

How to Write an Invitation to Tender/ RFP for Managed Print Services

For medium to large sized enterprises in GHANA (minimum 200 users)

Managed Print Services mean different things to different people and **one size does not fit all**.

When it comes to Managed Print Services (MPS), your organization or department may have many objectives including cost reductions, reliability, uptime, quality, time savings, environmental sustainability, document security, integration with business processes, staff productivity, or all the above.

The workplace is also changing with an increased emphasis on mobility, cloud services, big data, analytics and social media and staff and employees have come to expect a new and different way of getting things done.

So how do you find a Managed Print Service that's right for your company?

This eGuide describes the important questions to ask when writing an invitation to tender or a request for proposal for managed print services in order to ensure that the provider, service and solution you choose are all aligned to your business objectives, meet or exceed your requirements and provide good value.

This eGuide will help you to:

1. Realize what aspects of MPS are important and in line with your business objectives.
2. Write an invitation to tender/request for proposal that will help your business to choose a capable provider that can deliver on your business goals.

Depending on your business objectives, not all the questions in this guide will be applicable to your individual situation and company, however, many, if not most of the questions will be. Use this guide as a starting point for considering how MPS can meet your objectives.

Before starting to write the tender or RFP, make sure you're clear in your mind as to what you need from a Managed Print Service.

This guide will certainly help as a starting point, but we would also advise you to engage with one or two reputable suppliers to conduct an assessment (see page 5 for more info regarding assessments). This will help define what you need.

The next step we would advise, before issuing the tender/ RFP, would be to meet suppliers to ensure they are people you would like to interact and do business with – before you take

the time to issue them with an RFP and read all their responses.

You can then use some or all the questions in the guide to write the RFP/invitation to tender document – the answers to which will help finalize who you would like to use.

It's important to remember that there is a lot to managed print services - It can help your organization transition from paper to digital. It can make staff more productive and ensure business continuity. It can help dramatically reduce cost to your business. It can make or break your document security, it can save a significant amount of time (don't think man-hours, think months and years), and can even play a small part in saving the planet.

And if you look hard, MPS can even result in smooth and efficient printing!

If you choose the right provider.

Part One:

General Questions

When you consider how much an MPS provider can do for your business, it starts to become clear as to why there are so many questions you should ask them. For example, if they're going to be involved with keeping your documents secure, it's important to know what their game plan is and how they plan to ensure no unauthorized users will gain access to sensitive information.

It's also important to note at this point that there are a lot of 'managed print service' offerings out there, some basic, some advanced, and some that aren't managed print services at all (but more like 'managed hardware services'). The questions outlined in this eGuide should help to show the different levels apart.



Question 1:

How do you define managed print and what is the scale of provision?

Managed print can mean different things to different providers. You need to find out what MPS means to them. For example, is it just about printers and consumables, or do they go as far as ensuring security and optimization of paper-heavy processes within your company?

Further to this is the scale of provision of the service in question. By asking 'What's the scale of provision?' or to reword it 'What are you capable of delivering?' you can gauge if the provider can be a 'one stop shop' for all your print and document related needs including hardware, software and services including assessment.

It also allows you to select a future-proofed provider - one that can not only meet your requirements today but can also do so in the future.

In some cases, this might be already specified by the MPS provider, depending on how rigid their service offering is. In situations where the service is more bespoke, asking the scale of provision can be a great way to find out if the service is flexible enough to fit what your organization needs.

If you know exactly what you're trying to get out of the MPS contract, use phrasing like the below, the answer you want back is a simple 'confirmed' or 'Yes'.

Confirm that you can deliver a Managed Print Service for *Print, Copy, Scan, fax and follow me functionality, including device supply, install, removal, break-fix, consumables and parts replacement, software support.*
(Replace the italics with the services you require)

Questions could include:

- Please outline the spectrum of different hardware products that you can supply and manage (eg: production devices, wide-format devices, A3, A4, multifunctional, fax machines, scanners, etc).
- Please outline the spectrum of different software products that you can supply and manage (print management software, business intelligence tools, advanced scanning automation, workflow automation, document management systems, etc).

