



Draft. Comply. Govern

THE MICROSOFT SUPPORT RFP REWRITE KIT

*Build a fair, outcome-based
RFP before your next
Unified Support renewal.*

*A practical guide and editable working
template for competitive Unified
Support renewals!*

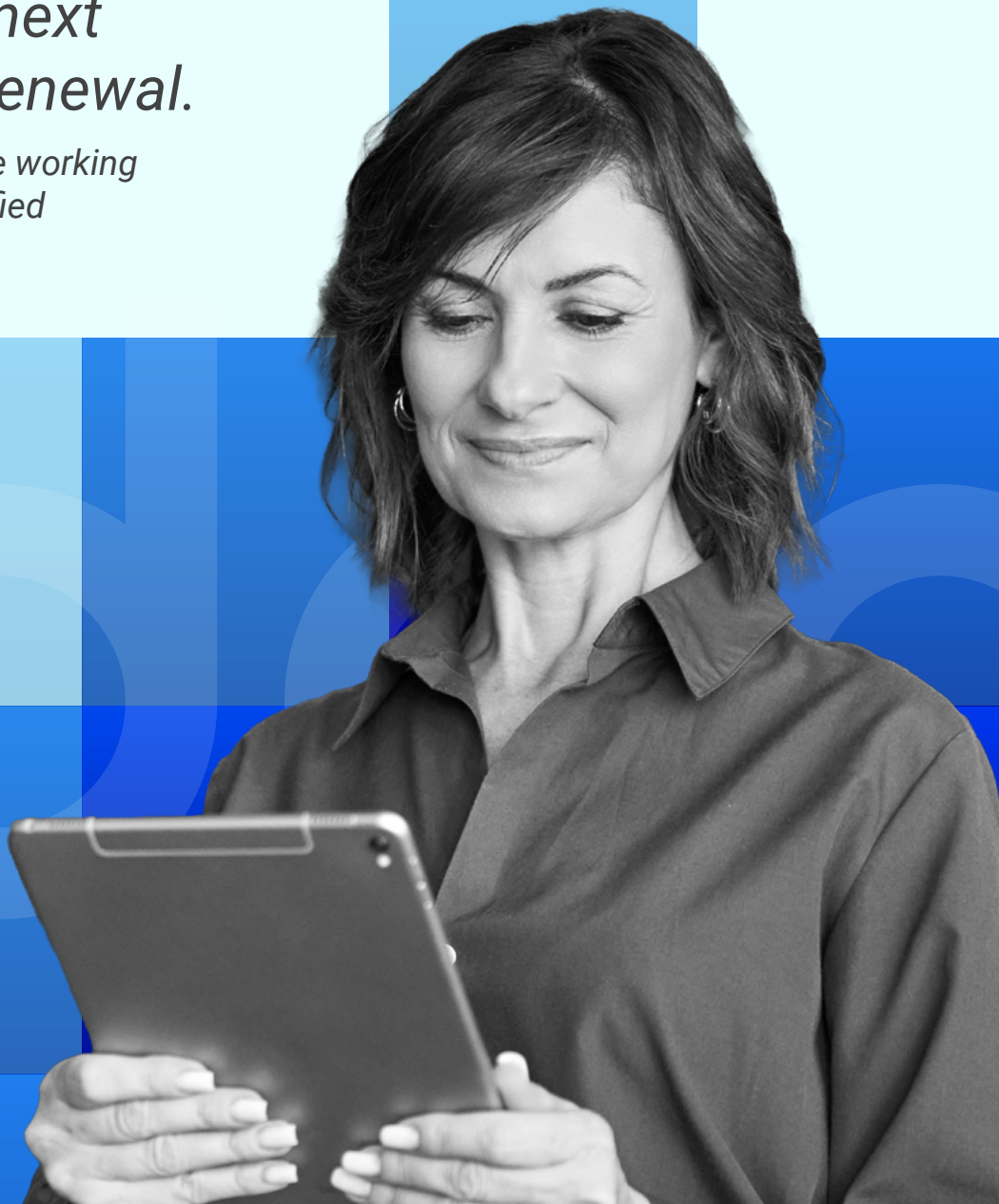


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PART

01

The Guide





1. Why Most Unified Renewal RFPs Are Structurally Sole-Source

Most Unified Support renewal RFPs begin as a copy of the last one, carrying forward language built around how Microsoft itself describes Unified Support: Core, Advanced, and Performance tiers, named roles like Customer Success Account Manager (CSAM), and hour-based pricing tied to annual software spend. Nobody decides to write the competition out; it just gets inherited, cycle after cycle, until any alternative provider runs into requirements only Microsoft can literally satisfy, since those are Microsoft’s own internal titles and pricing mechanics.

As a practical example, South Carolina’s Office of State Procurement flagged this exact pattern, citing multiple protests over sole-source acquisitions of Microsoft Unified Support Services, several filed directly by DCG. The state has since acknowledged, in writing and is moving toward competitive procurement.

Microsoft remains a legitimate, often strong bidder for its own support product, and an open RFP can still land on Unified as the winner. Write criteria around outcomes, like time-to-engineer contact and financially-backed commitments, so any qualified provider can respond on equal footing without renaming staff to match a Microsoft org chart.

2. Seven Places Vendor-Lock Hides in Your RFP

These are the clause patterns most likely copied forward from a Microsoft-shaped template. Each pairs common language with an outcome-based rewrite any qualified provider can answer.

Named Escalation Role Requirement

COMMON LANGUAGE	OUTCOME-BASED REWRITE
“Vendor shall provide a dedicated Customer Success Account Manager (CSAM) as the primary point of contact for service escalations.”	“Vendor shall identify the role or roles responsible for account ownership, escalation coordination, and technical resolution. The response must describe decision authority, availability, continuity expectations, escalation response times, and when senior engineering resources become engaged”

