
RFP TEMPLATE

RFP template for choosing maintenance or field service software

Grouped requirements, questions for vendors and scoring criteria



RFP TEMPLATE

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Who it is for

- Maintenance, field service or operations managers about to switch software.
- Procurement and IT teams that need to compare proposals with clear criteria.
- Public bodies preparing a tender who want a technical starting point.

01

How to use this RFP

An RFP goes wrong in two ways: biased toward one vendor, or so generic that the cheapest proposal wins. This template is designed to avoid both.

Three rules

- 1 **Write in terms of capabilities and outcomes**, not by copying a vendor's feature list. "Technicians can see a unit's history on their phone", not "the system shall include module X with a five-level tree".
- 2 **Be honest about must-haves**. Each one reduces competition. If only one vendor meets them all, review the list.
- 3 **Ask for proof, not promises**. Every requirement is shown on screen, in a document or through a reference.

■ Requirement levels

Level	What it means	Effect
M · Must have	You cannot work without it.	If it is not met, the proposal is out.
S · Should have	It adds value, but there are alternatives.	It scores points.
N · Nice to have	It helps, but does not decide.	Only breaks ties.

Before you send the RFP, mark the level of each requirement (M, S or N). The vendor answers in "Meets it" with one of these answers and, in "How it is proven", gives the evidence.

■ Vendor answers

Answer	Meaning
Yes	It does it today, out of the box.
Configurable	It does it today by configuring the system, with no coding.
Custom work	It needs custom development: ask for timing and cost separately.
No	It does not do it.

If you are a public body, adapt this structure to your tender documents and review it with your legal team. The scoring criteria and formulas have to follow the procurement rules that apply to you.

NOTES

02

Your company profile

Without context, every vendor assumes something different and the proposals cannot be compared. Fill in this sheet and attach it to the RFP.

Business and industry	
Sites or locations, and where they are	
Assets or units you maintain	
Do you maintain customers' equipment? For how many customers?	
Field and shop technicians	
Office staff who will use the system	
Requests or work orders per month (approximate)	
Systems you use today (ERP, CRM, spreadsheets, paper)	
Integrations you need	
Languages and countries	
Data to migrate, and how many years of it	
Date you want to be working in the new system	
Budget or planned purchasing method	

Give approximate figures, but give figures. “About 800 units across 12 sites” lets vendors quote comparably; “quite a few units” does not.

NOTES

03

Functional requirements

Delete what does not apply and add your own. Each requirement describes what you need to achieve, not how the software has to be built.

■ A · Assets and inventory

No.	Requirement	Level	Meets it	How it is proven
A1	Organize assets by location (site, building, floor, area) and see the history at any level.	M S N		
A2	Keep each asset's technical data, documents, photos and warranty in its record.	M S N		
A3	Tag each asset with a QR label or similar and open its record from a phone.	M S N		
A4	Link each asset to the customer who owns it and to its contract, if you service third parties.	M S N		
A5	Import the inventory from a spreadsheet, catching duplicates before loading it.	M S N		
A6	Log readings (hours, meters, temperatures) and compare them with their limits.	M S N		

■ B · Requests and work orders

No.	Requirement	Level	Meets it	How it is proven
B1	Receive requests through several channels (email, phone, portal, web form) and log them in one place.	M S N		
B2	Define the statuses of a work order and who can move it from one to the next.	M S N		
B3	Set priorities and response and resolution times, with an alert before they are missed.	M S N		
B4	Log hours, travel, materials and photos on each work order.	M S N		
B5	See the full history of a work order: who did what, and when.	M S N		
B6	Keep customers informed of their request status without them having to call.	M S N		

■ C · Preventive maintenance

No.	Requirement	Level	Meets it	How it is proven
C1	Create plans by calendar, by operating hours or by readings.	M S N		
C2	Create preventive work orders automatically, following the working calendar.	M S N		
C3	Assign the same plan to many assets at once.	M S N		

■ C · Preventive maintenance (continued)

No.	Requirement	Level	Meets it	How it is proven
C4	Define task lists or checklists with a reference value for each step.	M S N		
C5	Log each postponement with its reason and alert the manager if it happens again.	M S N		
C6	Turn an issue found during an inspection into a planned corrective work order.	M S N		
C7	Measure plan compliance by period, by unit and by technician.	M S N		

