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| RFP Template |
| Digital Asset Management |

Date: September 2021

Version: 1A

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# Presentation of our company

[This section is devoted to the presentation of your company. Besides the usual information (group, key figures, history…) you must emphasize those determining factors which will help the vendor to better meet your needs, such as the features of your service [COM]/[MKT], the languages spoken in the company, the current context of its operations… In addition, indicate whether this DAM project is integrated into a general plan within your company.]

## History

## Our job

## Our mission and responsibility

## Our values

## Our vision

## Our strategy

## Key figures

# General outline of the project

## Current situation – why this RFP

[Describe the reasons for launching this RFP here. For instance, the difficulties you encounter and the limitations you have with your solution today. You can find herebelow the most common “pains” expressed in the RFPs we receive. Some may correspond to your situation. Ideally, not too many, so you should prioritize your pain points from the most important to the least, keeping only the meaningful ones. This will help vendors create the most relevant answer to your needs.]

We have noticed that our current multimedia library does not answer to every need, especially regarding the Communication and Marketing Group department, and that there are several areas of improvement.

The most salient limitations of the current platform are as follows:

* It is difficult for end users to find relevant assets // Research is slow and not well designed for end users.
* Multilingual management is limited and complex; in particular, a lack of thesaurus and of multilingual authority files necessitates indexing in both languages,
* We have many duplicates and obsolete assets.
* We create new content, but some of it already exists.... // Employees are always creating new content, graphics, layouts, slides, presentations and content - and always from scratch, even if some of it already exists.
* Our logo is used incorrectly, or our brand is presented inconsistently // Some of our marketing materials are not CI compliant.
* The required storage space - especially for high-resolution (HD) videos - is missing or not performant enough.
* We need several different versions of an image, but don't have time to create them manually // We need to manually adjust the image formats to each channel.
* Our marketing messages are not presented consistently across departments, divisions, industries and target markets.
* We need a special tool for video editing (subtitles, distribution).
* We waste too much time and money with content creation agencies (no reuse of existing content, no easy customization of templates or content by staff).
* Our content production or distribution processes - or much of it - are not efficient enough.
* Collaboration, review and approval cycle is slow (inefficient, manual...), approval processes are demanding.
* The content is not in a format that anyone can view, especially partners or legal experts inside or outside the company.
* Tracking revisions of work in progress or completed work is difficult // Are we always using the latest released version?
* Etc.

And as soon as **we want to deliver all our asets on our existing digital and/or physical channels** :

* Our content is distributed in multiple systems / servers / or even individual workstations, and we have no control over their use. // Assets are duplicated in various media channels, DAMs, brand portals.
* There are ambiguities in the (manual) tracking of licensed photos, images.... // We have already been fined for violating the rights to use a licensed photo because the rights were unknown.
* It's hard to share media across projects, groups, divisions, partners, or channels // Our team can't respond quickly or at all to partners, distributors, customer requests that need our content // My FedEx or UPS account has recurring invoices for shipping DVDs or drives "urgently".
* Too many media silos or non-networked systems don't work together: PIM/CRM/CMS // Multiple existing systems duplicate or complicate enterprise-level management efforts.
* We want our social, web, mobile and email marketing channels to be able to work with the same content within a combined campaign.
* There is no integration with end user applications e.g. MS Office (Powerpoint especially) or Adobe tools (InDesign, Photoshop).
* We can't track asset usage - where they are used, who uses them, and how often they are used.

## Expectations and objectives

[From the pains described above, you should derive some Expectations and Objectives. Some examples are below. Again, select those that resonate with your needs, and do not hesitate to prioritize them.]

We have therefore decided to launch a call for tenders for the purpose of renewing the multimedia library and fully answering our needs by addressing the following challenges:

* Making indexing more fluid.
* Increasing the speed and ease of research.
* Ensuring end users’ satisfaction and autonomy.
* Handling “multi-challenges” better: multi-languages, multi-brands, multi-countries all require powerful search abilities and strong segmentation capabilities.
* Tracking assets and analytics.
* Using state-of-the-art video features (player, subtitles, adaptive streaming…).
* Handling as many file formats as possible (images, videos, 3D, 360° videos…) and ensure the platform evolves (regular versions) with future file formats.
* Workflow solutions to manage brand and legal compliance.
* Automatically create file variants to accommodate media fragmentation.
* Distributing assets to websites, measuring their success. [This is the Single-Source-of-Truth expectation: the DAM tends to be more and more at the center of asset distribution. This avoids duplicates, enables brand consistency and rights management, and tracking is probably key when you want to activate that expectation: how many times this asset is seen, on which site, from which country, …]
* Integrating with end user programs e.g., Powerpoint, InDesign, Photoshop, etc.
* Integrating with 3rd party softwares, our own Martech ecosystem (PIM, CMS, ERP…) through state-of-the-art maintained and documented APIs. [This expectation deserves to be more detailed. When possible, state which system, maybe the Vendor name, and ideally describe some use cases: retrieve Product information from the PIM with a unique SKU code, send a link to the PIM so assets can be delivered automatically to every source directly from the DAM...]
* Ability to publish and improve the end user experience through personalizing assets throughout our digital media ecosystem.
* Ability to localize sales and marketing materials, including files dedicated for Print (InDesign), videos (automated or semi-automated subtitles), ...
* Etc.

Vendors should be able to explain how they can help us achieve these high-level expectations through the use of their solution.

## ROI expectations

[Not always an easy exercise, but for sure a useful one, should you convince your team that such a project is useful / deserves a budget. Here’s an example, but lines and figures will be yours:]

Here’s a simplified simulation of the time we wish to save with our new DAM platform. This directly translates into Return-on-Investment. Do not hesitate to refine this model for us, using your own experience of similar customers.

|  |  |  |  |
| --- | --- | --- | --- |
| Time spent per user per week | With our current DAM platform [or without a DAM, if none] | Expectation with the new DAM platform | Time saved per user per week |
| File conversion, resizing, cropping, and reformatting | 30 min. | 10 min. | 20 min. |
| Find the Right Files | 60 min. | 15 min. | 45 min. |
| File Reuse and Content Re-creation | 50 min. | 15 min. | 35 min. |
| Digital Rights and Copyright Management | 30 min. | 10 min. | 20 min. |
| Metadata translations for other countries | 60 min. | 10 min. | 50 min. |
| Sending and exchanging files with other departments | 10 min. | 3 min. | 7 min. |
| Processing External and Light User Requests | 30 min. | 5 min. | 25 min. |
| Localize our InDesign files | 60 min. | 10 min. | 50 min. |
| Publish our assets on our multiple websites | 45 min. | 10 min. | 35 min. |
| **TOTAL** | **XX min.** | **YY min.** | **ZZ min.** |

[Apply these results to your different user categories, average salary per hour, and you will get a good idea of what your ROI expectation can be.

You can add to this some other savings/earnings directly in money value, if applicable. Some examples below:]

* Estimation of money spent per year in reshooting assets that already existed somewhere: XX$$
* Estimation of money spent per year in penalties for not respecting photographers’ rights (because you are unable to control them today): XX$$
* Estimated possible earnings per year due to an improved time-to-market: XX$$
* Estimated possible earnings per year by a precise identification of the assets that help selling on your web sites (and by stopping producing those that don’t): XX$$
* Etc.

## Useful figures

### Number and types of users

[Introduce who in your enterprise, uses or will use the multimedia library. Example below.]

Today our platform is used by XX users divided in the following main categories:

* XX administrators: they have all rights, including creating users.
* XX advanced users: they contribute assets into the platform [Sometimes vendors will ask for more details: are they allowed to only upload assets, or also to validate/publish assets, to manage keywords etc.? Are they internal/external?]
* XX end-users: they search/share/download assets. [Usually the largest user group, and most of the times unlimited and free of charge.]
* [There can be some other roles in your organization: validators, webmasters publishing assets to your websites, legal users for compliance, etc.]

Here are the figures we expect to reach once the new platform is deployed:

* YY administrators.
* YY advanced users.
* YY end-users.

[Do not hesitate to share more details about the organization: this will help in making the best estimation in license use, but also to understand how standard (almost no project) or specific (a consulting type of project) your need is. Example:]

Group XXX is present in XX countries and employs XXX collaborators (employees and agents) throughout the world, all being potential users.

Other external persons (agencies, press, etc.) can also connect in order to take advantage of the software tool features.

A user from Brand BB / Country CC should only be able to see assets from his/her Brand and Country [or not, this can also be decided during a setup project, but this gives a hint on whether this type of organization should be considered.]