Question 2:

What is the breadth and depth of assessment?

One of the first stages of an MPS offering is an assessment to check your current processes, culture and environment. From this assessment, it's possible to calculate the ideal employee to device ratio, volumes, Total Cost of Ownership and environmental impact. This is the bare minimum in order to effectively design and manage your **hardware provision**.

However, a more in-depth assessment might go further than this to use advanced analytics to get a real insight of your **printing processes**. This involves identifying and assessing your paper heavy processes and quantifying the level of efficiency that might be possible by optimizing or digitizing the process. This could also include a records management assessment, information governance assessment and a mail & distribution services assessment. Questions could include:

- What would we expect to understand better as a result of your assessment?
- Do you conduct a user needs analysis to uncover the functionality required by users? If so, how?
- How does each deliverable help to design a solution that meets our objectives?
- How do you conduct an assessment?
- How do you identify 'bad paper' or unnecessary printing?
- How do you quantify the results of making the process efficient?

Question 3:

What digital transformation capabilities/ digital alternatives do you have?

MPS is about optimizing your printing processes. This should include ways to transition you away from 'bad paper' or unnecessary printing. Sometimes the answer lies in making a





paper-based process more efficient, and sometimes the answer lies in doing away with the paper entirely and replacing it with a digital / automated process.

It might well be that you don't need a managed print services provider for digital transformation right now but think ahead! If your organization suddenly decides that digitalizing your processes and content is the way forward, it's best to have an MPS provider that can do this.

Some questions could include:

- Do you offer any digital alternatives to printing? If so, please state what they are.
- Please describe your approach to digital transformation, and the different steps involved.
- Do you partner with anyone to provide software solutions?
If yes, please list all the software partners you work with.

Question 4:

How flexible are your services?

If you go into contract with a provider, is there room to innovate, adapt and evolve as the business changes or grows? Or are you stuck with a service that only suits your organization as it is right now/on day 1 of the contract?



Ensure you choose a provider who not only can adapt, but one that takes on the responsibility of modifying your service provision in line with the changing requirements of your business - regardless of contract periods.

Questions could include:

- How will the supplier keep abreast of our changing requirements?
- Describe the process of managing changes relating to the service, including how changes are logged, include adding, removing and moving devices.
- How will the supplier modify the solution/service to meet changing requirements?
- How will you deal with an increase or decrease in staff numbers and ensure an optimized employee to printer ratio in every scenario?
- How will you deal with closure of existing geographic locations and the addition of new ones within our company?

- How will you deal with mergers and acquisitions?
- How will you deal with a change in business objectives, like a decision by the board to reduce or eliminate paper consumption?
- Please describe your flexibility to increase/decrease license numbers of proposed software solutions during term.

Question 5:

What's the quality of your hardware and software?

When signing any contract, you want to know what you're getting is the best service going, and that applies to the hardware and software you must deal with as well.

Ask for case studies or evidence that proves the hardware and software a provider uses is up to scratch for the job.

Some questions to ask:

- Please provide information from leading independent analysts to describe the quality of your hardware/software.
- Please describe any accreditations, certifications or awards won by the hardware or software provider.
- What is the maximum recommended page volume for devices proposed, in order to maintain a high level of service? Please explain how you work this out.
- Please describe the average level of uptime for the devices you are proposing and for all devices that are managed by you across your customer base.

Question 6:

What are your levels of uptime/SLAs?

Service level agreements help to outline aspects of the service being offered and when they're not questioned, it's possible to be hit by unfair terms, such as long or delayed fix times if an issue arises.

Every provider should be able to share numbers and service level agreements to ensure the level of service is enough for your organization.