■ D · Field work and mobile app

No.	Requirement	Level	Meets it	How it is proven
D1	Work in the app with no signal and sync when it comes back, without losing data.	M S N		
D2	See the unit's history on the phone before starting work.	M S N		
D3	Fill in checklists with photos, readings and the customer's signature.	M S N		
D4	Lock the work order once the customer signs it.	M S N		
D5	Plan technicians' schedules and reassign work orders during the day.	M S N		
D6	An app for iOS and Android that is easy for technicians who do not work at a computer.	M S N		

■ E · Field service and customers (if you service third parties)

No.	Requirement	Level	Meets it	How it is proven
E1	Manage contracts with scope, term and service levels.	M S N		
E2	Track prepaid hour blocks that are drawn down with each visit.	M S N		
E3	Give each customer a portal to see their equipment, requests and reports.	M S N		
E4	Prepare quotes from a work order and turn them into work when they are accepted.	M S N		
E5	Know the profitability of each contract and each customer.	M S N		
E6	Send billable items (hours, materials, travel) to the ERP without retyping them.	M S N		

■ F · Spare parts and purchasing

No.	Requirement	Level	Meets it	How it is proven
F1	Track stock by warehouse and by van.	M S N		
F2	Deduct the materials used on each work order.	M S N		

■ F · Spare parts and purchasing (continued)

No.	Requirement	Level	Meets it	How it is proven
F3	Alert when a spare part drops below its minimum.	M S N		
F4	Log purchase orders to suppliers and their receipt.	M S N		

■ G · KPIs and reports

No.	Requirement	Level	Meets it	How it is proven
G1	Calculate MTBF and MTTR by asset and by family, explaining which data is used.	M S N		
G2	Show the maintenance cost of each asset, with hours and materials.	M S N		
G3	Measure compliance with response and resolution times.	M S N		
G4	Export any list to a spreadsheet without asking the vendor.	M S N		
G5	Build your own reports and dashboards with no coding.	M S N		

■ Your own requirements

No.	Requirement	Level	Meets it	How it is proven
H1		M S N		
H2		M S N		
H3		M S N		
H4		M S N		
H5		M S N		

NOTES

04

Technical, security and data requirements

These are the requirements that are hardest to change after you sign. Ask for every answer in writing and, where possible, with the document that backs it up.

■ T · Technical and security

No.	Requirement	Level	Meets it	How it is proven
T1	State the service model (cloud or on-premises) and what it includes: hosting, backups and updates.	M S N		
T2	State where the data and its backups are hosted (country or region).	M S N		
T3	Run automatic backups, with stated frequency and retention, and tested restores.	M S N		
T4	Manage profiles and permissions by role: each person sees and does only their own work.	M S N		
T5	Require two-factor authentication for the profiles you choose.	M S N		
T6	Log who viewed or changed each piece of data, and when.	M S N		
T7	Encrypt data in transit and at rest.	M S N		
T8	Offer a documented API that can be reviewed before buying, and webhooks to notify other systems.	M S N		
T9	Integrate with your ERP: which data flows, in which direction, and whether the integration exists or is a project.	M S N		
T10	Integrate with the company's email and calendar.	M S N		
T11	Export all data and documents, in a standard format and at no cost.	M S N		
T12	Commit to a service availability, with its measurement method and what happens if it is missed.	M S N		
T13	Show the security certifications your organization requires, with the current certificate and its scope.	M S N		

NOTES

05

Implementation, migration, training and support

The best software, badly implemented, gets abandoned. Ask for the project plan in as much detail as the features.

■ S - Services

No.	Requirement	Level	Meets it	How it is proven
S1	A phased implementation plan, with dates, deliverables and who does what.	M S N		
S2	Migration: which data is migrated, who prepares it, how it is validated and what happens to errors.	M S N		
S3	A pilot with a small team before rolling it out to everyone.	M S N		
S4	Training by profile (technicians, office staff, managers and admins), with format and duration.	M S N		
S5	Support: channels, hours and language.	M S N		
S6	Support response and resolution times, with their measurement method.	M S N		
S7	Updates included, and how and when changes are announced.	M S N		
S8	A named contact during implementation and afterward.	M S N		

NOTES

Contract terms

They protect you the most and are the ones most often forgotten. Ask for the proposal to accept them, or to say in writing where it does not.

