company)'s express prior written consent. By acceptance of this document, recipient acknowledges that unauthorized disclosure of confidential information or misappropriation of any (company) trademarks or trade names will result in irreparable harm to (company). For the purposes of the transactions related to this document only, "confidential information" shall have the meaning set forth in the Master Confidentiality agreement executed by the parties, including this document, any related communications, and trade secrets as defined under (state) law. Issuance of this RFP to your company does not commit (company) to any costs incurred in the sourcing, staffing, engineering, preparation, or submission of your proposal to (company) or the costs of any related equipment, evaluation, demonstration, pilot, or trial. The costs and any related liabilities for such activities shall be borne exclusively by each respective bidder.

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# Section 1: RFP Overview & Project Background

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## A. COMPANY BACKGROUND

Company overview:

Find more information about (company) on the Internet at (website).

## B. RFP PURPOSE

Describe complete solution elements and unique concerns.

- Design Services (Fixture & hardware integration)
- Manufacturing (Fixture & hardware integration)
- Implementation Services
  - Staging
  - On-site Installation
- Software
  - Self-Service Software integration.
  - Kiosk Lockdown Software
  - Enterprise Management Software
    - Content Management & Distribution
    - User Interface/Lockdown configuration management and distribution.
    - Monitoring & Alerts
- Software Services
  - Design, Development, Configuration, Deployment, Monitoring, Service Dispatch
- On-site Maintenance Services

## C. PROJECT OVERVIEW

Supplier Selection Project Statement:

Describe structure and phases of project, length of proposed services.

Solution Project Statement:

Project Information

Number of Terminals per Type of Deployment ( if differing)

Assert phased implementation projection.

Potential long-range strategic deployment plans.

## D. RFP DEFINITIONS

### 1. Definitions, Acronyms, and Abbreviations

Provide definitions for terms, acronyms and abbreviations used throughout this document.

## Section 2: COMPANY Program Operations & Procedures

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### A. SUPPLIER SELECTION PROJECT

#### *Information*

#### 1. Project Purpose

#### 2. Project Goals

Business objectives that company has currently defined to determine the success of the Supplier Selection Project include:

#### 3. Supplier Services

#### 4. Timing

- Supplier will start work:
- Supplier will deliver all documentation requested in Scope of Work by:

#### 5. Reimbursement

#### 6. Additional Terms

#### *Requirements*

#### 1. Project Setup

- 1.1. Project control standards
- 1.2. Project Technical /Engineering requirements
- 1.3. Project Kick Off

#### *Any Additional Deliverables*

#### 2. Implementation Plan

- 2.1. Project Plan Phases / Milestone goals
- 2.2. Risk Analysis

### **2.3. Price Quote**

- All costs associated with the package should be considered including, but not limited to:
- Configuration/development costs
- Implementation costs
- License costs (if applicable)
- Hardware costs
- Training costs including a detailed description of the proposed training.
- System Monitoring costs
- Hosted Services costs (content delivery)
- In-house maintenance costs
- Business related operating costs
- Software or Hardware upgrade costs

### **2.5 Executive Presentation**

- Supplier shall build an executive presentation including the following data:
- Solution summary
- Benefit Analysis
- Cost for project completion
- Timeline for project completion

## ***Additional Information***

### **Assumptions**

## E. SERVICE LEVEL OPTIONS / AGREEMENTS

### Service Level Agreements

1. Definition and Classification of Incidents
2. Incident Response and Resolution
3. Extended Resolution
4. Hosting Services
5. Content delivery
6. Data Backup
7. Disaster Recovery

## F. SECURITY STANDARDS

### Hosted Security Standards (if applicable)

The following is the minimum standard for protection of (company) data by Supplier:

Supplier shall ensure that all hosted environments meet the following physical security requirements:

#### **General Security Requirements:**

#### **Password Requirements:**

#### **Security Architecture:**

#### **System Security:**

#### **Procedural:**

#### **Personnel Security:**

#### **Company Information Security:**

#### **Facility Security:**

## Section 3: RFP Schedule/Proposal Due Date

**If Supplier's Proposal is not delivered to and received by (company) by the due date and time set forth in the table below and in accordance with the instructions set forth in the table below, it will be rejected.**

Activity	Responsible Party	Due Date/Time
RFP Issued	Company	
Acknowledgement of RFP & intent to respond delivered by email to: email address	All Suppliers	
Written questions about the RFP delivered by e-mail to: email address	All Suppliers	
Questions compiled and answered by (company)	(company)	
Proposal soft copy delivered by email to: email address Hard copy / soft copy quantities & requirements.	All Suppliers	
Evaluation, Q&A, etc.	(company)	

### Company Procurement Contact Information:

<b>Name</b>	
<b>Address</b>	
<b>e-mail address</b>	
<b>Program Name Reference</b>	

## Section 4: RFP Questions

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Supplier must complete this entire Section.

