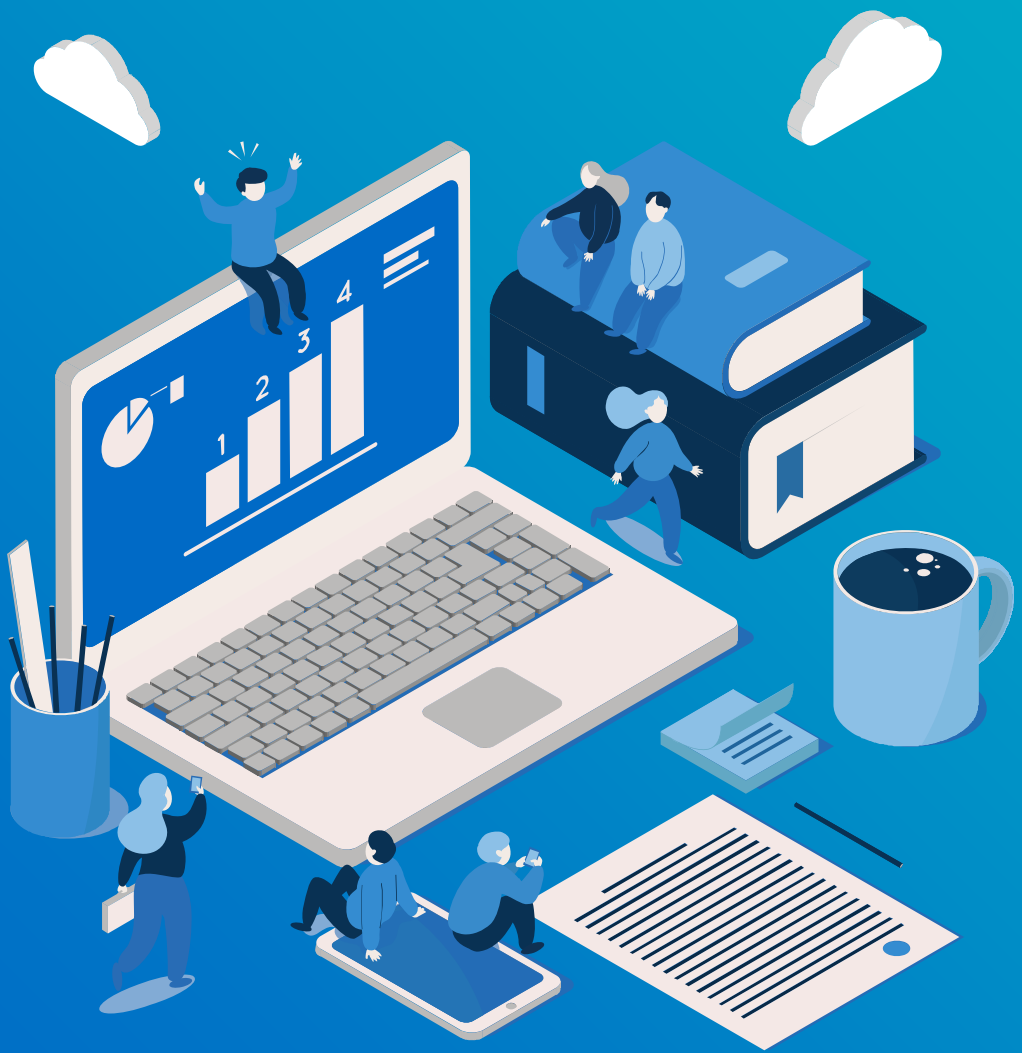
Software2

RFP Template for Application Delivery Solutions



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'Request for Proposals' template for Application Delivery solutions...

A software-buyers guide to Application Delivery, Virtualization, VDI and DaaS solutions.

Are you building an RFP for an application delivery solution such as desktop virtualization (VDI), application virtualization or a remote desktop solution? This template and guide will help you create your RFP and make sure you've covered all the possible requirements.

