TRAVEL MANAGEMENT RFP TEMPLATE

RFP Objectives

Our goal is to find a TMC that can provide the following services to enhance our travel program:

- Exceptional consultative account management, including virtual and face-to-face meetings and ideas on how to continually improve our travel program and realize savings

- Superb travel management technology including software integrations

- Easy-to-access and -visualize real-time data for reporting and our travel management program

- Optimal services for our travelers and travel arrangers, including duty-of-care, travel alerts and notifications, and access to upgrades and benefits

- Travel advisors and an online booking tool that guide a traveler/arranger to the most cost-efficient options within policy

- An online booking tool that is customizable for our organization and includes certified technical support

- Simplified and transparent pricing

RFP Schedule

EVENT	RESPONSIBILITY	DATE/TIME
Issue RFP	Organization	XX/XX/XXX
Submit RFP Questions	TMC	+ 2 weeks
Provide Responses to RFP Questions	Organization	+ 1 week
Submit Proposals	TMC	+ 1 week
Select Finalists	Organization	+ 1 week
Invite Presenters	Organization	+ 1 week
Conduct Presentations	TMC	+ 1 week
Award Contract	Organization	+ 1 week

CLIENT Travel Management Services Request for Proposal Template
Provided by Christopherson Business Travel
www.cbtravel.com

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RFP Evaluation Criteria

Proposals will be evaluated and ranked based on the following criteria.

1. **Consultative Account Management.** We expect that a single account manager will serve as the primary point-of-contact for our account and have overall responsibility for implementation success, meeting desired levels of online adoption, ongoing account management, account reviews, reporting, vendor negotiations, and ideas for program improvement.

2. **Technology.** We require up-to-date technology for travel management, including an online booking tool, reporting tools, a traveler tracking tool, trip-disruption notifications, and unused ticket management. Our ideal TMC has a team dedicated to improving technology and making enhancements based on client feedback.

3. **Traveler Duty of Care and Risk Management.** We require 24/7 support, travel alerts, traveler safety verification, and links to travel-related pandemic information.

4. **Reporting.** We require access to on-demand reporting with real-time data and the ability to send custom reports to travel managers, accounting personnel, and department managers on an automated schedule.

5. **Service and Experience.** We expect excellent service, including high customer satisfaction and short call wait times, as well as a highly experienced travel advisor team who understands our policy and provides in-policy recommendations to travelers.

Additional consideration will be given to underutilized business classifications, such as small business and minority-, veteran-, and women-owned businesses.

RFP Criteria Ranking

CRITERION	POINTS POSSIBLE	POINTS SCORED
TOTAL	**100**	

Request for Proposal (RFP)

Submitted By:

Primary Contact Name:

Contact Information:

A. Company Structure & General Information

1. What is the legal name of your company?

2. Where are your company headquarters and principal business locations?

3. Please describe the ownership structure of your company. If your business is classified as an underutilized business, what is your designation? Please include an organizational chart.

4. Describe the history of your firm, including your current executive team and number of employees.

5. Please describe the key competitive differentiators or advantages of working with your company.

6. What is your technology strategy? How do you keep pace with changes in the travel industry?

B. References

1. If selected as a finalist, please provide three references for clients of similar size and scope to our account. Include client name, type of business, the number of years you have serviced the account, and the services provided, as well as a client contact name, email address, and phone number.

2. Provide an example of a successful travel program.

C. Customer Service

1. How long has your company been managing corporate travel?

2. Does your company work with SAP Concur, and if so, how? Is your company an SAP Concur Elite Partner?

3. Describe your procedures for monitoring client satisfaction.

    a. What are the feedback channels for travelers?

    b. What are the feedback channels for travel managers?

    c. How does our feedback inform and improve your services?

4. List any awards/recognition your firm has received in the last 5 years.

5. What is your customer retention rate?

6. Describe your phone and email response times.

D. Travel Services

1. What are your regular business hours?

   During this time:

   a. Who handles the calls, your employees or an outsourced firm?

   b. Where are they located?

2. After hours:

   a. Who handles after-hours calls, your employees or an outsourced firm?

   b. Where are they located?

3. How are unused airline tickets managed? What steps does the TMC take to help the client use the tickets?

4. How do your tools and services support risk management/duty of care?

5. Describe how your technology assists with travel policy enforcement.

6. Describe how you establish, maintain, and remove travel profiles. Who has access to this information, and how is it accessed and secured?

7. How do you provide continuity of services in the event of a catastrophe or outage?

8. Do you provide group travel services? Describe these capabilities.

9. Do you provide leisure travel services? Describe these capabilities.

10. Do you provide meeting and event services? Describe these capabilities.

E. Mobile Services

1. Can your travel tools be accessed and used by travelers using mobile devices? If so, can new reservations be created on these devices?

2. Can itineraries be reviewed in the mobile app?

F. Personnel Experience and Training

1. What are the average years of travel industry experience and average years of tenure at this firm for your staff?

2. What is the average overall years of travel industry experience of your account managers and their average years of tenure at your firm? Please include any related education, training, or work experience, such as experience as a travel buyer or manager.

3. Where would our account manager be located?

4. What are the average years of travel industry experience and average years of tenure for the travel advisors at this firm?

5. What experience and training do your travel advisors have?

6. How do you conduct travel advisor training on a new client's travel program?

G. Account Management

1. Describe your organization's account management hierarchy.

2. Describe the service configuration you propose for our account.

3. What vendor programs do you offer for airfare, hotels, and rental cars?

4. Will our account manager negotiate with vendors on our behalf? Describe this process.

5. How often you do conduct account reviews and how will these contribute to the improvement of our program? Provide an example review.

6. How will our account manager show the savings and ROI of our travel program? Provide an example.

H. System Administration and Reporting

1. What technology does the TMC provide? Please provide a technology guide or overview.

2. How many websites/portals will the travel manager access to manage the travel program? List the sites and explain their basic functionalities.

3. How many websites/portals will the traveler/arranger access to manage an individual's travel? List the sites and explain their basic functionalities.

4. What is the standard frequency by which you provide reports to the travel manager?

5. Who has access to create and view reports, and in what file formats are they available?

6. Can the travel manager set up a schedule for report distribution? Are there additional user licenses required for this?

7. Do your reports provide information including benchmarking, analytics, and other industry comparisons? Please provide examples of your standard reports.

8. Are report data available in real time? If not, what is the time frame for data updates?

9. Describe the process of configuring your TMC's software to reflect our specific travel policy.

I. Reliability, Support, Upgrades, & Security

1. What support resources are available for (a) individual users and (b) corporate travel managers? What training is offered to both groups?

2. How do you communicate service outages and resolutions to customers?

3. Describe how our payment information and traveler data are secured and protected.

J. Implementation, Account Management, and Adoption

1. What is the implementation process? Provide a sample implementation plan including an implementation schedule.

2. Identify the individual(s) who will provide our company with implementation and ongoing product support. If they are not the same person, how is the handoff managed?

3. What are the key tasks and time commitments of the TMC during and after implementation? Describe account management structure, roles, and deliverables.

4. What training and training resources are provided by the TMC? Are there costs associated with such training?

5. Describe your online adoption practices and methods for increasing adoption among travelers.

6. What is the process to migrate or convert data from our current system to your system?

K. Value-added Services

1. Describe any value-added services that would be beneficial to our organization.

L. Pricing

1. Please provide a pricing matrix. When quoting a booking fee, please include all possible fees and expenses.

2. Please list any additional costs not included in the response to question L.1, above, that may be necessary during the first year or subsequent years.