

Request for Information Template

Step-by-step guide + customizable RFI for early-stage IT vendor research.

An RFI is the cheapest mistake-avoidance tool in IT procurement. Spend a few hours issuing one, save weeks of wasted RFP cycles. This guide walks you through when to issue an RFI, how to write one that gets real answers, and how to evaluate responses.

This template is published free by SRS Networks for IT buyers exploring an unfamiliar technology category, narrowing a vendor list, or educating internal stakeholders before committing to a formal RFP. Every [PLACEHOLDER] is yours to customize — and every section is followed by a Why this matters sidebar, an Example, and a Common mistake to avoid.

Template Title	Request for Information (RFI) — IT Discovery Questionnaire
Version	v2.0 (Practitioner Edition)
Audience	IT buyers, procurement leads, project managers, business sponsors
Best Used When	Exploring a category · Narrowing a vendor list · Educating stakeholders
Recommended Length	6–8 pages of substantive content (this template prints to ~15)
Typical Cycle	4 weeks from issue to shortlist
Published By	SRS Networks — Salinas, CA — Operating since 1996

HOW TO USE THIS TEMPLATE

This template is structured as a 5-step workflow. Steps 1–2 happen before you write a single word; Step 3 is the writing itself; Steps 4–5 are how you distribute and evaluate. Skipping Steps 1–2 is the #1 reason RFIs come back with useless answers.

STEP 1. Decide if an RFI is actually the right tool

Issue an RFI when you don't yet know what you want, who the serious vendors are, or what a project like this typically costs. Do NOT issue an RFI when you already know all three — go straight to RFP. RFIs are educational; RFPs are competitive.

STEP 2. Identify 8–15 vendors worth asking

Pull names from: existing peer relationships, BICSI member directory, manufacturer partner locator pages (e.g., Cisco Partner Locator), trade publications, and prior vendor outreach. Fewer than 8 and you won't see range. More than 15 and you'll drown in responses.

STEP 3. Customize this template

Replace every [PLACEHOLDER] with your specifics. Delete questions that don't fit your scenario. Add 1–3 questions specific to your industry or risk profile. Keep the total under 10 questions — vendors triage long RFIs to the bottom of the queue.

STEP 4. Distribute with a clear deadline and a single contact

Send the RFI as a PDF attachment with a 2–3 week response window. Designate one point of contact for vendor questions and commit to sharing answers with all bidders. Tell vendors explicitly what happens next (shortlist for RFP, expected timeline, no contract awarded).

STEP 5. Score responses and shortlist 3–5 for the formal RFP

Use the evaluation rubric at the end of this template. Score each response 1–5 against four criteria: vertical experience, depth of answer, evidence of operational discipline, and transparency about pitfalls. Shortlist the top 3–5 and notify all responders within 2 weeks.

PRO TIP FROM SRS NETWORKS

The vendors who give you the most useful RFI responses are not always the ones with the fanciest decks. Look for specific numbers, specific war stories, and specific opinions about what could go wrong. Generic marketing copy is a tell that the vendor doesn't actually know your space.

SUGGESTED 4-WEEK RFI TIMELINE

An RFI that runs longer than 4 weeks loses momentum and signals to vendors that you're not serious. An RFI that runs shorter than 2 weeks doesn't give vendors time to write a thoughtful response. The cadence below is what SRS Networks has seen produce the best signal-to-noise ratio.

Week	Buyer Activity	Vendor Activity
Week 0 (Prep)	Finalize template, list of 8–15 vendors, single point of contact	—
Week 1	Distribute RFI. Send to vendors via email PDF. Set deadline.	Receive RFI, evaluate fit, decide whether to respond
Week 2	Field vendor clarifying questions. Share Q&A with all bidders.	Draft response, gather references
Week 3	Responses due Friday EOD. Begin independent scoring.	Submit response
Week 4	Score and shortlist. Notify all responders. Schedule shortlist debriefs.	Receive shortlist decision

COMMON MISTAKE

Do not let an RFI drag past 6 weeks. Top vendors will deprioritize you. If you genuinely need more time, issue an addendum extending the deadline rather than letting it slip silently.