Whether you're looking to VDI, application virtualization, remote desktop architecture, an alternative to Citrix and VMware, an application workspace, Desktop-as-a-Service (DaaS), or any other software deployment technology, this RFP template will help you consider and evaluate all the requirements you'll want the proposed solution to meet.

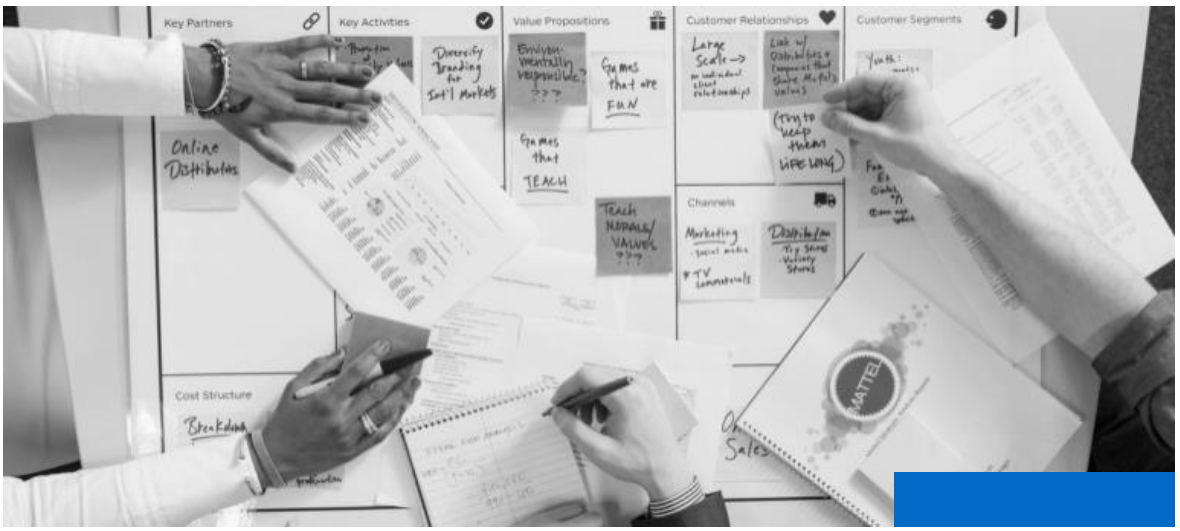
When it comes to requesting proposals for an application delivery or virtualization solution there are many elements to consider, including how the proposed software meets not only your technical requirements, but also your higher-level *business,* commercial or end-user requirements.

This e-book will give you an overview of the requirements you'll want to include for any successful virtualization, VDI or application deployment project, as well as a clear format and structure in which to provide them.

At the end of this template you'll find a full checklist of possible requirements and sample responses, a must for any virtualization project like this!

Getting started...

Define your requirements



In order to get a software solution that meets your organization's needs, you first need to set out a clear list of requirements that the project will fulfil, whether they're a 'must have' (called *essential* requirements) or a 'should have' (known as *highly desirable* requirements).

Once you have all your requirements for the proposed application delivery or virtualization solution laid out, you should collate them all into what's known as an RFP – a request for proposals – and send this to your virtualization or application delivery provider.

Here's how to approach any RFP:

1. **Do your research** – this will involve internal research to define the outputs of the required solution amongst key stakeholders
2. **Identify providers** – Search for software vendors who can meet your requirements and get to know which technologies are available on the market.
3. **Create your RFP** – This template will help you build your RFP in a way that ensures you get a solution to meet all your organization's needs

Information about you...

Provide information about your company

The start of any RFP should include important information about your company, as well as key dates, project outputs, submission guidelines, your existing application delivery solution and the main drivers for change. Here's the format of what you should be including in the opening section of your application delivery RFP:

01

RFP background

What's the main reason for requesting proposals from virtualization and delivery providers? Why are you looking to change and improve your existing EUC (end-user computing) environment? Think of this as an executive summary for your RFP document...