### A. SUPPLIER'S COMPANY INFORMATION

#### 1. Contact Information

Item	Response
a. Supplier name & address	[Type response here]
b. Website	[Type response here]
c. Number of years Supplier has been in business	[Type response here]
d. Number of employees (i.e., individuals on the payroll) and contractors (i.e., temporary labor))	[Type response here]
e. "Primary" contact name, e-mail address, and telephone #	[Type response here]
f. "Technical" contact name, e-mail address, and telephone #	[Type response here]
g. "Sales" contact name, e-mail address, and telephone #	[Type response here]
h. Parent company name and address (if applicable)	[Type response here]
i. Subsidiaries, if any, and where incorporated.	[Type response here]
j. Supplier's assumed business name(s), if any	[Type response here]

#### 2. Strategic Position

#	Item
a.	Mission & Vision Statement
	[Type response here]
b.	Supplier business history, growth plans, and business objectives.
	[Type response here]
c.	Supplier's market position (#1, 2, etc.) as a provider of these goods or services. Cite source and attach a copy or web link to support response.

[Type response here]	
<b>d.</b>	Total number of active account customers in Year 2006 and year-over-year growth for the past four years.
[Type response here]	

### 3. Financial Profile

#	Item
<b>a.</b>	If Supplier is a publicly traded company, what is its ticker symbol and stock exchange company is traded on?
[Type response here]	
<b>b.</b>	Year and state/country of incorporation.
[Type response here]	
<b>c.</b>	Recent mergers, acquisitions or IPOs.
[Type response here]	
<b>f.</b>	Has Supplier ever filed for bankruptcy or reorganization, or been the subject of involuntary bankruptcy or had a receiver appointed? If so, provide date and explain the nature of the proceeding.
[Type response here]	
<b>g.</b>	Please include a copy of Supplier's latest audited full operating year's results and any quarterly updates that have been published, as well as a copy of Supplier's most recent financial statement. For publicly traded companies, please include Supplier's latest annual report, 10-K and 10-Q reports. A web link to an on-line source is acceptable.
[Type response here]	
<b>h.</b>	If (company) were to award the subject RFP business to Supplier, what percentage of Supplier's business would such award represent?
[Type response here]	

## B. PROGRAM INFORMATION

### 1. Executive Summary

Please provide an overview of no more than two pages summarizing:

- Supplier's understanding of the project objectives
- Goals to be set to ensure the successful achievement of these objectives
- Implementation methodology to achieve (company) RFP requirements
- Supplier's capabilities

[Type response here]
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## 2. References

- a. Please use the following table to name three organizations comparable to (company) in size and business scope that use the goods and/or services contemplated in this RFP and who have consented to act as references.
- b. In addition, please provide names and phone numbers for these contacts who have consented to act as references. Please indicate in "Project Scope & Details" whether they are current clients, the size of the company or subsidiary, the length of time Supplier provided the goods and/or services to such reference, the number of employees, and a description of the deliverables.

REFERENCE #1	
Item	Response
Company Name	[Type response here]
Address	[Type response here]
Contact Name	[Type response here]
Title/Position of Contact	[Type response here]
Contact's Telephone Number	[Type response here]
Contact's Email Address	[Type response here]
Project Start/End Dates	[Type response here]
Project Scope & Details: [Type response here]	

REFERENCE #2	
Item	Response
Company Name	[Type response here]
Address	[Type response here]
Contact Name	[Type response here]
Title/Position of Contact	[Type response here]
Contact's Telephone Number	[Type response here]
Contact's Email Address	[Type response here]
Project Start/End Dates	[Type response here]
Project Scope & Details: [Type response here]	

REFERENCE #3	
Item	Response
Address	[Type response here]
Contact Name	[Type response here]
Title/Position of Contact	[Type response here]
Contact's Telephone Number	[Type response here]
Contact's Email Address	[Type response here]
Contact's Facsimile Number	[Type response here]
Project Start/End Dates	[Type response here]
Project Scope & Details: [Type response here]	