1.0 ABOUT US AND WHY WE'RE ASKING

WHY THIS MATTERS

Vendors size their response (and decide whether to bother) based on who you are and what you're trying to learn. Vague intros get vague responses. Specific intros — with footprint, industry, and a clear ask — get specific responses you can actually use.

Our Organization

Organization name: *[Your company]*

Industry / vertical: *[]*

Approximate footprint: *[e.g., 50 sites across 12 states]*

IT team size: *[]*

Key stakeholders for this initiative: *[e.g., CIO, VP Infrastructure, VP Stores Operations]*

EXAMPLE

Good: "We are a 50-location specialty retailer headquartered in Charlotte, operating primarily across the Southeast US. Our IT team is 8 people; we partner with an MSP for tier-1 helpdesk. We are exploring a network refresh to replace aging Catalyst 2960s." Bad: "We are a growing company looking for technology partners."

Why This RFI

Be transparent: tell vendors why you're issuing this RFI now and what you intend to do with their responses.

Technology category we're exploring: *[e.g., SD-WAN, multi-site Wi-Fi, zero-trust networking, DAS]*

What we're trying to learn: *[e.g., What's possible, what typical deployments look like, who serious vendors are]*

What happens after responses: *[e.g., Shortlist 3–5 vendors for formal RFP within 4 weeks of RFI deadline]*

COMMON MISTAKE

Do not promise a contract award based on RFI responses. RFIs are not legally a competitive bid in most jurisdictions, and vendors will price defensively if they think they're being committed prematurely. State explicitly: this is for discovery only.

Expectation to set with vendors: "This RFI is for discovery and shortlisting only. We will not award contracts based on RFI responses. Shortlisted vendors will receive a formal RFP within 4 weeks of the RFI deadline."

2.0 THE BUSINESS PROBLEM WE'RE SOLVING

WHY THIS MATTERS

The single most predictive signal of a useful RFI response is whether the vendor understands your business problem — not your technology problem. Vendors who can translate "we want to deploy POS faster" into the right network architecture are the ones worth shortlisting.

Describe in 2–3 paragraphs the actual business problem driving this exploration. Avoid technology jargon — focus on the business outcome you're seeking. The technology recommendation should be the vendor's job, not yours.

Current pain point: *[Replace with 1–2 sentence problem statement]*

Business outcome we want: *[Replace with what success looks like]*

Constraints worth knowing: *[e.g., Budget approval expected Q3, must avoid forklift upgrades, regulated environment]*

WHAT A STRONG BUSINESS PROBLEM LOOKS LIKE

Good: "Today, opening a new retail location takes 6 weeks for IT to provision the network. Our growth plan calls for 12 new stores per year — we cannot scale at this cadence. We need a network architecture that lets us provision a new store in under 2 weeks end-to-end." This tells the vendor the outcome (sub-2-week store opening), the constraint (12/year), and implicitly invites them to propose the right architecture.

COMMON MISTAKE

Avoid technology shopping lists at this stage. Saying "we need SD-WAN with 1Gbps backhaul and zero-touch provisioning" gives vendors no room to propose something better. Say what you're trying to achieve, and let them tell you how.

3.0 DISCOVERY QUESTIONS FOR VENDORS

Please answer each question concisely (1–3 sentences per answer). We'll use these to evaluate fit and shortlist for a future RFP.

WHY THIS MATTERS

Each of the 10 questions below is followed by a "What a great answer looks like" note. Use these notes when scoring responses. The pattern: great answers are specific, quantitative, and acknowledge tradeoffs. Generic answers are a polite no.

Capabilities and Experience

Q1. Briefly describe your firm's experience deploying [TECHNOLOGY CATEGORY] for organizations of similar size to ours.

