XYZ Inc

RFP Template: Services & Customer Support

Prepared For: Sales Teams responding to RFP / RFQ

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# Services Overview

1. Do you have an overall Services methodology?

XYZ Services (Professional Services, Training, and Support) employ a unified approach – the Rely Methodology.

There are four main components:

Architect and Plan: Collect data, assess readiness, architect a solution, and plan implementation.

Implement and Migrate: Deliver a turnkey implementation and migration, or offer support for implementation and migration to our customer IT teams.

Operate: Integrate XYZ products into a wider network ecosystem and/or customer operations environment.

Optimize and Audit: Optimize results and set up ongoing auditing of Key Performance Indicators (KPIs) such as compliance.

Customer satisfaction is maximized and their Key Performance Indicators are optimized by XYZ continuity, collaboration, and quality across all Services.

1. Are there interdependencies among XYZ Services offerings?

The Services groups focus on overlapping aspects of the Rely methodology:

Professional Services: The Professional Services group helps customers Architect and Plan an XYZ solution, Implement our products, and Optimize results.

Support: The Customer Support team helps customers Implement our products, Operate the solution, and Optimize results.

Training: The Training team helps customers understand how to Architect and Plan an XYZ solution, Implement our products, and Operate the solution.

# Professional Services

1. How long does a typical implementation take?

There are many facets to this kind of project. We estimate days of Consulting time based on our experience on similar projects and the information provided at the time of the RFP. A more specific SOW can be developed based upon follow-up conversations with the customer technical and project team.

1. During an implementation, do you utilize a project manager?

Yes. For projects less than (15) days in length we provide Project Administration which is simply initial project coordination including setting up the kick-off call, coordinating appropriate resources and then hand-off to the XYZ PS Engineer and customer project team to execute.

For projects longer than (15) days XYZ recommends a Project Management resource on both sides. XYZ estimates a Project Management resource to be (10 – 15) percent of the estimated consulting time. The XYZ Project Manager performs the activities described above as well as facilitating customer meetings, status reporting, risk management, scheduling, and other project-related activities.

1. Are there any lead-time requirements between contract execution and project kick-off? If so, please explain.

XYZ works on a 4 – 6 week lead time on projects upon contract (SOW) execution and acceptance of a Purchase Order (PO). XYZ uses commercially reasonable efforts to schedule sooner based upon resource availability and customer requirements.

1. Please describe in detail your implementation team structure. Include experience, education, professional training, technical certifications, and professional experience (please include separate attachment if necessary).

XYZ Professional Services has an seasoned team of Engineers with between (2 – 7) years of XYZ Professional Services experience designing, deploying and migrating customer environments to XYZ solutions and (7 – 20+) years of networking industry experience.

There are over (25) Professional Services Engineers currently on staff across North America in roles ranging from Principal Engineer to Engineer. They hold certifications such as XYZ technical certification as well as other industry-leading certifications from Microsoft, Lucent/Alcatel, and Cisco.

1. Common issues/obstacle we could face when implementing - do you provide an escalation plan if necessary?

XYZ Professional Services works closely with your project and technical team to delve into your specific environment and tailor a migration plan to facilitate a successful migration.

Working with the XYZ Project Manager and Engineer the appropriate planning will be put in place including the migration plan, back-out plan, problem resolution/escalation plan to ensure each group within your structure and XYZ in preparation for any planned implementation timeline agreed to by both parties.

1. Do you subcontract any of these implementation services?

XYZ Professional Services does utilize highly trained and very specialized sub-contractors for engagements when project requirements and timing requires it. These Engineers have the same qualifications as internal XYZ Professional Services Engineers and have access to the same resources inside of XYZ to facilitate project success.

1. What is your company's change management policy and how is it deployed? Please include a copy of your change management document.

XYZ Professional Services works to integrate with your Change Management processes. The attached Migration Plan document describes our approach to this.

1. Please describe in detail your largest implementation that is in production to-date (include any lessons learned).

XYZ has completed the conversion of over 5,000 customers to XYZ solutions ranging from small to very large installations. To-date, we have several customers with over 350 appliances globally. The largest single customer implementation is over 400 appliances for which they have implemented networking solutions for (VoIP) for the internal and external networks. By consolidating to a single solution, they replaced about 6 methods of previously doing networking on (ABC, ConnectMe Router Interface, Firewall Interfaces, and 3 other competitive solutions). Networking services were consolidated onto XYZ from 3 different systems including competitive solutions. This customer has been in production for 4+ years and continues to expand with XYZ products.

Lessons Learned (Generic to any migration)

Very large implementations spanning multiple countries, locations, organizations and staff requires a Customer or XYZ provided dedicated Project Management Support

It can be done with keeping the data and functionality.

There is no standard data export format. Every migration is different

The structure of some NETWORKING SERVICES/ systems often delivers obsolete data such as unused networks. This must be cleaned during the import process.

Some NETWORKING SERVICES/ systems allow entry of illegal data. Migration tools need to identify this and act on it. (i.e. default gateway not within the subnet).