Some questions to ask:





- Are your engineers' specialists in the brand of device that you are proposing? Please provide evidence where possible.
- Are your engineers capable of repairing devices of other brands? If yes, what brands?
- What percentage of parts are carried by the engineer on his first visit?
- How many engineers are available in the area?
- What is the level of your 'first time fix'? Please also explain how you define 'first-time fix' • What is the average time to resolution of the issue?
- What is the engineer response time?
- Please describe your escalation process when any problem arises?
- Who is the first point of contact when any problem arises?
- What percentage of all issues are resolved proactively by you? Please explain how this percentage is calculated.
- What is the level of capability of your remote support offering?
- How do we track where consumables are located when they are in the process of being delivered?

Question 7:

Service Transparency and Management Information (Reporting data)

Depending what sort of service you're looking for, you may be happy to agree on the service and let the MPS provider continually optimize your solution in the background. Optionally, you may wish to be more involved and in the decision making processes for ongoing optimization.

In either case, it is important to have good Management Information. If nothing else, this information will help you to:

- Check if the MPS provider is on track to provide the benefits/ROI (cost reductions, environmental savings, productivity gains, uptime, etc.) agreed at the start of the project.
- Allocate costs by department/location/customer.



- Use the quantified benefits (in terms of trees saved, carbon footprint reduction, cost savings, etc.) that have been realized to publicize the good work internally within your company.
- Use insights provided to make decisions to optimize the solution or optimize internal processes that use a lot of paper.

If you need certain information to report back to the organization, and to ensure ROI on any MPS contract, then you need to ensure the MPS provider is willing to provide this information.

Here are some examples of the sort of management information you might want, and the questions you could ask:

- In what form do you provide management information? Please explain why.
- Do you offer any software or web based platforms that allow me to access live management information on demand? If so, how?
- Does the platform allow for 'what if' data modelling to visualize the impact of possible changes to your solution?
- Does the platform allow you to drill down by department or user? If so, how?
- What data does the platform allow you to visualize?
- Does the platform allow you to identify and analyses trends in paper usage? If yes, how?
- Please confirm if your management information contains reporting on volumes.
- Please confirm if your management information contains reporting on print type (mono, dual sided, applications used to print from, etc).
- Please confirm if your management information contains reporting on print volumes by department.
- Please confirm if your management information contains reporting on print volumes by user.

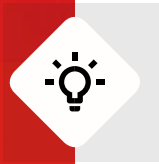
Question 8:

Outline how you can apply innovation to the service and how you can ensure our service is future-proofed.

Things change over time and if you're looking at entering a 3 or 5 year contract with an MPS provider, you need to be sure that there's room to move and room to innovate.

This isn't an easy question for an MPS provider to answer but if they can show their experience in areas other than pure print, for example, digital transformation, print and document security, document management etc. then they have a better chance of adapting your service for the future.

Docutech have always believed that if the service is the same at the end of a contract as it was when it started, then we haven't done our job properly! Innovation is key to any organization and this applies to print and document processes as well.



Some questions could include:

- How do you ensure we are using the best possible solution in order to achieve our business goals?
- How do you discover and meet the evolving needs and requirements of our company?
- How do you stay on the cutting edge of business technology?

Question 9:

How can you assist with change management?

As mentioned, regarding innovation, things change (hopefully for the better) and it's not unacceptable to ask how an MPS provider can assist with change management.

If the size of the team doubles, how does the service change to deal with this? What support is in place to ensure that everyone in the business understands change to current systems.

Unfortunately, people often don't like change so knowing that your MPS provider can provide a bit of protection and help with change management can be a huge relief. Some questions can include:

- How do you get buy-in from the end user for your solutions?



- How do you ensure that change is managed effectively?
- Please describe your change management team.
- How does the roll out of the new solutions work? Describe with rough timeline.
- Do you provide any training? If yes, please describe the training provided.
- Does this training include standard or advanced functions of the solution?
- Do you provide collateral/desk drops of how to use the new solution?

Question 10:

Do you rely on any third parties to provide your service?

A lot of MPS providers will work with a third-party supplier for services.

While this shouldn't affect the service offered, it's good to know exactly what the service includes and who all the suppliers involved are.