Why it matters: A named role requirement becomes restrictive when the RFP treats a vendor-specific title, such as CSAM, as the required proof of account ownership or escalation capability. Other providers may offer the same or stronger outcome through named service managers, dedicated escalation leads, senior engineers, or account-based support teams, but fail the requirement because their staffing model uses different titles. The RFP should evaluate ownership, continuity, escalation authority, response expectations, and technical depth rather than requiring one vendor’s internal role name.

Tier-Name Requirement

COMMON LANGUAGE	OUTCOME-BASED REWRITE
"Vendor's support offering must be provided at the Advanced or Performance tier."	"Vendor's support offering must guarantee a 1-hour response time for critical incidents and a 4-hour response time for standard incidents, with financially backed remedies for missed targets."

Why it matters: Naming Microsoft's tier structure assumes the buyer needs that packaging, not the service level.

Contract Value Tied to Software Spend

COMMON LANGUAGE	OUTCOME-BASED REWRITE
"Annual support fees will be calculated as a percentage of the organization's annual Microsoft software and cloud spend."	"Vendor shall propose a pricing model that clearly maps cost to expected support usage, coverage requirements, escalation needs, and service commitments. Pricing should identify included hours or service capacity, treatment of unused capacity, overage handling, renewal flexibility, and any assumptions tied to the organization's technology footprint or historical ticket volume."

Why it matters: Percentage-of-spend pricing can disconnect support cost from actual support usage. If the organization's Microsoft spend increases, the support cost may increase even when ticket volume, escalation demand, or required service coverage does not. A vendor-neutral RFP should let bidders explain how pricing maps to actual consumption, coverage needs, ticket history, critical incident demand, and unused capacity so procurement can compare cost-to-value instead of simply accepting a spend-based formula.