### Number and types of assets

[Most RFPs we receive lack some or all of this information. In this case, vendors will make assumptions. Of course, the more details you share, the more the answers will be relevant.]

The solution must support and manage the following media: photos, videos, audios, documents…

The estimated total volume of assets to be stored in the DAM is approximately X TB

The approximate breakdown of these assets is as follows:

|  |  |  |
| --- | --- | --- |
| **Asset type** | **Main figures** | **Other comments** |
| Photos | Number of photos: XXX  Total weight: XXX GB  Main formats used: …  [Indicate the expected growth per year] | [Add useful details if any. Example:]  The iconographic stock consists both of images coming from art purchases and of independent photographers’ productions.  They are xx% corporate pictures, yy% product packshots, etc.  Today they are centralized [where?] / in several repositories. |
| Videos | Number of videos: XXX  Total weight: XXX GB  Main formats used: …  [Indicate the expected growth per year] | [Add useful details if any] |
| Audio | Number of audio files: XXX  Total weight: XXX GB  Main formats used: …  [Indicate the expected growth per year] | [Add useful details if any] |
| Others | [Describe the stock of documents, 3D files, print productions, …]  [Indicate the expected growth per year] |  |

# RFP process

[Describe in this part the expected process for this RFP, example:]

* NDA signature by Vendors: xx/xx/xxxx
* RFP sent to Vendors: xx/xx/xxxx
* Q/A session: [Often formal and in writing, with a maximum date. Be aware that, when possible, having a direct, more informal access for questions can be relevant and help you get the best from your potential vendors.]
* Proposals due: xx/xx/xxxx. We expect at least the following parts in the proposal:
* Your company main information
* Similar existing clients either in the same vertical, or with similar expectations
* Product information and why it fits our needs
* Which need it does not fit, and what do you suggest
* Project focus: organization, methodology, assumptions and estimation
* Hosting information, SLA, security
* Financial part
* A shortlist of the best vendors shall be communicated on: xx/xx/xxxx
* They will be invited to a pitch session of 2 hours between week xx or week yy, including a demonstration of the platform (some scenarios could be sent after receiving the proposals).
* 1 or 2 more workshops can be organized afterwards until a final choice is made for negotiations.
* Contract phase typically lasts 1 month.
* Expected starting date for the project: xx/xx/xxxx
* Ideal go-live date: xx/xx/xxxx [insert here any hard deadline you may have, and explain why. Be aware that the expected duration of your project gives an idea of how big you think this project should be. 1-2 months indicate a straightforward project, 6 months or more of course show the vendors that you probably anticipate a steady project process.]

[Insert here the contacts for the RFP, where to send questions, etc.]

# Description of expected solution

## General principles

The DAM platform must present different features for the different user roles.

Here’s a non-exhaustive list of features, some of them will be detailed in the following chapters:

* Typical features for administrators:
* Management of users and of their roles, grants, etc.
* Access to all.
* Typical features for advanced users:
* Management of keywords, thesaurus, …
* Upload, indexing and asset publication.
* Editorial animation of the platform (news, latest updates, FAQ, etc.).
* [If applicable] The ability to send a brief to an agency, iterate on the assets that are produced (collaborative workflow, comments on the asset, versioning, comparison), until they are validated and published into the DAM.
* Typical features for end-users:
* A user-friendly access, 100% web-based, adapted to our colors and logo, in responsive design (for mobile/tablet access).
* Efficient search bar, auto-complete, filters adapted to our metadata.
* The ability to separate assets into different collections.
* The ability to add any type of assets into carts/baskets/boards that can be saved, private, public, shared…
* The ability to download any possible pre-generated variation of the asset, or a variation that can be generated on-the-fly.
* Integration to end-user applications e.g., InDesign, Photoshop, PowerPoint, etc.
* Typical features for webmasters, or any other user group who needs to access the assets from different softwares/sites in the company [if applicable]:
* A distribution capability of assets on any channel: CMS and/or social media or other digital media channels. In order to avoid duplication and enable personalization.
* The ability to embed directly in the CMS a “window on the DAM”, where searching/filtering assets is as easy as on the DAM platform, and where the webmaster can paste a link to the asset in the CMS, instead of duplicating it.