For example:

"Our organization is looking for a software delivery solution to replace our existing Citrix XenDesktop environment. We require a new virtualization solution to deliver all our end-user services, namely our software estate, on-demand across multiple locations in a consistent and user-friendly way. The proposed solution should deliver Windows applications to both Windows and non-Windows devices, and should also support the delivery of Mac software to Apple devices."

The RFP background will be one of the first things that the vendors read. It will set the tone for what they should expect in the rest of the request, and indeed it sets their expectations for what you want the new application delivery solution to do.

02

Your organization

Give your chosen software vendors important background information about your company, to enable them to tailor the responses appropriately. This should be a high-level overview and could include any of the below as an example:

- Where you're located
- How many end-users (or employees, or both) you need to support
- What types of device are common across your organization
- Whether you have overseas or remote workers
- Whether you have multiple locations to which software needs to be deployed

03

Project/RFP timescales

Lay out the key deadlines that you need your respondents to know in order for them to successfully submit their proposals. This could include RFP intent, submission, decision and implementation dates.

04

Incumbent application delivery environment

You should give as much information as possible as to what your current solution is, what it does, and what the new proposed solution will either replace or integrate into.

You could list any key challenges or blockers with the current solution, in which it isn't enabling you to achieve what your organization wants to achieve. This could be an overview of why you aren't able to reach key IT strategies with the current setup such as BYOD deployment for example. Some technical information as to how you're delivering applications would also help to describe the situation to respondents.

05

Summarized requirements

Using a concise list summarize everything you expect from both the replacement software solution and the vendor providing the solution. This will be a summary of a later section of the RFP document, in which you fully detail what requirements are essential and what are highly desirable.

We have included a full checklist of requirements later in this template for you to consider when building an RFP for application delivery solutions.

06

Submission guidelines

Are there any specific guidelines that respondents must adhere to? If your company has a set RFP framework or legal requirements, you should make sure those are well-communicated to all companies who wish to submit a proposal.

Most importantly, this should highlight how to submit the actual Request for Proposal and set expectations for how the process will work. Think of this as the ‘guidance notes’ to all vendors who will respond to your request.

Information about them...

Your chosen providers' responses

The next section makes up the bulk of your RFP and will be of most interest to those responding. This is the part to which chosen vendors will write their responses, addressing your key requirements and providing information which illustrates how they will be a good fit for your requested solution.

Before reading this, you'll have already built your internal business case for doing anything at all, got senior buy-in and gathered your full list of requirements from different parts of the organization. The requirements should then all be collated into various categories to which the application delivery or virtualization vendors will respond.

01

About their company

The first level of qualification you'll want to do is to check whether the responding organization itself meets your requirement, before you consider their software solution's features and how it fits with your requirements.

You should ask for information such as:

- company history
- its location
- employee information
- relevant financials
- customer base
- key partners

You may also want to know the company has policies for things such as data security (and GDPR if based in the EU), corporate and social responsibility (CSR), anti-slavery and corruption.

The purpose of knowing this information is for you to be sure that the company with the successful response is credible, reputable and understands both your use cases and challenges faced by your industry, specifically when it comes to application delivery and virtualization.

02

Meeting your requirements

In this section you'll describe in detail all your requirements for the proposed virtualization or application delivery solution. You'll want to provide vendors with a list of requirements to which they can respond, and you might want to split these up into those that are essential/mandatory and those that are highly desirable.

Your list of requirements will need to illustrate everything that you need the proposed software to do, including technical and end-user requirements. Make sure you consider every avenue of application delivery and deployment, and make sure you include it in this section. If you want to make sure that the replacement solution does something, include it in this bit of the RFP!

For example...

You might want to know what OS or device types the solution supports, what delivery methods it integrates with, how it connects with your existing Active Directory environment, how it delivers Windows software to non-Windows devices, what specific software titles can be virtualized, the infrastructure it needs to work with, cloud vs on-premise deployment, managed vs BYO devices and more!

