Sample RFP Document

# Schedule 1: Company Information

1. Contact details:

|  |  |
| --- | --- |
| Company Name |  |
| ABN |  |
| ACN (if applicable) |  |
| Address |  |
| Phone number |  |
| Fax number |  |
| Contact name |  |
| Contact title |  |
| Contact phone number |  |
| Contact email address |  |

1. Describe your company history and experience (including company history, employee numbers, office location etc.)
2. What is your primary focus when delivering travel management services to your clients?
3. Please provide two references from clients similar to [COMPANY NAME]

# Schedule 2: Scope of Services

## Booking Services

### Via a Consultant

1. Describe your offline booking process, including location and hours of operation.
2. Describe the after-hours service you would make available to [COMPANY NAME], including location and hours of operation.
3. Do you have an Executive Travel Service?
4. How do you manage periods of peak demand?
5. Will [COMPANY NAME] consulting team operate under any incentive scheme? If yes, please describe.

### Via an Online Booking Tool

1. What online booking tool would you recommend? Why?
2. [COMPANY NAME] is looking to move some of our international travel online, how is your booking tool able to facilitate this for us?
3. Are low cost carrier flights bookable on the proposed online booking tool?
4. Are you able to provide [COMPANY NAME] with a mobile application? What functionality does this have?
5. How can you guarantee the privacy of [COMPANY NAME]’s traveller data?
6. How would you increase online adoption (Note: our current adoption rate is xx%)?
7. Do you provide an online support team?

### General

1. How do you assure that we have access to best in market fares?
2. [COMPANY NAME] requires 3 quotes to be provided for all international travel, how can you facilitate this for us?
3. How will you assist [COMPANY NAME] to minimise the loss of tickets in credit?
4. How are traveller profiles managed?
5. How can you help us with our group travel requirements?
6. Describe how you would assist our travellers with Visa requests?
7. Are you able to provide SMS notifications to our travellers?
8. Please describe your process for managing and handling issues?
9. What KPIs would you recommend to ensure the provision of optimal travel management services to [COMPANY NAME]?
10. Please provide your standard service level agreement?

## Reporting

[COMPANY NAME] is looking for full visibility across all operations. Ideally we would like to be able to access and run our own reporting however if this is not possible, the selected travel provider must be able to provide detailed monthly, quarterly and annual reports. Reports required are listed below however additional may be required on an ad-hoc basis:

* Executive Summary (which can be drilled down by provider and company hierarchy)
* Exception code and reason code reporting on all divisions
* Business class exceptions
* Savings lost (including Best Fare of Day)
* Carbon emissions
* SLA Reporting
* Reporting on traveller booking behaviour
1. Briefly describe how you will make reporting available to [COMPANY NAME].
2. Is it available online?
3. Are the reports configurable?
4. Do you provide pre-trip reporting?
5. [COMPANY NAME] currently use [EXPENSE MANAGEMENT SYSTEM]. Please detail your ability to integrate with this.

## Account Management

1. [COMPANY NAME] is looking to work with an Account Manager, who will be responsible for being our key point of contact for all communication with your organisation and assisting us with improving our travel program. Describe how you would fulfil this requirement.
2. Provide examples of any cost down initiatives that you think could be enacted for immediate benefit to [COMPANY NAME].

## Implementation

1. How would you propose to manage the implementation of the [COMPANY NAME] Account, please include an implementation plan in your response?
2. What requirements would you have of [COMPANY NAME] during the transition process?
3. What support would you provide to [COMPANY NAME] during the transition process?
4. Define how you will ensure our travellers/ arrangers will be adequately trained in new systems, processes, technologies and procedures relating during the transition period and on an ongoing basis?
5. How do you recommend profile data is transferred from our current TMC?
6. Please provide a transition out plan.

## Emergency Management/ Disaster Recovery

1. How can you assist [COMPANY NAME] travellers in the event of an emergency?
2. Describe your contingency plan in the event of a serious disruption to operations e.g. loss of access to premises.

## Other

1. How are you dedicated to a policy of continuous improvement?
2. What is your self service capability?
3. What developments do you anticipate over the next 24-36 months, which will enhance [COMPANY NAME]’s travel program?

# Schedule 3: Pricing

1. [COMPANY NAME] is looking to operate under a transaction fee model. Please outline all applicable fees in AUD. All fees must exclude GST.
2. Outline any other financial benefits that you will make available to [COMPANY NAME]?
3. Is there an alternative pricing model you would like to propose?

# Schedule 4: Commercial and Contractual Details

## Insurance

1. Please provide the following details:

|  |
| --- |
| Professional Indemnity Insurance |
| Insured by |  |
| Policy number |  |
| Expiry date |  |
| Insurance amount |  |
| Public Liability Insurance |
| Insured by |  |
| Policy number |  |
| Expiry date |  |
| Insurance amount |  |

|  |
| --- |
| Workers Compensation Insurance |
| Insured by |  |
| Policy number |  |
| Expiry date |  |
| Insurance amount |  |

## Contract

1. Please outline any proposed deviations or additions to the standard agreement provided by [COMPANY NAME] in [NAME OF ATTACHMENT/ APPENDIX/ SECTION].

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