

Expert



UCaaS

RFP

Template

 **SWARTZ**  
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SAMPLE

# UCaaS RFP Template Instructions

## Overview

This template must be customized to match your environment. If you have used the Existing Technical Environment Assessment and the New Solution Requirements worksheets, you will have the information needed to customize the template to your needs.

This template provides a comprehensive framework for your requirements. However, it is a starting point. You should adjust it as needed to reflect the needs of your organization.

Where information must be filled in, the document indicates this with brackets, highlighted in yellow. Here is an example:

All questions about this request for proposal, including any requests for clarification or further information, should be addressed to [Name, Company Name], via email at [email address].

The brackets surround the section that must be filled in and indicate the information needed, or provide an example of the information.

## Cover page

1. Remove or revise the first two pages of the document to add your company information.
2. Add your logo at the top of the page where it says “Logo Goes Here”.
3. If you prefer, change the wording from “Communication Technology Solution” to whatever you wish.
4. You may want to add the date the RFP is issued and/or the date proposals are due to the cover page.

## Table of Contents

1. Skip the Table of Contents for now; we’ll come back to that later

## Overview Section

### Overview

1. Replace “(Organization Name)” with the name of your organization. Be sure to include the parentheses. If you need assistance, see instructions [here](#).
2. Replace “(Organization Initials)” with the initials or short description of your organization, if you wish. Be sure to include the parentheses. If you need assistance, see instructions [here](#).
3. If you don’t want to use initials or a short name, Replace “Organization Initials” with the name of your organization. If you need assistance, see instructions [here](#).

4. In the Overview section, insert two to three paragraphs that will give suppliers an idea of what your organization does and its values.
5. TIP: Your organization's web site probably has an "About Us" section where you can get good information to put in the Overview section.

#### Current Environment

1. Paragraph 1: Fill in goals for project (from your Project Goals Worksheet). Add or delete the number of goals as needed.
2. Paragraph 2: Fill in current system information (from your Communication Technology Needs Assessment: Existing Environment)
3. Paragraph 3: Fill in information about additional system components (from your Communication Technology Needs Assessment: Existing Environment). Add or delete from list as needed.
4. Paragraph 4: Fill in number of sites and list each one. (from your Communication Technology Needs Assessment: Existing Environment)
5. Provide a diagram of the existing voice network as Appendix A (from your Communication Technology Needs Assessment: Existing Environment)
6. Paragraph 6: Describe how sites are tied together. If you have a single site, delete this language.
7. You will need a diagram of your data network to include as Appendix B (from your Communication Technology Needs Assessment: Existing Environment)