Think about everything to do with your desktop, software and end-user estate, then craft a series of requirements to fit the bill. This section will be scrutinized by all responding vendors, and as such it's probably one of the most important parts of any RFP.

At the end of this e-book we've put together a full checklist of the requirements you'll want to make sure you've considered for any application deployment project like this. Take a look and see what requirements to include in your very own request for proposals/request for information.

To make it easier for you to track the requirements and for your vendors to respond to them, you might want to categorize your requirements into the below, as an example:

- Application delivery
- Virtualization
- Integrations with 3rd party technologies
    - Microsoft SCCM/App-V
    - Citrix, Vmware or Parallels
    - SaaS and web apps
    - Mobile app stores
    - Mac delivery solutions such as Jamf Pro
- Integration with existing infrastructure
    - Microsoft Active Directory
    - Open LDAP connections
- End-user requirements
    - App store access
    - Accessibility
    - Performance of software
    - Consistency across devices
    - BYOD support
- Reporting
- Deployment and management

03

Their software solution

Once you've built your list of actual requirements for vendors to respond to, the next thing you'll want to do is understand the software solution from a holistic perspective. This is to be sure you're comfortable with what you're investing in, not just in terms of application delivery, but strategically and from a business point of view, to minimize potential risks in the future.

You might want to think about some of the below points, for example:

- The product roadmap, strategic direction and future planning
- Disaster recovery procedure(s)
- Service Level Agreements (SLAs) for uptime
- Network diagram for the full solution
    - Is it an infrastructure-intensive solution requiring additional hardware or changes to existing network?
    - Is it a more streamlined solution that requires only a few servers to support it?
- Is there an extensive analytics suite to help you get management information to make strategic decisions?
- Does the vendor work with key technology partners?
- Does the team behind the implementation and roadmap have good experience with application delivery in your particular industry, for example higher education?
- How mature is their software solution?
- Does the solution and training cause 'vendor lock-in'
    - Does it prevent changes or integrations to be made to other solutions in the future?

04

Implementation and support

By this point of your RFP, you'll want to get an understanding of the details. Knowing what's involved after signing the contract and purchasing the technology is a very important part of the whole software solution and should not be overlooked.

After choosing the successful response the next steps for any application delivery, VDI or DaaS solution is the implementation of the software itself. This process is something that you'll want to make sure happens seamlessly and that you're provided with all the support and project management throughout the process that your organization needs for it to be successful.

You'll also want to consider what the support model looks like after the solution is 'live' at your organization, and what is required from the various roles within your IT department on an ongoing basis.