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q1 ANSWER LOOKS LIKE

"In 2025 we deployed [TECHNOLOGY] across 38 sites for a regional grocery chain (similar footprint to yours) and 90 sites for a specialty retailer in the Northeast. Average deployment was 14 calendar days per site with a 2-tech crew. Happy to share both as references." Numbers, specificity, willingness to share references — this is what good looks like.

Q2. What's a typical project timeline for a deployment of this scope (rough estimate, not commitment)?

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q2 ANSWER LOOKS LIKE

"For a 50-site rollout with no special access constraints, we typically run 6–8 weeks from PO to substantial completion. The longest pole is site survey scheduling, which adds 2 weeks if we can't access sites during business hours." Vendors who can name the longest pole have actually done the work.

Q3. What are the most common pitfalls you see organizations encounter when deploying this technology for the first time?

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q3 ANSWER LOOKS LIKE

"Three most common: (1) pathway and fire-stopping treated as 'out of scope,' which surfaces as a 15% change order; (2) no pre-deployment site survey, leading to drop count errors on 20% of sites; (3) hardware procurement on the buyer's PO, which means hardware arrives 3 weeks after the install crew." Vendors who name the pitfalls openly are the ones who've earned them the hard way.

Q4. What's your typical project team structure for a deployment like this?

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q4 ANSWER LOOKS LIKE

"Dedicated PM single point of contact, 1 lead tech + 1 helper per site (W-2 employees, not 1099 subs), and a remote site coordinator coordinating site access. Project Command Center operates 6am-6pm Pacific for any field escalation." Watch for W-2 vs. subcontracted crews — the answer tells you who's actually doing the work.

Q5. What integrations or dependencies should we plan for that aren't obvious to first-time buyers?

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q5 ANSWER LOOKS LIKE

"Two non-obvious dependencies: (1) your DHCP/DNS team will need to be involved 1 week before first-site cutover; (2) if you have a managed-services contract on existing equipment, your MSP needs to release control of the existing switches or we'll be locked out of remote config. We've been blocked on (2) before — name your MSP now and we'll coordinate."

Budget, Coordination, and References**Q6. What's a typical 2026 budget range for a deployment of this scope (rough order-of-magnitude only)?**

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q6 ANSWER LOOKS LIKE

"For 50 sites with average 35 drops per site, we'd expect total project cost in the \$650k-\$950k range, all-in (materials, labor, PM, mobilization). The range is driven by cabling spec (Cat6 vs Cat6A), site access constraints, and after-hours work requirements." Vendors who give you a range with the drivers behind it are signaling competence.

COMMON MISTAKE

Some vendors will refuse to give an ROM at RFI stage. That is a yellow flag — top firms can give a 30-40% range with confidence after one phone call. If a vendor says "we'll know after the site survey," they may not have enough comparable deployments to anchor a range.

Q7. How do you typically handle multi-site coordination across [GEOGRAPHIC SCOPE]?

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q7 ANSWER LOOKS LIKE

"Single PM coordinates all sites from our Project Command Center. We schedule in 2-week waves of 8-10 sites and run a Friday weekly status call. All site dispatches, ETAs, and completion confirmations go through a single shared tracker your team can access live."

Q8. What references can you provide for similar deployments in our industry vertical?

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q8 ANSWER LOOKS LIKE

"Three references in retail, all within the past 18 months, all multi-site over 25 locations. We'll share contact info on shortlist; happy to coordinate reference calls. Two are willing to host you for a half-day site visit if useful." Vendors who offer site visits are vendors with no skeletons.

Q9. What questions should we be asking that we haven't?

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q9 ANSWER LOOKS LIKE

"Two we'd add: (1) what's your warranty / re-test policy if a drop fails after handoff? (2) what's your change-order process when scope expands mid-project? These two questions predict 80% of post-award friction." This question filters for vendors who have opinions, not just answers.

Q10. What's your typical change-order process when scope expands during deployment?

Vendor response: *[Vendor fills in]*

WHAT A GREAT Q10 ANSWER LOOKS LIKE

"All change orders go through a written CO request signed by both parties before work begins. T&M rates are published in the original proposal so there are no surprises. We document the scope delta with photos and a redlined floor plan. Average CO frequency on our retail rollouts is under 8% of original contract value."

