



Creating your Infrastructure Upgrade and Managed Services Proposal

Blueprint For Success

Introduction

In this document, you will find information to help you understand the importance of creating and utilizing infrastructure upgrades and Managed Services proposals to help clearly define your scope of work, set appropriate expectations and shorten sales cycles.

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What are infrastructure upgrade and Managed Services proposals?

The objective of an infrastructure upgrade and Managed Services proposal is to utilize data gathered during previous customer discovery meetings and onsite network and environment analyses in order to create a document that reflects a proposed scope of work, high-level implementation plan and estimated timelines and costs to:

- Deliver solutions to improve the customer's efficiencies and productivity while reducing costs and mitigating business pain and risk
- Prepare the customer's environment for the delivery of Managed Services

This document will reinforce the customer's perception of you as a qualified, Trusted Advisor and help shorten sales cycles.

The infrastructure upgrade and Managed Services proposal is utilized in the following scenarios:

- When closing a sales opportunity that includes modification, remediation or upgrades to equipment, software, workflows, processes or documentation in an existing environment, or any other activity required prior to the delivery of maintenance services under a Managed Services Agreement

Existing documents utilized to compile the data required to prepare the infrastructure upgrade and Managed Services proposal include:

- Needs Analysis
- Customer Information Worksheet
- Network Analysis
- Any other documentation or data gathered through physical means or the use of software tools

This information is used to develop the requirements contained in the infrastructure upgrade and Managed Services proposal.

Benefits of infrastructure upgrade and Managed Services proposals

The act of developing an infrastructure upgrade and Managed Services proposal is often the first step taken by solution providers in preparation for closing a sale with a new prospect. Reasons for this include:

- Validation as a Trusted Advisor that is technically capable of addressing the customer's needs and value as a business partner
- The ability to clearly document the customer's needs and pain points
- The ability to accurately represent the customer's existing environment including:
 - All hardware including servers, desktops, laptops, smartphones/pda's, routers, switches, firewalls and any other network-connected devices or appliances



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- All software and line of business applications
- All services
- All network connections including VPNs
- Affected workflows and processes
- The ability to identify up-sell and cross-sell opportunities
- The ability to develop a remediation plan and introduce solutions to address the customer's needs and pain points
- The ability to create a high-level project plan to address the required work scope

The Benefits



An infrastructure upgrade and Managed Services proposal is valuable to the customer as well, as it will:

- Provide the customer the comfort level required to engage with the solution provider through validation of their technical proficiency and capability to address their business needs
- Documents in a clear and easy to understand manner the customer's existing pain points and challenges and illustrates the solution provider's strategy to address them, along with the expected results.



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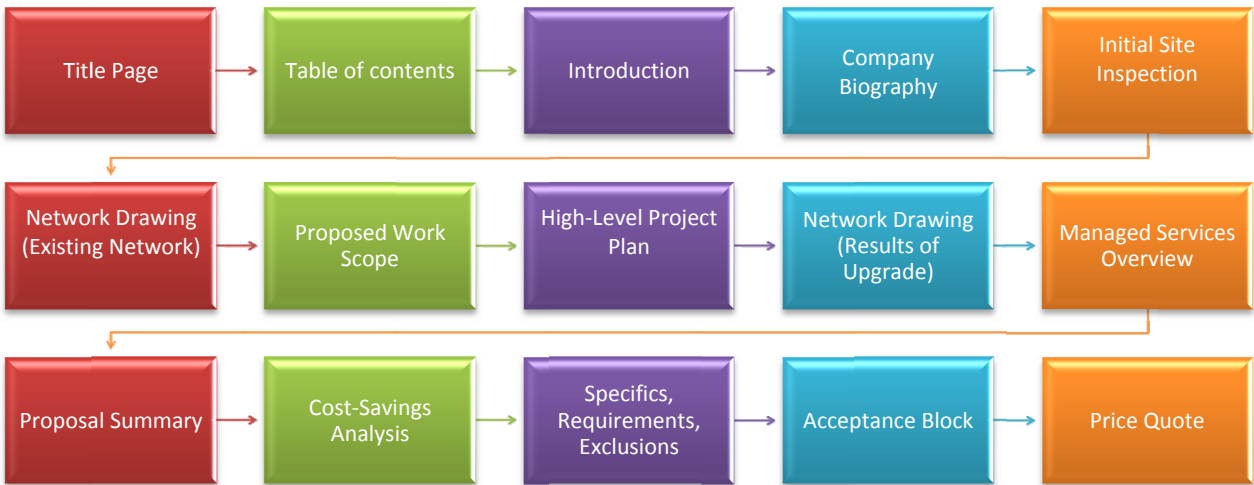
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The Deliverable

The infrastructure upgrade and Managed Services proposal is broken down into several specific sections, which include:

- Title page
- Table of contents
- Introduction
- Company biography
- Initial site inspection
- Network drawing illustrating current environment
- Environmental concerns
- Proposed work scope
- High-level project plan and phases
- Network drawing illustrating environment after infrastructure upgrade
- Overview of Managed Services offering
- Summary of proposal
- Cost-savings analysis
- Specifics, requirements, exclusions
- Acceptance signature block
- Price quote

The Deliverable



MSPU
Managed Services Provider Unit

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Title page

The title page of the infrastructure upgrade and Managed Services proposal should include company name and logo, along with your customers, as well as any logos depicting your partnerships, affiliations and industry certifications or competencies.

Table of contents

The table of contents will help you and your customer quickly identify and access specific sections of the proposal.

Introduction

This section of the proposal introduces your organization history and unique qualifications.

Company biography

The company biography section of the proposal contains your certifications, partnerships and affiliations listed by section.

Initial site inspection

The initial site inspection section of the proposal will contain a general summary of the current state of the customer's environment and an overview of the network, and should not be too technical in nature, but simply technical enough to pass scrutiny should the proposal be "shopped" internally or externally.

Network drawing (existing network)

This section of the proposal will contain a network drawing depicting the current state of the customer's network environment, and will be used as a comparison against the network drawing illustrating the results of the upgrade later in the proposal.

Environmental concerns

The environmental concerns section of the proposal will document and detail areas of concern which the proposal will address in a later section, and will cover hardware, software licensing, connectivity, security, efficiency and productivity.

Proposed work scope

This section of the proposal will document a general high-level overview of the proposed work scope designed to address the environmental concerns of the previous section.

High-level project plan

The implementation section of the proposal will illustrate a high-level project plan broken down into phases with an estimated timeframe for completion of each phase.



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Network drawing (results)

This section of the proposal will contain a network drawing depicting the results of the infrastructure upgrade, and will be used as a comparison against the earlier network drawing illustrating the current state of the network.

Managed Services overview

The Managed Services overview section of the proposal will document the features and benefits of your Managed Services offering.

Summary

This section of the proposal will provide a concise summary of the overall proposal and illustrate your unique qualifications to implement these services.

Cost-savings analysis

A cost-savings analysis reflecting the customer's ROI from Managed Services is included in this section of the proposal.

Specifics, requirements and exclusions

This section of the proposal will document your specifics, requirements and exclusions for delivering these services.

Acceptance block

This section of the proposal contains a signature block for both you and your customer to sign, signifying acceptance of the proposal and agreement to begin work.

Price quote

The price quote is included as a separate document to the proposal, and documents payment terms and financing options.

Conclusion

A properly prepared infrastructure upgrade and Managed Services proposal will:

- Project the appropriate image for new prospective customers
- Validate a customer's need for your services
- Confirm the benefit you bring to your customers
- Shorten your Managed Services sales cycle
- Create an opportunity for selling new solutions

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