

ITSM RFP template: requirements and scoring grid

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A ready-to-use structure for your ITSM tool request for proposal. Describe your context, send the requirements to the vendors and their partners, and score the answers with the same weighted grid for every tool. Delete what does not apply and add your own requirements.

How to use this template

Fill in sections 1 to 3 yourself: they tell the vendors who you are and what you need. Sections 4 to 12 are the requirements: give each one a priority (M = must, S = should, C = could) before you send the document.

Ask every vendor to answer each requirement with one of five words: Standard (works out of the box), Configuration (set up without code), Custom (needs development), Roadmap (planned, with a date) or No. Ask for a short comment wherever the answer is not Standard.

Then score the answers in section 14 and invite the two or three best tools to a scripted demo on your own use cases.

1. Your organisation

Organisation and entities in scope

Number of users supported · Employees and other people who raise tickets

Number of agents today and in three years · People who work on tickets, by team

Tickets per month · Incidents and requests, with peaks

Languages needed · Portal, agent interface, notifications

Locations and support hours

Current tool and contract end date

2. Scope and objectives

Why you are changing or buying a tool · The problems the new tool must solve

ITIL processes in scope

Departments outside IT in scope · HR, facilities, finance, others

Target go-live date

Budget range over three years

Decision makers and evaluation team

3. RFP timeline

Step	Date
RFP sent to vendors and partners	
Deadline for vendor questions	
Deadline for answers	
Shortlist announced	
Scripted demos on your use cases	
Proof of concept (optional)	
Decision and contract signature	

4. ITIL process coverage

ID	Requirement	Priority (M/S/C)	Vendor answer	Comment
R-01	Incident management with a priority matrix (impact x urgency), a major-incident procedure and on-call notifications			
R-02	Service request management with a service catalogue, request forms and approval workflows			
R-03	Problem management with root-cause analysis, known errors and links to incidents and changes			
R-04	Change enablement with a change calendar, risk assessment, approvals (CAB) and standard changes			
R-05	Service level management: SLAs and OLAs per priority and service, pause rules and breach alerts			
R-06	Knowledge management: article lifecycle, approval and search from the portal and the agent console			
R-07	Listed in PeopleCert's ITIL 4 certified-software register: state the level and the certified practices			

5. Enterprise service management

ID	Requirement	Priority (M/S/C)	Vendor answer	Comment
R-08	HR, facilities, finance or other departments can run their own services on the same platform			
R-09	Separate catalogues, portals, workflows and permissions per department			
R-10	Licence cost of agents outside IT, and of occasional or approver-only users			

6. CMDB and IT asset management

ID	Requirement	Priority (M/S/C)	Vendor answer	Comment
R-11	CMDB data model: configuration item classes, attributes and relationships, with an impact view			
R-12	Discovery: native agent or scanner, or connectors to discovery and device-management tools (state which)			
R-13	Hardware and software asset lifecycle, contracts, warranties and software licences			
R-14	How configuration data stays up to date without manual work, and who owns each source			

7. Integrations

ID	Requirement	Priority (M/S/C)	Vendor answer	Comment
R-15	Directory synchronisation (Entra ID or Active Directory), single sign-on (SAML or OIDC) and SCIM provisioning			
R-16	Email in and out: tickets from mailboxes, replies and notifications			
R-17	Microsoft Teams or Slack: create and follow tickets, approve requests			
R-18	Monitoring tools: alerts turned into incidents automatically, with de-duplication			
R-19	REST API coverage, webhooks and rate limits for everything else			
R-20	Named systems we need connected (ERP, HR system, others): list them here			

8. AI and automation

ID	Requirement	Priority (M/S/C)	Vendor answer	Comment
R-21	No-code workflow builder for routing, approvals and repetitive tasks			
R-22	AI for agents: ticket classification, summaries and suggested answers			
R-23	Virtual agent for users in the portal or in Microsoft Teams			
R-24	AI pricing (included or extra) and where AI data is processed			

9. Hosting, security and EU data

ID	Requirement	Priority (M/S/C)	Vendor answer	Comment
R-25	Hosting region in the EU (name the data centre) and the published list of sub-processors			
R-26	Security certifications (ISO 27001, SOC 2): provide the certificate or the latest report			
R-27	GDPR data processing agreement, and support for your NIS2 incident reporting where it applies			
R-28	Single sign-on, multi-factor authentication, role-based access and an audit log			
R-29	Data export at the end of the contract: format, completeness and cost			

10. Reporting

ID	Requirement	Priority (M/S/C)	Vendor answer	Comment
R-30	Built-in dashboards and scheduled reports for agents, team leads and management			
R-31	Power BI connector or a complete data export for your own reporting			

11. Usability and adoption

ID	Requirement	Priority (M/S/C)	Vendor answer	Comment
R-32	Portal and agent interface available in the languages listed in section 1			
R-33	Mobile app for agents and for users			
R-34	A scripted demo of three of our use cases (we provide the scenarios)			

12. Implementation, partner and support

ID	Requirement	Priority (M/S/C)	Vendor answer	Comment
R-35	Implementation plan with phases, durations, roles and what we must provide			
R-36	Implementation partner in our region, with references of a similar size and sector			
R-37	Vendor support: hours, languages, response times and escalation			
R-38	Training for agents, process owners and administrators			
R-39	Migration of our data: open tickets, history, knowledge articles and CMDB			

13. Price over three years

Ask every vendor to fill in this table in euros, excluding VAT, and to state the licence model (named or concurrent agents, users), the minimum term and any cap on price increases.

Cost item	Year 1	Year 2	Year 3	Notes
Licences				
Options and add-ons (AI, discovery, ESM, extra environments)				
Implementation services				
Integrations				
Data migration				
Training				
Support and maintenance				
Total				

14. Scoring grid

Score each tool from 0 (not met) to 5 (fully met) per criterion, multiply by the weight and add up. The weights below are an example: set yours before the answers arrive, so the grid cannot be bent towards a favourite.

Criterion	Weight	Tool A	Tool B	Tool C
ITIL process coverage (section 4)	20%			
Enterprise service management (section 5)	5%			
CMDB and IT asset management (section 6)	10%			
Integrations (section 7)	15%			
AI and automation (section 8)	10%			
Hosting, security and EU data (section 9)	10%			
Price over three years (section 13)	15%			
Partner and support (section 12)	5%			
Usability and adoption (sections 10 and 11)	10%			
Weighted total	100%			

Want a second pair of eyes on your RFP?

SMC Consulting writes the requirements and the scoring grid with you, compares the platforms that fit your context and runs the selection through to the final demos. Start with a first shortlist: a few questions, then a talk with a senior ITIL v4 certified consultant.

[Get my ITSM shortlist →](#)