

## **REQUEST FOR PROPOSAL/ESTIMATE: OUTSOURCED IT SUPPORT NEEDS**

### **COMPANY DESCRIPTION**

REV (formerly True Market Solutions) is a training and education firm that integrates the best of sustainability with behavior change to accelerate business impact for small to mid-size organizations. By connecting people, expert resources, knowledge, and new and innovative thinking— in the context of peer-learning Sustainability Circles® — REV empowers businesses, municipalities, and institutions to co-create positive change in their organizations and broader community. See [www.revsustainability.com](http://www.revsustainability.com) for more details.

### **CURRENT STAFFING**

**Employees:** 12

**Contractors:** ~40

Both populations predicted to grow by 25 - 50% this year

### **LOCATIONS AND SET-UP**

REV is a virtual company. Both employees and contractors work from their homes (and/or cars, co-working spaces, and coffee shops). Physical locations are Northern and Southern California, as well as a small operation in the Midwest (Iowa and Kansas). We do not have a network. We use a variety of cloud-based applications, including Google Drive, Calendar, Hangouts, and Email; Insightly; Basecamp; Evernote, Join.me and GoToMeeting.

### **IT SERVICES DESIRED**

REV seeks to outsource help desk support, desktop support, and computer tech support. Currently these functions are the part-time responsibility of a REV Coach, and our size has now outstripped his available time. We want an IT Services company who cares about learning our business and our people, and is committed to giving us the smooth technology support that will allow us to accomplish our important sustainability mission. We are expecting the following detailed tasks to require 10 to 15 hours a week (currently), and want to ensure that there is adequate staffing for more support as we scale up.

1. New team member set-up, on-boarding
  - a. New Google user account
  - b. Basecamp and Insightly account set-ups
  - c. Groups assignments
  - d. Providing instructions
2. Team member removal, off-boarding
  - a. Close accounts

- b. Notifying staff member
    - c. Transfer ownerships (documents, calendars, etc.)
    - d. Set-up necessary email aliases or auto replies
  3. Develop and run trainings for various tools (Google Drive, Google Calendar, GoToMeeting, etc.)
  4. One-on-One Troubleshooting
    - a. New member set-up issues
    - b. Email/Gmail issues
    - c. Calendar issues (syncing, accepts/declines, etc.)
    - d. REV document issues
      - i. Individual documents
      - ii. Curriculum documents
    - e. Google Drive sync issues
    - f. Insightly and Basecamp issues
    - g. External system issues
      - i. Microsoft Word and Excel
      - ii. Microsoft Outlook
      - iii. Apple Mail
      - iv. Firefox, Safari, Chrome, Internet Explorer
      - v. Printing
    - h. Support OS of Mac and PC (various), as well as mobile devices (iOS and Android)
    - i. Quick response time needed - initial response within 1 hour, usual problems solved within 4 hours, more in-depth as promised/necessary
  5. REV Start page content (onboarding and general internal info tool)
    - a. Links, instructions, guides, tutorials, webinars
    - b. Page configurations and settings
  6. Manage Google Apps Admin
    - a. Account management
    - b. Drive configuration and settings
    - c. Calendar configuration and settings
    - d. Groups configuration and settings
    - e. Drive backup via Spanning Sync
    - f. Point of contact for Google Apps Support
  7. Management and support of additional tools
    - a. Account management and configuration, and one-on-one support
      - i. Web conferencing solutions (GotoMeeting, Join.me, Google Hangouts, etc.)
      - ii. Meeting Booking Tools (YouCanBook.me, others?)
      - iii. Learning Management System (Canvas)
  8. Software and tools assessment and development
    - a. Assess for compatibility and integration with existing systems
    - b. Recommend changes and/or upgrades as needed