## Assets lifecycle

[It can be useful to share your idea of the assets’ lifecycle, since this gives vendors a better view on your functional expectations. It is most often set up as a workflow: a replicable process managing the life cycle of all your assets. There is no universal workflow; the best one is adapted to your organization and meets your own objectives. However, your DAM vendor should be able to provide a simple and straightforward workflow, that would probably fit your immediate needs. Use this chapter to describe your organization’s main workflows of contribution, indexing and translation.]

Here’s a presentation of what we believe our assets’ lifecycle should be. We expect vendors to challenge this if required, since there are probably some optimization ideas to draw from your other DAM projects.

The life cycle of an asset goes through at least four phases:

* Asset ingestion/upload:

[Here are some examples of specific behaviours that can be found in some organizations:]

* An ingestion workflow that deals with duplicate (or suspected duplicate) assets: this can prevent the user to upload an asset that already exists, a manual check should be possible.
* Specific rules on the asset before ingestion (minimal size etc.).
* Some automated metadata fields, out of IPTC/EXIF technical metadata (author, date, …).
* Some AI-generated keywords, if desired.
* Etc.
* Asset indexing:

[Explain here how you wish to proceed: internal process or do you wish to delegate, for high quality maintenance, the indexing of the DAM. Examples to choose from:]

* We plan to have contributors index the assets themselves, by having some mandatory fields, and pre-existing authority lists of keywords and/or thesaurus.
* Or: despite the possibility for our contributors to index themselves, we plan to go through a second step of validation with our internal team of advanced users. They will be in charge of checking/completing the initial indexing.
* Or: we are looking for an external team of DAM specialists (librarians) who can check/complete indexing on a day-to-day basis, or at least through regular audits and optimizations of the asset base. We believe it’s the right way to ensure search is always as efficient as it was on day 1.
* [You can also describe your segmentation needs: for instance, only a user from country A / brand B can upload an asset for this country and that brand. And only users from this country / brand can access them.]
* Asset rendition:

[Explain here your requirements for asset rendition. Examples below:]

* Assets should be automatically rendered into different variations (sizes/formats for images, format/encoding for videos, thumbnails/previews for other documents).
* Videos can be automatically subtitled through an AI functionality, then can also be manually verified/modified.
* Videos can be easily edited in order to add chapters.
* A watermark of our choice can be added to images, depending on their privacy level for instance.
* Asset publication:

This action makes the indexed and validated asset immediately visible to end-users.

[You may need to add some conditions to this. For instance:]

An asset can be “embargoed” until a specific date and time. Only then will it become visible to end-users.

* Asset archiving:

[Most often, the need is not to physically archive the asset in a different place, but to un-publish it. Example:]

Once the asset reaches its end-of-rights date, or by a manual action, it will be set to an “archived” status, and not visible anymore to end-users. It will also not be distributed anymore to external websites.

## Functional description

[These are typical examples of often requested features in the RFPs we receive. Feel free to suppress or add your own needs.]

### For administrators

* User management needs to be straightforward for administrators.
* They can create, delete or suspend user accounts.
* They attribute the roles, brand, country, language etc.
* It must be possible to login automatically through our SSO (Single Sign-On) process. [If there is an SSO, state here which IdP you use today.]
* There is a user registration workflow: a form where would-be users require an access, and an admin who accepts or rejects the request. Access can be open for a specific duration.

### For advanced users

Uploading assets

* Batch upload of assets.
* Ability to tag or delegate tagging to another user.
* Duplicate detection: with a visual human control.
* Efficient tagging of multiple assets / mass tagging options.
* Automated translations support.

Indexing and metadata

* Multi-lingual author lists and thesauri (unlimited number of levels).
* Possibility to define synonyms.
* Many types of metadata fields, mandatory or optional: date, dependent fields, collections, attached file, free text, etc.
* Values of lists, keywords, thesauri, can be performed by advanced users or administrators.
* Batch indexing.
* Auto completion.
* Articial Intelligence: we are interested in vendors letting us know how we can possibly use AI in your platform for these purposes: autotagging, automatic subtitles on videos, improve content moderation, …
* [Please note that for some specific needs in your business, you may be interested in a deeper look into AI. For instance for automatic tagging, generic AI is good, but offers only generic terms (are there people in this asset, is this a car, a bike, a baby, is it outside, etc.). For your own specific needs (your products), you may want to ask the provider what they can offer in terms of deep learning process. It can be interesting to try and conduct an experience with the vendor, during the project and measure the efficiency of this process.]