## 4. Supplier Program Operations

### a. Experience / Unique Qualifications

#	Item
1.	Do you currently provide the services described in the RFP to other clients? Yes or No.
	[Type response here]
2.	Provide an example of a program, comparable in size and scope, to the program described in this RFP. Include any non-confidential details of implementation process (if relevant).
	[Type response here]
3.	Describe factors that make Supplier uniquely qualified to provide the goods and/or services contemplated in this RFP.
	[Type response here]
4.	Provide relevant experience that demonstrates Supplier's ability to deliver the goods and/or services as necessary to satisfy (company) requirements.
	[Type response here]
5.	Provide approximate number of total kiosks integrated, and major vertical markets served.
	[Type response here]

### b. Supplier's Engineering Services

#	Item
1.	Describe Supplier's experience creating custom kiosk designs: <ul style="list-style-type: none"> <li>• What percentage of kiosks produced are custom models?</li> <li>• How does customization affect prototype lead-times?</li> </ul>
	[Type response here]
2.	What percentage of design-engineering services are handled by dedicated in-house professionals? <ul style="list-style-type: none"> <li>• What percentage is contracted, and to whom?</li> </ul>
	[Type response here]
3.	Describe Supplier's Design Engineering customer consulting process steps. <ul style="list-style-type: none"> <li>• Outline design process flow.</li> </ul>

[Type response here]	
4.	Provide Supplier's strategy surrounding component supplier selection and qualification.
[Type response here]	
5.	Describe Software Integration and testing procedures. <ul style="list-style-type: none"> <li>• Provide Supplier's management tools for integration.</li> </ul>
[Type response here]	

### c. Supplier's Manufacturing Capability

#	Item
1.	Describe Supplier's dedicated / contracted Manufacturing Capacity: <ul style="list-style-type: none"> <li>• Square footage (if subcontractors are used, describe capacity and location of each)</li> <li>• Manufacturing steps handled overseas and detailed effect on lead-time variability</li> </ul>
[Type response here]	
2.	Provide brief examples of large-scale (over 100 units) national and international deployments (5 examples). <ul style="list-style-type: none"> <li>• Describe production ramp capacity / flexibility / small run pricing penalties.</li> </ul>
[Type response here]	
3.	Provide firm lead times for prototypes and production units. Include both standard and custom model parameters.
[Type response here]	
4.	Describe Supplier's UL and CE certification processes with related timelines.
[Type response here]	
5.	Describe Manufacturer's FCC testing timeline.
[Type response here]	

#### d. Supplier Quality

#	Item
1.	Is supplier ISO9001 Certified? <ul style="list-style-type: none"> <li>• Since what year?</li> <li>• Any interruptions in certifications?</li> </ul>
[Type response here]	
2.	Describe Production / Electrical / Mechanical QA Testing procedures. <ul style="list-style-type: none"> <li>• Final testing procedures</li> </ul>
[Type response here]	
3.	Who in Supplier's organization is responsible for performing "root cause" analysis on performance failures? How is this communicated to the customer?
[Type response here]	
4.	Are Supplier's kiosks and components manufactured / integrated RoHS compliant?
[Type response here]	
5.	
[Type response here]	

#### e. Installation / Field Support

#	Item
1.	Have you ever implemented any program with comparable complexity to the (customer) program described in RFP? <ul style="list-style-type: none"> <li>• Cite examples of remote and international support.</li> </ul>
[Type response here]	
2.	Can Supplier train customer to do site surveys / preparation, and equipment installation? <ul style="list-style-type: none"> <li>• On-site maintenance training / planning?</li> <li>• Affix menu of installation / maintenance / service options.</li> </ul>
[Type response here]	

3.	How many field service technicians does supplier have available, and in what countries?
[Type response here]	
4.	What are response time schedules? <ul style="list-style-type: none"> <li>• Phone?</li> <li>• On-site field personnel?</li> </ul>
[Type response here]	
5.	Describe how hardware design supports access for field service.
[Type response here]	

**e. Other**

#	Item
1.	
[Type response here]	
2.	
[Type response here]	
3.	
[Type response here]	
4.	
[Type response here]	
5.	
[Type response here]	

**C. Terms and Conditions**

Unique company terms.

**D. Pricing**

Attach quotes for hardware, software, and service options.