"Unlimited Hours" Language

COMMON LANGUAGE	OUTCOME-BASED REWRITE
"Vendor must provide unlimited reactive support hours across the Microsoft technology stack."	"Vendor must describe its support hour allocation model and demonstrate how it accommodates the organization's historical ticket volume, stated in Section 5, without additional fees."

Why it matters: "Unlimited hours" describes one vendor's packaging; other models can demonstrate adequate coverage just as concretely.

Internal Engineering Access Requirement

COMMON LANGUAGE	OUTCOME-BASED REWRITE
"Vendor must provide direct escalation access to the product engineering group responsible for the affected Microsoft technology."	"Vendor shall describe its escalation model for issues requiring senior engineering or Microsoft product-level intervention, including escalation criteria, maximum escalation timeframes, customer communication expectations, and how the vendor manages Microsoft escalation on the customer's behalf when genuinely needed."

Why it matters: An RFP shouldn't require a provider to mirror Microsoft's internal escalation structure, but it should require a clear, measurable path to engineering-level intervention. Qualified providers resolve most issues through their own senior Microsoft-certified engineering teams and escalate to Microsoft's product groups only when product-level intervention is genuinely required. The evaluation should test whether the provider knows when to escalate, manages that escalation effectively, and keeps the customer informed throughout.

Contract Term Mirroring the Licensing Cycle

COMMON LANGUAGE	OUTCOME-BASED REWRITE
"The awarded contract term shall align with the organization's existing three-year Enterprise Agreement cycle, renewing concurrently."	"Vendor shall propose contract term options (e.g., 1, 2, or 3 years) and describe any transition assistance provided if the organization changes providers at the end of the term."

Why it matters: Aligning a support contract's term to a licensing agreement's renewal cycle can be a legitimate operational need. Copied forward without a second look, though, it can also quietly assume support and licensing must be bundled with the same provider. Microsoft itself will decouple Enterprise Agreement and Unified Support renewal timing on request, though it won't offer to do so proactively, so buyers already have more flexibility here than a bundled renewal clause implies.

No Financial Remedy Language

COMMON LANGUAGE	OUTCOME-BASED REWRITE
(Silence. The RFP contains no SLA remedy clause at all, mirroring a response-time "goal" with no guarantee behind it.)	"Vendor shall specify whether its SLA includes financially backed remedies for missed response or resolution targets and describe the remedy structure."

Why it matters: An RFP that never asks the question defaults to accepting a response-time goal with no consequence for missing it. That may be standard for one vendor's own plan. It isn't necessarily the standard every bidder should be held to.



3. Vendor-Neutral Evaluation Checklist

Run your draft RFP against this list before it goes out. Each item tests whether a requirement describes an outcome your organization needs, or a feature of one vendor's specific packaging.

Escalation requirements describe response times and technical seniority, not a named Microsoft role or title (CSAM, Technology Advocate, Designated Support Engineer).

Support tier or packaging names (Core, Advanced, Performance) do not appear as mandatory requirements.

Pricing structure is open to fixed-fee, hours-based, or consumption-based models, not restricted to percentage-of-software-spend.

Hour and coverage requirements are stated as the volume or coverage window your organization needs, not as "unlimited" language copied from one vendor's marketing.

Any certification or partner-status requirement is tied to a demonstrated technical need, with equivalent alternate credentials accepted.

Escalation-path requirements describe timeframes and seniority, not access to a specific vendor's internal engineering group.

Contract term options are open to negotiation rather than fixed to match an existing licensing cycle.

The RFP explicitly asks whether the vendor's SLA includes financially backed remedies.

Evaluation criteria are weighted and published to bidders before proposals are due.

Evaluation criteria reward demonstrated outcomes (resolution time, uptime, verifiable references) over brand recognition.

At least one reviewer without responsibility for the current vendor relationship has reviewed the scope language.

Market research supporting any requirement that could narrow the field has been documented in writing.

The RFP has been checked against your organization's own competitive-bid policy, not just against the prior cycle's template.