Usage rights

* Configurable metadata fields related to assets rights management (photographer, copyright, …).
* Possibility to setup alerts and/or automated workflows (archiving when the end-of-rights date is reached for example).

Creative brief, collaborative workflow

* [Some organizations need a specific ingestion process, in addition to the standard one. Examples:]
* Possibility to set up a brief form (expected asset type, description, event, …), to be sent to our agencies, so we can ask to create a new specific asset.
* The agency can then upload one or several creative proposals directly into the platform, in a specific collaborative workflow, where we can comment, mark-up both images and videos (with a timecode) and come back and forth between the agency and our team.
* This collaborative workflow implies choosing a dedicated team from the start, and automated notifications each time a request is sent, or an asset is received. [Please note this workflow is sometimes straightforward, sometimes more specific, for instance if several people need to validate the asset, if there is a 2-step validation process (business and legal)… Do not hesitate to describe your own organization here.]
* Ideally we can compare, side by side, assets of a previous version with the newly sent assets.
* Once this iterative process is over, the final validated asset(s) is (are) ingested into the DAM.

Analytics

* Detailed analytics on the DAM usage per country, per brand, how many uploads, downloads.
* Top downloaded assets, most performed searches, searches with 0 result, …
* Number of users, …
* Ability to export analytics to external tools.
* [If the assets are distributed on web sites, social networks, etc., it is a high value feature to be able to track/monitor the success of your assets.] Ability to collect and centralize in the DAM, the number of views of an asset on all the external sites where it is distributed.
* Etc.

### For end-users

Search

* Google-like search should be the standard search mode.
* Filters, advanced search.
* Possibility to set up a folder-like structure. But a single asset can be found in several folders at once, without being duplicated (logical structure vs. physical structure).
* Ability to save specific searches.
* URLs should be explicit. We want to copy-paste the URL, share it with someone else (in any chat system), and, if they are allowed, they would access the same search result.
* Thumbnails will be automatically generated, video overviews will play on a simple mouse over, even complex files should be thumbnailed (InDesign files, Word, Powerpoint, …).
* On the initial search page (“homepage”), it must be possible to present some platform information to the end-users: latest updates, how-to, etc.

Download

* Download should be straightforward and offer pre-defined renditions of the assets.
* Some users may not have rights to access all renditions. In some cases, we may need a watermarked rendition.
* Large downloads can be sent directly to a FTP repository.
* Editing an asset: cropping for instance should be possible before download.

Share

* Easy-to-use basket or cart or board, where the user can add an asset selection (all types of assets can be mixed).
* Possibility to share these: by email, to another platform user.
* Possibility to download a board (as a zip file for instance).

Templates localization

* [Some organizations want to propose their end-users some print or digital templates that they can localize. Examples:]
* Possibility to modify a pre-generated InDesign print template for localization purposes: easily modify the text and images while respecting our CI. Our end-users do not have InDesign installed on their workstations.
* Automate some of this localization. [Be more specific here. Example: selecting a Product from a list would automatically “flow” the Product image, the Product price, the Product description in the right boxes in the InDesign page.]
* Automatically generate different sizes of this Print document for ad purposes.
* At any point, we want the possibility for an advanced user to retrieve the InDesign file, modify it, and re-upload it into the platform.
* Possibility to create digital templates (HTML) that can be localized by end-users: easily modify the text and images while respecting our CI.

External tools

* Ability to access DAM assets from MS Office (Powerpoint).
* Ability to access DAM assets from Adobe tools (Photoshop, InDesign, Illustrator).

### Product-oriented features

[Some organizations require to handle Product packshots, this can lead to Product-related needs. Some examples below:]

* Our PIM platform (Product Information Management) is XXX. It is the reference to all our Products, but lacks some marketing information about the Products and doesn’t store the Product assets. We need to be able to upload Product assets, with a specific SKU, and the DAM would automatically find the right Product information in our PIM.
* We also would like Product assets and their metadata to be automatically sent to the PIM, ideally their link, in order to avoid duplicates.
* In the DAM, it must be possible to search by SKU and to display a Product page: possible to browse assets not only by media but by Products, with the ability to browse the company catalog and see all assets related to a single Product in a single page.