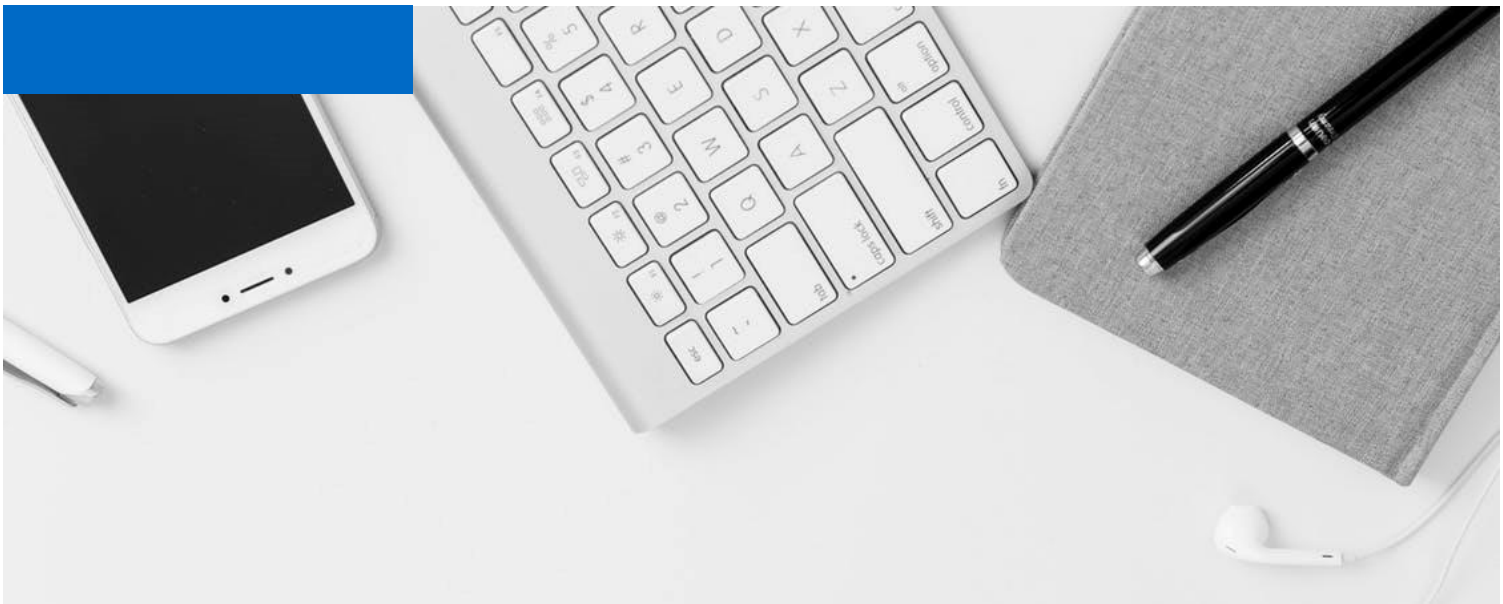
Make sure you consider some of the points below, for example:

Implementation

- How long will it take to implement the solution?
- What does your implementation process look like, perhaps on a week-by-week or month-by-month basis?
- How does the planning process work for implementing the application delivery system?
- How does the solution deal with existing 'live' and business-critical environments?
- Is there any downtime or risk and what is done to mitigate those things?

Support

- Who is the account management team and what is their experience?
- Does the support team know how IT support works in your industry?
- What is the support process?
- If the solution includes software from technology partners, how do we get support for those particular software delivery products?
- What is the average response time to tickets?
- What is the satisfaction rate of ticket responses?
- How do upgrades work?
- How does the vendor keep customers notified of important updates, roadmaps and key product news?
- Does the vendor host customer get-togethers or user groups where we can come together and share best practices with other users in our industry?



05

Pricing, licensing, contracts and billing

The penultimate stage of your RFP is probably what any procurement team will be most interested in. By now, you'll have designed your request for proposal to elicit responses to meet your technical needs, and you'll be happy that you're choosing both the right vendor and the best software.

Now you need to know everything to do with how your application deployment solution is priced and licensed, and what those models look like not only on day one but on an ongoing basis too. This section is designed to check the affordability of the proposed solution.

You'll want to know information such as:

- What is the pricing model?
- Is it licensed per user (student FTE count for Higher Ed institutions), per device, concurrently, perpetually, annually...?
    - There are many different pricing and licensing models for software delivery, virtualization, VDI and DaaS solutions, so you'll want to be sure that the proposed solutions fit what you're looking for.
- How does billing work?
    - Are there any specific terms?
    - How often does all this happen?
- What happens if we increase our number of end-users and what's the agreement for this contractually?

06

Demonstration of past performance

Finally, you'll want tangible examples of the vendors' solutions being used by other companies or organizations who are both a similar size to yours (in terms of end-users and number of locations) and in the same industry.

This might be partly covered by one of the previous sections of your RFP, but this gives you the opportunity to drill down in much more detail and get the information you want to be comfortable you're making the right decision.

This is to ensure that your exact use case can be satisfied by the proposed software and that there are positive references and testimonials to support that. You may also wish to find an existing customer who is close to you geographically, and the vendor should always share with you the details of those people for you to contact to get your own independent reference.