No other application has the same look and feel as the legacy product. Train people on the new technology and GUI

Migration = People + Process + Tools

1. Do you have a standard methodology for deployment of your solution for a client of our size? If so, please provide.

XYZ has done thousands of deployments for the largest enterprises in the world. A standard methodology is used for all customer deployments.

# Training

1. What training classes does XYZ offer?

XYZ provides several training options based on customer needs.

* **Basic Configuration Class:** This XYZ OS Configuration Class () is a comprehensive 3-day hands-on instructor-led course delivered live or via an online session and conference call, with student and instructor interactions. It builds a working knowledge of how to configure and manage XYZ network appliances running OS. Forward and reverse mapping zones, network and zone creation, NETWORKING SERVICES, ranges, fixed addresses, grid management, system & protocol level monitoring, and system level management will all be covered.
* **Advanced Administration Class:** The XYZ Advanced Administration Class () is an intensive 2-day hands-on instructor-led technical course delivered live or via an online session and conference call, with student and instructor interactions. The class explores some of the advanced architectural and deployment options of the OS appliances.
* **Advanced Troubleshooting Class**: The XYZ Advanced Troubleshooting Class (ATC) is a 2-day hands-on instructor-led technical course delivered in live (not available in online format), and is required for anyone offering support for XYZ devices, or anyone that would like to be able to troubleshoot OS, NETWORKING SERVICES, and/or issues.
1. Where is the training located?

The training can be done on-site, remotely, or at the XYZ training center in Los Angeles, CA or Potomac, MD.

1. Can XYZ provide customized training solutions?

XYZ also offers customized training solutions if requested. Contact your XYZ account team to learn more about our custom learning options and how you can use training to enhance your organization’s XYZ implementation.

1. Do you provide post-implementation follow up, training or other support beyond the initial install? If so, describe in detail

Yes. XYZ provides several levels of post installation follow-up.

Local account team responsible for on-going customer management

Access to 24x7x365 support desk

Access to the XYZ customer portal which includes detailed technical documentation, knowledge base, release information, etc.

Webinars and web based tutorials

# Maintenance/Support Services

(All responses should be for software and/or hardware proposed in this RFP)

1. Describe in detail your Support Services provided under your maintenance fees? If you offer different levels of support, please detail each level and what is included (provide additional attachment if in chart form).

XYZ provides a wide range of Support options. In summary, they are:

**Standard Warranty:** XYZ products include a Standard Warranty provision that covers both hardware and software defects.

**Premium Maintenance:** Premium maintenance includes 24x7x365 phone, email, and Support portal support. The program also includes other features not found in the Standard Warranty such as Advanced Hardware Replacement.

**Platinum Maintenance:** Platinum maintenance is an option of Premium Maintenance. With Platinum, XYZ assigns from 1-3 named Technical Account Managers (TAMs) to the customer. The TAMs provide a proactive approach to support. Further, Platinum includes features not found in the Premium Maintenance Program such as vouchers for training.

XYZ maintenance programs are detailed in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Standard Warranty** | **Premium Maintenance**[1](https://www.infoblox.com/support/customer/programs#fn:premium) | **Platinum Maintenance**[2](https://www.infoblox.com/support/customer/programs#fn:platinum) |
| **Terms** |
| **Standard** | * 1 year hardware
* 90 days tech support
 | 1-3 years hardware & tech support | 1-3 years hardware & tech support |
| **Online Self Help Resources** | N/A | Yes | Yes |
| **Web/Email Support** | Yes | Yes | Yes |
| **Telephone Support** | Local business hours[3](https://www.infoblox.com/support/customer/programs#fn:hours)  | 24 x 7 x 365 | 24 x 7 x 365 |
| **Response Times** | Within 1 business day | Within 1 hour | Within 1 hour |
| **Hardware** |
| **Replacement** | Exchange Return | Advance Replacement | Advance Replacement |
| **Delivery Method** | Reasonable efforts | Next business day in supported locations[4](https://www.infoblox.com/support/customer/programs#fn:days) | Next business day in supported locations[4](https://www.infoblox.com/support/customer/programs#fn:days) |
| **Account Management** |
| **Dedicated Technical Account Management** | N/A | N/A | Yes |
| **Onsite Visits & Quarterly Business Reviews** | N/A | N/A | Yes |
| **Upgrade Assistance/Standby Support** | N/A | Remote Professional Services engagements available for fee | Yes [5](https://www.infoblox.com/support/customer/programs#fn:plus) |
| **Customer Environment Testing at XYZ** | N/A | Remote Professional Services engagements available for fee | Yes |
| **Technology Upgrades** |
| **XYZ Upgrade Advantage** | N/A | Can add to maintenance program at time of virtual appliance purchase[6](https://www.infoblox.com/support/customer/programs#fn:plus) | Can add to maintenance program at time of virtual appliance purchase[6](https://www.infoblox.com/support/customer/programs#fn:plus) |
| **Training** |
| **Technical Training and Certification** | Available for purchase | Available for purchase | Training credits included |