### For webmasters

[Some organizations want to use their assets on external websites for communication needs or eCommerce. Some examples below:]

* Ability to distribute assets (images, videos, documents) directly from the DAM to an external web page (embed code). We want to avoid duplicates, make sure asset rights are valid, and track the asset usage.
* The embed code should include possible options: rendition, resolution, …
* Performance is key: vendors shall explain how they achieve high performance/high availability for this use case.
* Security is key: vendors shall explain how they secure access to images while publishing others on external websites.
* [Typical communication use case:] Webmasters should be able to access the DAM directly from their usual CMS interface.
* [Typical eCommerce use case:] We have big volumes of Product assets to distribute to multiple website around the world. We need to automate the calling URLs with a SKU reference, a variation. Vendors shall present similar use cases and how they have handled this with their clients.
* [Again, it is a high value feature to be able to track/monitor the success of your assets.] Ability to collect and centralize in the DAM, the number of views of an asset on all the external sites where it is distributed. And to filter per website/country.
* Focus on videos: embedded video player to distribute our videos on websites, ability to add subtitles (ideally pre-generated by AI), to create chapters, banners, pre-rolls/post-rolls, … Videos should be playable in adaptive streaming.

### Integrations to 3rd party systems

[Ideally, describe your current IT ecosystem in relation to the future DAM platform. Some examples of typical integrations below:]

* Please describe the API you offer. We would require a platform with a state-of-the-art and documented API so we can easily access assets from any 3rd party system.
* Single Sign-On: how do you usually integrate with SSO platforms?
* Integration to our 3rd party softwares: [These expectations deserve to be more detailed. When possible, state which system, maybe the Vendor name, and ideally describe some use cases.]
* PIM: [Use cases examples: retrieve Product information from the PIM with a unique SKU code, send a link to the PIM so assets can be delivered automatically to every source directly from the DAM, …]
* CMS: [Use cases examples: enable the webmaster to retrieve the right asset directly from the CMS interface, avoid any duplication, track the asset usage from the DAM. Or automatically push the right Product asset to the right place without a webmaster being involved…]
* Production workflow platform: [Use case examples: some of our assets come out of a specialized production workflow, following complex validation steps in different services. Once validated, we want the asset to be ingested into the DAM.]
* Sales portal: [Use case example: our Salespeople need to access the assets from our dedicated mobile app.]
* Etc.

### Miscellaneous

* [In some organizations, segmentation is a challenge in itself. It consists in defining who is allowed to search/find/share which asset. If that is your case, describe it as much as possible so the Vendor can make the most relevant estimation since it may impact the setup complexity. Example:] Our users are attached to 1 or several brands, usually 1 country, they should be allowed to see only assets of their brand(s) and country. However, in some cases, a user from Brand A can share an asset A to a user from Brand B. Uploaders should also be able to upload only where they’re allowed to. We also have delegated administration: global admins have every right, but admin from Country XX can only create users in Country XX. We are interested in similar use cases you may have with your clients: multi-brands, multi-countries… and multilingual challenges.
* UI languages: the UI must exist in at least the following languagues: XXX, XXX. Nice-to-have languages are: XXX, XXX. Please state if it is possible to add a new UI language if required in the future.
* Data privacy: the platform must be compliant with GDPR (EU), CCPA (California), PIPEDA (Canada), LGPD (Brazil), etc. [Choose your own, depending on the territories you cover.]
* All actions must be logged / historized.

## Hosting, SLA

We are looking for a SaaS solution: the platform must be hosted/monitored/backuped by the Vendor.

The hosting we expect must be:

* Simple: entirely taken care of by our partner.
* Highly-Performant: on a worldwide reference platform for hosting applications and websites.
* Scalable: the platform’s processing power can be increased at any time in order to take in more users and process more pages, more volume, more traffic…
* Capable of unlimited extension: bandwidth and storage will be unlimited.
* Secured: access through https, dedicated environment.
* Available 24/7.

Please describe:

* Your internal organization.
* Your datacenters (and their location).
* Your processes.
* Your certifications if any. We expect at least your datacenters to be certified (if outsourced), and the vendor to hold some security/data privacy certification(s).
* Your typical architecture.
* Your failover strategy (in case of a physical server failure, what is the process, how much time to restart from where we were).
* Your backup strategy.
* RTO (Recovery Time Objective): 4 hours.
* RPO (Recovery Point Objective): 24 hours.
* SLA should be at least 99.95%.
* Your monitoring tools and alerting strategy:
* Infrastructure monitoring: describe your tools/processes.
* Performance monitoring: do you use tools like Dynatrace / Datadog to understand/fix/monitor the performances of your clients’ applications?