Term	What to ask for	Accepted
Data ownership and portability	The data is yours. Full export, in a standard format, at no cost and within a committed time.	☐
Exit	When the contract ends: time to export, help during the transition and certified deletion.	☐
Data protection	A data processing agreement, the list of sub-processors, where the data is stored and security breach notification.	☐
Service levels	Availability and support times, with their measurement method and the consequences if they are missed.	☐
Total price	Licenses, implementation, training, support and expected expansions over the whole contract.	☐
Expansions	Price of extra users, modules or storage, fixed for the whole contract.	☐
Price reviews	When the price can change, and by how much at most.	☐
Term and exit	Minimum term, notice period and how the contract ends.	☐

The term that protects you most is portability. If you cannot take all your data with you, in a format another system can read, switching vendors will be expensive when you need to.

NOTES

07

Questions for vendors

Mark the ten that matter most to you beforehand and ask for them to be answered on screen, ideally with your own data. The rest, in writing and in the same format for everyone.

No.	Question	Vendor A	Vendor B	Vendor C
THE DEMO AND THE PRODUCT				
1	Can you show it to me on screen now, with one of my cases?			
2	Is what you are showing me in use at a company today, or is it planned?			
3	Which part of what I am asking for needs custom development?			
4	What happens in the app if the technician loses signal halfway through the job?			
5	How does a technician see a unit's history on the phone?			
DATA				
6	Who prepares and loads the migration, and how is the data validated?			
7	Where is my data hosted, and who else processes it?			
8	If I leave, how do I export everything, in what format, how fast and at what cost?			
INTEGRATION				
9	Does the integration with my ERP exist or is it a project? Which data flows, and in which direction?			
10	Can I see the API documentation before signing?			
11	What happens if the other system is down?			
THE PROJECT				
12	How long does implementation take for a case like mine, and what do you need from my team?			
13	What training is included, for whom and in what format?			
14	Can we start with a small team?			
SERVICE AND MONEY				
15	How is availability measured, and what happens if it is missed?			
16	What does the price include, and what is extra?			
17	Do all users cost the same, whatever each one uses?			
18	How much does it cost to add users or modules during the contract?			
19	Is there a minimum term? How is the price reviewed?			

No.	Question	Vendor A	Vendor B	Vendor C
20	Can I talk to companies like mine that use it, chosen by me?			

Answers that should worry you

- **“That can be configured”**, without showing it. Ask to see it on screen.
- **“It is on the roadmap.”** It does not exist today: decide based on what exists.
- **A price that does not say what it includes.** Ask for every line item in writing.
- **References chosen only by the vendor.** Ask to talk to companies you choose.

NOTES

08

Scoring criteria

Publish the criteria and their weights before you receive proposals. That way every vendor knows what counts and you can justify the decision.

■ Criteria and weights

Criterion	Starting weight	Your weight
Functional fit	35%	
Total price over the whole contract	30%	
Implementation and migration plan	15%	
Support and service levels	10%	
Experience with similar projects	10%	
Total	100%	100%

These are starting weights, not a rule. What matters is that they add up to 100 and that the price is the total over the whole contract: that way, a vendor cannot win by cutting the license and charging separately for implementation.

■ Rating for each requirement

Rating	Meaning
0	Does not meet it.
1	Meets it with custom development, or only in part.
2	Meets it today, out of the box or by configuring.
3	Meets it and has shown it with your data.

Functional = $\sum (\text{rating} \times \text{requirement weight}) \div \sum (3 \times \text{requirement weight}) \times \text{criterion points}$
 Price = $\text{criterion points} \times \text{lowest total price} \div \text{proposal's total price}$

Weight of each requirement: for example, 2 for should-haves and 1 for nice-to-haves. Must-haves do not score: they are met or the proposal is out. In public procurement, use the formulas set by your tender documents.

■ Comparison matrix

Criterion	Weight	Vendor A	Vendor B	Vendor C
Meets every must-have?	—			
Functional fit				
Total price over the whole contract				
Implementation and migration plan				
Support and service levels				
Experience with similar projects				