Questions can include:

- Do you rely on any third parties to provide your service? If yes, please list the third-party providers used.
- What is the scope of their service provision?
- Who is responsible for the overall service?
- Who would our point of contact for their part of the service be?



Question 11:

Can you collaborate with third parties/ integrate with existing systems?

You may already have some systems or suppliers in place, so checking as to whether a future MPS provider can collaborate and integrate with these is a good idea.

- Do you have track record of systems integration? If so, which systems?

- How does your solution integrate with [insert name of your solution here]?

Question 12:

What level of document security and data privacy do you offer?

Data security should be at the forefront of any MPS strategy, especially considering GDPR coming into place. The MPS providers that you speak to should be able to give you in-depth details about how they keep data secure and the levels of security that are put in place.



For example, in line with IT security, an MPS provider might agree that all managed print fleet devices must be configured with strong passwords for administrator accounts and that the managed print fleet Hard Drives should be encrypted and physically secured.

Questions could include:

- Please tell us about the on-board security that comes with the hardware solution.
- Does your security include:
 - Image overwrite
 - Encryption
 - Whitelisting/blacklisting
 - Pin/card based printing
- Please tell us if the security elements of your solution have been approved or provided by any major security organization?
- How does your solution help to comply with GDPR?
- Can your solution automatically detect and redact sensitive information that is copied/printed/scanned? If so, how.
- Can your solution automatically alert the security officer if sensitive information is being printed/copied/ scanned? If so, how.



Question 13:

Scanning and digitization?

A good scanning and digitization strategy is essential, especially against the backdrop of increased mobile workforces, GDPR and digital transformation - even if you are

not “going digital” today, properly scanned and organized documents will stand you in great stead for the future.

Please note, for the purposes of this document, we are defining ‘digitization’ as the conversion of paper to digital formats (eg: scanning) - not to be confused with ‘digitalization’, which not only includes the conversion of paper to digital formats, but also includes a transformation to a digital way of working (eg: workflow automation). This point deals only with the former, which should be included within your MPS strategy.

Some questions could include:



- How do you support/account for digitization of paper documents within your solution?
- How do you support the digitalization of existing and historical paper records within the company - please describe the process.
 - Is this done on site or offsite?
 - Do you offer a paper audit? If so, how does this work?
 - How do you quantify the benefits of embarking on a digitization of historical paper records?
- Please describe your recommended scanning hardware provision.
- Please list the online repositories and Document Management Systems that you support in this respect.
- Please describe your recommended scanning software provision.
- How do you ensure documents are scanned with minimal effort/minimal number of manual steps?
- Can we scan directly from the MFD to online repositories like Dropbox, Google Docs and others?
- How do you ensure scanned documents are stored in the correct place?
- How do you ensure that scanned documents are named correctly?
- How do you ensure that scanned documents have the correct metadata?
- What format do you think would be suitable for us to save scanned documents in and why?
- Will documents be text searchable?

- How will you ensure that scanned documents will be GDPR compliant in terms of:
 - Data subject access requests
 - Security and access to private data

Question 14:

Can you support a mobile workforce?

The world is moving forward and more and more people are choosing to work away from the office. It's a trend that isn't likely to slow down, so knowing that your MPS provider can offer mobile printing services and document management to ensure remote working is possible is vital. Some questions could include:

- How do you provide secure access to documents and information from outside the office?
- How do you support the capture of data in various formats from outside the office, and how are these securely transferred back into the workplace?
- Please describe how you will enhance and improve our mobile strategy.
- Please describe your recommended mobile print solution.



Question 15:


Demonstrable track record of client success/reliability

Before working with any MPS provider, you need proof that they can deliver what they're offering. Ask for evidence and proof sources that show a track record of client success and reliability - especially in your industry.

Most MPS providers will have a list of case studies available to share.

Some questions can include:

- Please name three customers in our industry.
- Please state the results that have been achieved for three of your customers - please quantify the result in terms of money saved, man hours saved, trees saved, etc.
- How many customers do you have in total?
- For how many of these customers do you manage the full output fleet?