4.0 ABOUT YOUR FIRM

WHY THIS MATTERS

This section is your fraud filter. Crews-of-one and broker-only firms will resist answering specifics about field tech bench, W-2 vs subcontractor mix, and insurance coverage. Real operating firms answer in seconds because they already have the numbers.

Company Information

Company legal name: *[Vendor fills in]*

Year founded: *[]*

Number of full-time field technicians: *[]*

W-2 vs subcontractor mix: *[]*

Geographic coverage: *[]*

Headquarters location: *[]*

Sister companies / subsidiaries: *[]*

Certifications and Insurance

Manufacturer certifications: *[e.g., Cisco Gold, Meraki CMNA, Aruba ACMP]*

Industry certifications: *[e.g., BICSI RCDD, OSHA 10/30]*

Insurance coverage: *[e.g., \$2M GL, \$1M E&O, workers' comp in all 48 states]*

COMMON MISTAKE

Red flags in Section 4: (a) refusal to disclose W-2 vs subcontractor mix; (b) certifications named at the company level but not at the technician level; (c) workers' comp coverage limited to home state only on a national rollout. Any of these warrants a follow-up question.

5.0 SUBMISSION INSTRUCTIONS

WHY THIS MATTERS

Be specific about how you want responses delivered. Vague submission instructions mean every vendor submits in a different format, which makes scoring impossible.

Response deadline: *[Friday MM/DD/YYYY 5:00 PM local time]*

Submission method: *[e.g., Email PDF to procurement@yourcompany.com]*

Response format: *[e.g., PDF, max 8 pages, Arial 11pt minimum]*

Single point of contact: *[Name, title, email, phone]*

PRO TIP FROM SRS NETWORKS

Cap response length at 8 pages. Vendors will fight for the limit and you'll get sharper thinking. Uncapped RFIs come back as 40-page marketing decks you'll never read.

AFTER YOU RECEIVE RESPONSES

An RFI is only valuable if you actually evaluate the responses. The 1-5 scoring rubric below is what SRS Networks recommends. Score independently with 2-3 evaluators, then reconcile.

Criterion	1 = Weak	3 = Average	5 = Strong
Vertical experience	Generic claims, no named references in your industry	Some named references in adjacent verticals	Multiple recent named references in your exact vertical, willing to host a visit
Depth of answer	Generic marketing copy, no specific numbers	Some specifics, mostly safe answers	Specific numbers, named pitfalls, opinion offered without being asked
Operational discipline	No PM model, unclear team structure	PM identified but unclear coordination model	Named PM + single-point coordination + shared tracker model
Transparency about risk	Claims everything is easy, no pitfalls named	Mentions 1-2 generic pitfalls	Names 3+ specific pitfalls, including ones their own firm has hit

PRO TIP FROM SRS NETWORKS

After scoring: invite the top 3-5 vendors to a 30-minute clarification call. Use the call to probe answers you scored 4 or below on "Transparency about risk." The conversation will either confirm the score or save you from awarding to a firm that hides problems.

Communicate Results to All Responders

Every vendor who responded deserves a 2-sentence email telling them whether they made the shortlist. This is professional courtesy and protects your reputation for the next RFI you issue. Vendors talk to each other; how you treat the not-shortlisted ones gets reported back.

ABOUT THIS TEMPLATE

Published free by SRS Networks - nationwide structured cabling and IT infrastructure deployment, all 48 contiguous US states since 1996. 500+ deployments, 5,000+ sites. We respond to RFIs and review buyer RFIs at no cost.

Want SRS Networks to review your draft before publishing? Email partners@srsnetworks.com or call **(866) 224-3636**. Returned within 3 business days at no cost — no obligation to bid.

More IT procurement resources at [srsnetworks.com/what-is-an-rfi-for-it-projects](https://www.srsnetworks.com/what-is-an-rfi-for-it-projects)