They should even set up a site visit for you to go and speak with another one of their customer's IT teams to learn how they're delivering software apps to their end-users and find out more about the solution and how it works.

Be weary of any vendor who is hesitant to share with you any information about their customers and use cases in your industry. You should request site visits and several key references so you can be sure the solution will meet your requirements.

Conclusion

Building your request for proposals

Now that you have built your business case for implementing a new software solution, identified exactly what you need your new virtualization and application delivery solution to do and presented your requirements, it's time to write your template and publish it.

You should have already identified the vendors who you'd like to respond to your RFP. For application delivery solutions, you might look to vendors who supply various technology solutions such as:

- Unified Application Delivery
- Application Workspaces
- Enterprise App Stores
- Desktop Virtualization (VDI)
- Application Virtualization
- Desktop-as-a-Service (DaaS)
- Remote Desktop solutions

You should understand the higher-level benefits and use cases for each of these technologies before deciding which type you want responses for, or indeed a combination of them all!

Now it's time to write everything up and get all the relevant internal departments to check and confirm that their individual requirements have been captured and correctly articulated. Once that's complete, you're ready to publish and start seeing responses fly in for your new application delivery system.

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Requirements Checklist

Category

Application virtualization

- ❑ The system shall have the ability to virtualize ESRI ArcGIS
- ❑ The system shall have the ability to virtualize IBM SPSS
- ❑ The system shall have the ability to virtualize Maple
- ❑ The system shall have the ability to virtualize MathWorks MatLab
- ❑ The system shall have the ability to virtualize NVivo
- ❑ The system shall have the ability to virtualize AutoCAD
- ❑ The system shall have the ability to virtualize the Microsoft Office 365 suite
- ❑ The system shall have the ability to virtualize the Adobe Creative Cloud suite
- ❑ The system shall have the ability to virtualize Revit
- ❑ The system shall have the ability to virtualize R Studio
- ❑ The system shall have the ability to virtualize R Statistics
- ❑ The system shall have the ability to virtualize SolidWorks
- ❑ The system shall have few limitations on the type of application that can be packed, virtualized and deployed
- ❑ The vendor shall provide a list of all applications that have been successfully virtualized
- ❑ Describe how applications are patched and updated
- ❑ Describe the change management process (for service or client updates)
- ❑ What is the process of managing the application lifecycle?
- ❑ Ability to deploy Windows apps to Windows devices as well as macOS and Chromebooks
- ❑ The system shall deliver virtualized applications that run locally on a Microsoft Windows operating system
- ❑ Detail the limitations on the type of application that may be package and deployed through the proposed system

End-user access

- ❑ The system shall provide a web-based portal to work with popular browsers such as Firefox, Internet Explorer, Microsoft Edge, Safari and Chrome
- ❑ The system shall be accessible on a variety of Operating Systems, including Windows, macOS, Chromebooks, iOS and Android
- ❑ The system must be able to deliver native and remote applications to macOS/OSX
- ❑ The system shall be compatible with multiple device types
- ❑ Describe how the solution performs under restricted-bandwidth or offline environments
- ❑ The system shall enable users with self-service access to applications
- ❑ The system shall be customizable or 'brandable' with our company branding (university or college logos, colors and typefaces)
- ❑ The system shall be compliant with any relevant Accessibility Acts or meet minimum guidelines for accessibility purposes
- ❑ Have you completed a Voluntary Product Assessment Template (VPAT) to self-assess the solution's accessibility?
- ❑ Provide screenshots of the application delivery solution or app store's user interface, for each of the devices supported
- ❑ The system shall have a web-based interface for all end-user access
- ❑ The system shall have a web-based interface for all IT management access