## Technical support and maintenance

[Describe here what you expect from your provider in terms of technical support and maintenance]

We expect the following commitments:

* Support available Monday to Friday from 9:00 am to 6:00 pm, accessible via e-mail.
* Ticketing process, access through a portal to our current open tickets.
* Intervention and repair of the solution. This makes it possible to answer specific needs for support within intervention and repair periods, defined according to levels of anomaly --critical, major, or minor.

Correction periods will be as follows:

* 2 working days for critical anomalies,
* 3 working days for major anomalies,
* 5 working days for minor anomalies.

# Description of expected services

Beyond a SaaS solution whose hosting and maintenance are in the care of our partner, we expect this partner to assist us in the deployment of the solution and to propose a proven and pragmatic methodology.

## The setup phase

[Describe here the service delivery you expect from your provider, in terms of teams and methodology. It can help to describe what team (size, positions) you plan to have on your side. Example:]

We want to understand what type of project you propose to put in place for our need: team, methodology, planning.

Teams

On our side, we plan to have one person to be the “Product Owner” in this setup phase. He/she will collect and centralize the needs of all stakeholders, he/she will participate in all necessary meetings, make decisions, validate choices.

We’ll also have a reference person to represent IT, each time it will be required: SSO, interface to a 3rd party system, security/architecture questions.

We’ll invite other people in workshops depending on their agenda.

More people (5-8) will participate in testing the platform, and we would like to keep this team as key users (“champions”) of the solution later on, so our end-users will have a reference team for questions, trainings, assistance.

Please describe your own team, and the responsibilities.

Methodology

We are evolving in highly innovative and changing marketing and communication contexts, with business teams focusing on their production objectives. They are aware of their business priorities and need help in translating these into User Stories related to the future Media Library.

Therefore, we are looking towards **Agile project methodologies**:

* They help our team focus on priorities, and not spend too much time specifying low-level, low ROI needs.
* We’ll demand iterative deliveries, so we see the result of our choices often enough, and we can adapt all along the project.
* We need visibility though, and will not commit on a never-ending project. Ideally we can start with a platform that fits 80% of our needs, so we can test and learn, and make the right decisions in workshops.

Focus on data migration

[If you wish to integrate your existing assets into your new multimedia library, you can add to your specific requirements this part concerning data migration. Example:]

Please describe how you plan to migrate our existing assets into your platform.

Volumes can be found in the “useful figures” chapter.

We can collect our assets for you, and give you (on a FTP server for instance) all the binary files, and their current description.

[If your volumes are high (> 500,000 assets), you may want to add a specific section:]

How do you ensure the migration process in itself will not take too long in the planning, can we mutualize resources for instance?

We plan to provide a first set of assets (~10,000) to test the quality of the whole process, how do you suggest this could work?

Planning

[Insert here any hard deadline your vendors should know of.]

Please describe your best possible planning to setup our platform. How flexible is this? Can we imagine several phases in our project?

## Change management

We will need to train our key users to the platform. Please describe your proposal regarding change management.

We may also be interested by a specific training to indexing best practices: do you provide this service?

## Run period

Once the platform is live, we want to benefit from your technical support.

For bugs/issues discovered later, during the run period, please describe what type of applicative maintenance process you propose your clients, and to what financial conditions. Do you usually propose a warranty period (under which conditions), or is it possible to activate a budget to serve several purposes: bugs/issues/questions but also change requests if any?

Do you provide some Customer Success process in the long run? We would expect to be regularly informed on the usage of our platform, the opportunities for new features, and to give feedback from our users.

# Financial proposal

We need the Vendors to provide us with your best possible estimations in cost for:

* The yearly license costs involved, they must include usage, hosting, support.
* The setup costs.
* Any optional cost.
* Our usual payment conditions are: XXX

Please give us as many details as possible, we want to understand the logic of your pricing, and simulate our TCO (total cost of ownership) in case we contractualize for several years.

In our search for a SaaS solution, we also want to benefit from a Saas financial model: small usage / small fee, growing usage / growing fee. We do not want to be limited with our end-users, we believe an unlimited model for these users will benefit the success of the platform.