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- Would it be possible to have references for three customers?
 - Would it be possible to visit one of your customer sites?

Question 16:

Company culture and heritage



As well as the general service offering, it's always good to get a flavor for who the company are that you're potentially going to work with and what their company history looks like - are they new to MPS? Is it something they've done for years? What's the average tenure of account managers? How stable are they as a business?

Getting a general feel for the company can help give some confidence as to whether they are the right company for you to work with. Some questions include:

- For how many years has your company provided document solutions?
- For how many years have you provided MPS?
- Have you won any awards? If so, please state.
- Have you conducted a customer satisfaction survey, if so, when and what were the results?
- What's the average tenure of account managers?
- How stable is your company as a business?



Question 17:

Billing and Invoicing

Hidden costs and invoices are a fast way to annoy the finance team and be left feeling annoyed and potential regretful of your decision in MPS partner. Make sure there are no hidden costs and find out what the process is for paying the bills.

Questions to ask include:

- Do you provide a single itemized invoice or multiple invoices for the hardware and software provision?
- How do you ensure the accuracy of pages billed?
- Are there any hidden charges that are not immediately apparent?

Part Two:

**Questions you should
ask, based on specific
business goals**

The questions in part one cover some of the general things that you should ask any MPS provider to get a feel for their service and who they are as a business. The areas and questions covered in part 2 are more specific to the different business goals you might have and relate to reasons that you might be looking for a new managed print services provider.



Cost Reductions

Cost reduction is a common goal amongst organizations investing in managed print services. It can be done through several methods such as optimizing the print strategy, identifying where heavy print occurs and eliminating it and digital transformations.

Where your goal is to reduce overall print costs, make sure to outline this expectation and ask some of the following questions:

- What is your average cost reduction for your customers?
- How will cost reductions be measured? How do you report on cost reduction?
- How will you ensure costs are reduced?
- What tools and software do you use to reduce and control costs?
- How will you help us manage the cost of printing?
- Please explain the cost of color page printing and define the criteria for a color page vs a mono page.
- Please provide some examples of how you've reduced printing costs in the past.



Production/print-room environments

Your print room or production environment might have a heavy impact on the costs associated with print. When choosing an MPS provider or writing the RFP, consider what questions to ask for the print room, for example:

- How will you optimize the document infrastructure for the print room or office floors?
- How will you gain a full understanding of the working environment, current processes and user requirements in the print room?

- How can you reduce costs of the print room/ production environment?
- Please describe the recommended hardware and software solutions for our production requirements, including any online or offline finishers.



Time savings

Time is an asset for any employee and printing and print processes can be time consuming. Based on this, saving time might be one of your goals from managed print services.

While an MPS provider might not be able to tell you straight away where time can be saved, they can at least explain where they would look and what they would assess to work out where time can be saved.

One question to ask might be:

What's your process for reducing print times and saving employees time?



Environmental sustainability

Environmental sustainability is important for so many reasons and every organization have a part to play.

If your organization is striving for more environmental friendly printing solutions, be sure to ask the following:

- Do you have solutions that address environmental sustainability goals? If so, please explain what solutions you have.
- Do you have any case studies/examples of where the environmental impact of printing has been reduced?
- How do you measure the environmental impact of printing?
- How do you support a cultural shift in the mindset of your customers towards a more sustainable and environmentally friendly attitude towards printing?

There's a lot a reason that you might be considering a new Managed Print Service from coming to the end of your current contract to growth in the company to a change in business objectives.

Whatever the reason, hopefully this guide has helped to outline the questions you might ask in an RFP or invitation to tender for MPS.

If you're at the stage of writing your RFP, remember to make sure you're clear in your mind as to what you need from a Managed Print Service and consider meeting suppliers before you issue them with an RFP.

To learn more about the questions to ask in the RFP process, the Managed Print Services that Docutech provide, or to find out how we can help you, **get in touch**.

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