Deployment and installation

- ❑ The system shall integrate with AD (Active Directory)
- ❑ What time of authentication methods does the web interface support? [SAML2, Shibboleth, CAS, Kerberos, Active Director, Open ID etc.]
- ❑ The system shall have the ability to restrict access to applications as per access privileges in Active Directory, such as User, Group, Machine, Device Type, Ownership or Location
- ❑ Describe how the system handles delivery of applications to devices that are not institutions or company-owned, for example students' personal laptops and BYO devices
- ❑ The solution shall have the ability to provision applications to devices off campus
- ❑ Provide information as to what controls can be applied to prioritize the delivery methods of applications
- ❑ Provide details as to how the system shall deploy applications to Apple devices, including both iOS and macOS
- ❑ The system shall support Single Sign On through Shibboleth/SAML2
- ❑ Describe how new users, groups or roles are provisioned in the solution [e.g. through LDAP integration, a one-time import, or provisioned by administrator from within the software]

Infrastructure and implementation

- ❑ What single points of failure are in the solution, if any?
- ❑ Provide architectural diagrams detailing what is required for the solution on-premise
- ❑ Detail what servers, OS versions and databases are required
- ❑ Provide information as to how the solution scales as the number of devices increases
- ❑ Provide information as to what virtual servers can be utilized with the system
- ❑ What failovers or load balancers are required to avoid all downtime?
- ❑ Provide information about the proposed implementation or project team, including their exact roles and the curriculum vitae of each
- ❑ Detail what web browsers the system is compatible with
- ❑ Provide a list of current implementations of a similar size to our organization, and also within the Higher Education sector

Ongoing management

- ❑ Does the solution have an extensive set of administrative tools?
- ❑ What are the user access roles available within the administration of the system?
- ❑ The system shall provide different levels of access to various administrative users
- ❑ The solution shall integrate with Microsoft System Center Configuration Manager (SCCM)
- ❑ The solution shall integrate with our existing Microsoft App-V packages
- ❑ The solution shall integrate with our Jamf Pro environment for delivering Apple applications to managed Apple devices
- ❑ The solution shall integrate with our existing VMware Horizon infrastructure
- ❑ The solution shall integrate with our existing Citrix XenDesktop/XenApp (Citrix Virtual Apps and Desktops) infrastructure
- ❑ The solution shall integrate with Parallels Remote Application Server (RAS)
- ❑ Describe the reporting functionality available within the solution
- ❑ The system shall provide management reports detailing key metrics such as logins, application usage, peak concurrency, locations accessed and service uptime
- ❑ In what format can analytics data be exported from the system?
- ❑ The solution must be able to share data reports with management

General application delivery

- ❑ The vendor must have key support offerings including online knowledge bases and support forums
- ❑ The app delivery solution must be able to prioritize delivery methods based on context, e.g. user device, location, on-domain vs BYOD, OS etc.
- ❑ The system must be able to share lists of applications to students and staff, for example via our Virtual Learning Environment (VLE) or via email

- ❑ The vendor shall host customer events or user days free of charge, in which other organizations using the technology from within our industry (higher education) come together to discuss best practices
- ❑ The system must have comprehensive documentation
- ❑ What does the training process look like during and post implementation?
- ❑ The vendor must provide the length of time they have been in business of providing application delivery and application virtualization solutions
    - ❑ Specifically within Higher Education institutions
- ❑ The system must support the delivery of direct downloads and secure downloads for software installation files
- ❑ The system must support SaaS or web applications as a delivery method
- ❑ The system should enable the user to search the library of applications in an intuitive user experience
- ❑ The app store component of the system should be filterable with pre-defined and custom categories
- ❑ The end-users must be able to 'favorite' their most-used applications
- ❑ The system must be able to unify application delivery methods and aggregate them all into a single point of access for both IT administrators and end-users
- ❑ The user experience must be seamless with the user getting the application 'on-demand', without having to consciously choose a delivery technology.

Download this checklist in an editable format

Access this requirements checklist as a fully-editable Microsoft Excel file, where you can categorize and prioritize your own applications delivery requirements.

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