4. For Public-Sector and Compliance-Bound Procurement

Under formal public procurement rules (government, a public university, or an enterprise with similar policy), an unintentionally sole-sourced RFP carries a specific risk: a bid protest, an audit finding, or a finding that a supposedly competitive process wasn't.

The U.S. Competition in Contracting Act (CICA) and equivalent state rules require full and open competition unless a documented exception applies. GAO has repeatedly sustained protests where an agency restricted a solicitation to one brand without documenting why no other product could meet the need, including a protest against a federal agency's plan to keep sole-sourcing software support to its incumbent vendor over inadequate advance planning. Legitimate sole-source procurement remains valid for genuine technical incompatibility, a narrow performance window, or a provably unique service; this guidance addresses the more common scenario, an RFP never meant to exclude alternatives but built on inherited language that does so anyway.

Practical steps for a defensible record:

- Document the market research behind any field-narrowing requirement: who else was considered, and why.
- Replace brand-specific terminology with the outcome it was meant to guarantee, and route the draft through a reviewer who isn't the incumbent's internal advocate.
- Record how evaluation criteria were chosen and weighted before proposals arrive, not after.

A rewritten scope section takes an afternoon. Responding to a sustained protest takes considerably longer, and the first protest in your sector may already be on file.

PART

02

The Working Template

These sections are built to be edited directly; most fields take a sentence or two.



5. Editable Scope of Work

Scope of Work: Microsoft Ecosystem Support Services

Environment Overview
Support Coverage Required
Response & Resolution Targets
Escalation Requirements
Financially-Backed Commitments
Staffing & Continuity
Contract Flexibility
Reporting & Governance

6. Evaluation Criteria and Scoring Rubric

Weights are illustrative starting points; adjust them and publish the final weighting before proposals are due.

Category	Weight	What It Measures
Response & Resolution Performance	25%	Demonstrated response and resolution times against your stated targets; track record via references or case examples.
Escalation & Technical Depth	20%	Clarity of the escalation path, seniority of escalation contacts, and time to engineering-level intervention.
Contract Flexibility & Accountability	15%	Contract term options, transition support, and presence of financially backed SLA remedies.
Cost Transparency	15%	Clarity and predictability of the pricing model relative to your organization's actual support volume.
Compliance & Security	15%	Data handling practices, security certifications, and alignment with your regulatory requirements.
Vendor Experience & References	10%	Relevant experience and verifiable references from organizations of comparable size and industry.

7. Standardized Bidder Question Set

Send the same questions to every bidder, and score responses against the Section 6 rubric.

Response and Service Levels

1. What response times do you commit to by severity level?
2. What resolution targets or escalation targets do you track by severity level?
3. Does your SLA include financially backed remedies for missed commitments?

Escalation and Engineering Depth

4. Describe your escalation path from first contact to senior engineering involvement.
5. When do you escalate to Microsoft product groups, and how do you manage that process for the customer?
6. What certifications, experience levels, or specializations are represented on the team supporting comparable accounts?

Coverage, Capacity, and Continuity

7. What coverage windows are available, and how do they align to our stated support needs?
8. How does your model handle ticket volume above initial estimates?
9. How do you maintain continuity of support staff and account knowledge over the contract term?

Commercial, Governance, and Risk

10. Describe your pricing model and how it maps to actual support usage.
11. What contract term options, renewal provisions, and transition support do you offer?
12. What reporting, service review, data handling, and compliance practices are included by default?

Working With DCG

DCG works with internal teams before an RFP goes out, helping rewrite scope and evaluation language while it's still in draft, and after, responding to RFPs once they're live. Either way, the goal doesn't change: a competitive process is decided on outcomes, regardless of who ultimately wins it.

If you'd like a second set of eyes on a draft RFP or want to talk through evaluation criteria before you publish, DCG is glad to help.

[Request a DCG Consultation](#)



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