1. *1 See* [XYZ Premium Maintenance terms and conditions](https://www.infoblox.com/company/legal/terms-premium-maintenance)[↩](https://www.infoblox.com/support/customer/programs#fnref:premium)
2. *2 Requires purchase of Premium service on all units* [↩](https://www.infoblox.com/support/customer/programs#fnref:platinum)
3. *3 In the event of a priority 1 hardware failure, contact support 24x7x365* [↩](https://www.infoblox.com/support/customer/programs#fnref:hours)
4. *4 Order must be placed by 3 p.m. local time* [↩](https://www.infoblox.com/support/customer/programs#fnref:days)
5. *5 Available to customers with Platinum Plus contracts* [↩](https://www.infoblox.com/support/customer/programs#fnref:plus)
6. *6 Until the end of calendar year 2015, existing Trinzic virtual appliance customers with active maintenance contracts can enroll in Upgrade Advantage at any time. However, beginning in 2016, Upgrade Advantage is available only with the purchase of a new virtual appliance.*[↩](https://www.infoblox.com/support/customer/programs#fnref:plus)
7. Describe in detail all that is included under your maintenance program: updates, bug fixes, etc. Are major Software upgrades as well as minor Software upgrades included? If vendor’s proposal includes vendor supplied hardware, are hardware upgrades included?

XYZ maintenance includes all software updates (major and minor), bug fixes, and full version upgrades. Hardware upgrades are not included; however, XYZ typically offers programs for existing customers to upgrade to new hardware at higher discounts.

1. Do you provide a help desk or dedicated support person(s)? What are the hours of operation? Are any of these support services off-shore?

Yes. Highlights by program:

**Premium**

XYZ provides a 24x7x365 support desk. All issues are tracked using an Oracle CRM system with automatic case escalation. Also, customers have direct access to Escalation Managers.

**Global Reach**

Four Major Tech Support Centers

22 Depots Around the Globe (and growing)

Multi-language Support including German, French, Dutch, Korean Chinese and Japanese

**World Class Support Infrastructure**

CRM and Case Management Tools

Rich Customer Portal

* + Knowledgebase, Problem Reporting
	+ Patch and Maintenance Releases
	+ Security Alert

**Round the Clock Access**

Always-on CASE Web Self-Help Portal

Email update of existing Support Issues

24x7x365 Phone Support

Advanced Replacement of Hardware

Platinum: The Platinum program adds from one to three Technical Account Managers (TAMs) that provide response in local time zone(s), backed up 24x7x365 by the Premium Support team.

1. Do you provide Service Level Agreements for Support? If so, provide details.

Yes. For Premium and Platinum Maintenance, XYZ provides a best-effort Service Level Agreement as described in the following table.

| **Severity** | **Definition** | **Initial Response Time\*** | **Commitment (XYZ & Customer)** | **Resolution Targets** |
| --- | --- | --- | --- | --- |
| 1 | Operation/service down or critically impacted. No known workaround. | 1 hour (24 x 7, 365 days a year) | XYZ and customer will commit necessary resources to fix problem or find a workaround. | Emergency bug fix (EBF) if necessary. Fix included in next release. |
| 2 | Operation affected, but not down. Impact may be high. Workaround may be available. | 2 hour | XYZ and customer will commit resources within normal business hours to resolve issue or find a workaround. | Fix included in future release |
| 3 | Moderate to negligible impact. No impact to business. | 8 hour | XYZ and customer will commit resources within normal business hours to restore operations to satisfactory levels. | Schedule for future release if necessary |
| 4 | Request for information, documentation, issues, and enhancement requests | 1 business day | Request dependent | Request dependent |

Response time targets are during business hours only for Severity 2 through Severity 4.
Severity 1 issues are responded to 24 x 7, 365 days a year

For the Platinum Support program, Initial Response Time best effort Service Level Agreement is 1 hour, 24x7, 365 days a year.

1. What is your SLA for response time for support? Describe in detail your levels of severity for software problems, including resolution time for each level. What is your remedy to a licensee for missing any resolution times?

See chart above for targeted SLAs.

# Warranty/Upgrades/New Releases

1. What is your Software warranty period after your solution is put into production?

Software warranty period is 90 days after shipment.

1. What is your hardware warranty for any hardware provided by vendor and proposed in this solution?

Hardware warranty period is 1 year after shipment.

1. Do you offer upgrades and service packs under warranty?

Bug fixes/patches/maintenance releases are provided under software warranty; software upgrades/new versions are provided under maintenance.

1. Please describe your company's policy for system upgrades and service pack releases.

All software upgrades and service packs are included with standard maintenance. This includes new functionality as well as bug fixes and patches.



1. How often are upgrades and/or service packs released?

Software upgrades are released about once every 3 to 4 months.

1. What methodology is used to notify customers of new releases?

XYZ notifies customer via email regarding new software releases. The same information can be found on [www.XYZ.com](http://www.infoblox.com) and the XYZ Customer Support site.

# Other Information

1. Do you keep Software code in escrow? If so, please provide a copy of escrow agreement.

XYZ does not provide Software code in Escrow.