

RFP Toolkit

Learn about the Request For Proposal (RFP) and gain access to helpful questions to ask your suppliers.



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What to consider when reviewing your managed travel solution.

Are you reviewing your managed travel solution? A smooth RFP is the first step to a successful solution.

We know that improving employee retention, streamlining operational efficiencies, and maintaining client relationships are some of your key priorities right now. So, to make your job easier, we've put together a toolkit with all the key points to consider, including the details suppliers need about your company, the questions they need to answer, and a suggested timeline.



Here's what you can expect from this toolkit:

Introduction to the RFP process

What your company should provide to suppliers, including your company overview, objectives, and details about your current travel program.

4

Key priorities and deadlines

What suppliers can expect during the process, and an outline of milestones along the way.

5

Questions to ask the supplier

The meat of the toolkit – here's what your supplier should answer.

6

Next steps

You have the information, now you wait for the responses to roll in.

10

Introduction to the RFP process

You've identified the need for a new managed travel solution – now what? The first step is to outline your current travel program details.

Company overview

Adding the following information will help both you and the managed travel solution determine if you're a good fit. Add a description of your company, industry and total travel volume.

Objectives

Identify your top three priorities when working with a new managed travel solution.

Describe your current travel program

Be sure to provide the best details possible to the supplier.

- 1 We have travelers based in several locations:**
List every location here.
- 2 Our current travel program consists of:**
Unmanaged, dedicated agents, traveling mostly for team-based offsites, etc.
- 3 Our travelers mainly consist of:**
Road warriors, executives, recruits, guests, etc.
- 4 The number of travelers we support:**
If you don't know an estimate, you can indicate your company's annual total travel volume cost.
- 5 We use the following methods to pay for travel:**
Corporate card, personal credit card, invoice, etc.
- 6 Our managed travel solution should be integrated with these systems:**
Some examples include, HR database, expense tools, and duty of care provider.
- 7 Our travel data for the last 12 months:**
Include data such as percent of bookings made at least seven days before travel, percent of trips booked in policy, and hotel, flight, car rental, and rail spend.



Identify your top priorities

Carefully review the responses from suppliers and narrow down your options based on the importance of each priority.



Determine a schedule for the entire process

Following the bid evaluation process, you'll determine the short list of finalists. Finalists will present their proposal to your key stakeholders.



Questions and clarification

During the RFP response period, all questions from the managed travel solution must be submitted in writing to stakeholder(s) at your company. Identify these stakeholders and a deadline for the managed travel solution. Responses should be provided in writing to all suppliers.



Response submission

Determine the deadline, format, and key stakeholders for the managed travel solution to submit responses.



Effective date of RFP response

Most responses should be valid for 180 days from the due date of the RFP.

Your timeline to evaluate the proposal should be scheduled by all stakeholders, jive with your overall business operation, and provide enough time for a complete evaluation.

Milestone Timeline	Date
RFP issue date	
Deadline for managed travel solution questions	
Deadline to respond to managed travel solution questions	
RFP due date	
Finalist presentations	
Request for contract templates (legal pre-reviews)	
Final decision	

Questions to ask the supplier

Below are questions your suppliers should answer and submit to your stakeholders by the deadline you set.



Executive summary

- 1 Highlight your unique strengths and competitive advantages.
- 2 Explain why you're best qualified to meet our company's program needs.



General agency information

- 1 How is your company investing in innovation to keep pace with industry change?
- 2 What do you anticipate are the most significant industry trends in the near future?
- 3 Provide an overview of your global network and identify your wholly owned offices.



Online booking and fulfillment capabilities

- 1 Does your company offer a proprietary online booking tool (OBT) for our regions, or do you use a third party OBT?
- 2 If you offer multiple online booking tools, which tool do you recommend and why?
- 3 What is the average adoption rate for your customers? How do you define your online adoption rate?
- 4 Can travelers book, cancel, and exchange their tickets through your mobile app?
- 5 Do you offer technical support for travelers?
- 6 Do our travelers have to contact separate teams to get travel and OBT support?
- 7 Can guests and non-employees use your OBT?
- 8 What tools do you have available for travel arrangers and executive assistants?
- 9 What is the process for traveler profile maintenance? Does your platform require synchronization with additional sources, such as a global distribution system (GDS)?



Customer and traveler service

- 1 Please provide an overview of your proposed service configuration, including team size, hours of operation, languages supported, etc.
- 2 What platforms do your agents book in? Will we have access to the platform used by your agents? Can travelers modify itineraries initiated by a travel agent?
- 3 Describe your 24-hour/after-hours service.
- 4 Describe visa and passport assistance.
- 5 Describe your company's executive travel services.
- 6 How are en route travelers notified of security advisories and travel alerts?



Implementation

- 1 Summarize the implementation strategy you propose for us. Provide a proposed timeline with key milestones. Define the roles and responsibilities of the individuals involved.
- 2 What will be the most critical factors to implementation success?
- 3 Describe how you will introduce travelers and travel arrangers to your program.



Account management

- 1 What are the key responsibilities of your account manager?
- 2 What is included in your business reviews?
- 3 How will you manage our global program?
- 4 How will you inform us of breaking industry news and security advisories promptly?
- 5 Do you have risk management resources?



Program achievements

- 1 How will you help us advance our online booking rate?
- 2 How do you promote compliance to our policy? What policy and pre-approval tools do you have? Do we have online access to make changes to our policies?
- 3 How do you prevent program leakage? How do you increase our hotel attach?
- 4 How do you improve traveler satisfaction?
- 5 How will you improve our program and data visibility?
- 6 How will you improve efficiencies for our employees?



Savings and cost avoidance

- 1 Describe how you can deliver savings to our company.
- 2 How will you support our preferred airline, car rental, and hotel contracts?
- 3 Describe your supply choices, including GDS, non-GDS, and low-cost carriers.
- 4 Describe your preferred rate hotel program, airline program, and car rental program.
- 5 How do you manage unused ticket inventories?
- 6 How do you secure the lowest fares for our travelers?



Program quality assurance

- 1 How do you measure and report on customer satisfaction?
- 2 What is the process for resolving customer service issues?
- 3 How will your company help meet or exceed service standards?
- 4 How do you monitor and evaluate travel counselor performance?
- 5 Describe your training and retention programs.
- 6 Describe your disaster recovery/business continuity strategies.



Technology and integrations

- 1 Describe your technology development strategy.
- 2 How is your company prepared to safeguard our data privacy interests?
- 3 Can you support an ongoing data feed for profile maintenance?
- 4 Do we have online access to our profile data set?
- 5 What is the time needed to synchronize profile updates?
- 6 Can you interface with independent duty of care providers, i.e. International SOS?
- 7 How will you integrate with our third-party partners, X, Y, Z?



Data and reporting

- 1 Provide a brief overview of your online reporting tool.
- 2 Do you provide pre-trip, in-progress, and post trip data?
- 3 Are online, mobile, and offline transactions consolidated in a single data source?
- 4 How often is your reporting data updated?
- 5 Describe your quality manage mechanisms to assure data integrity.



Billing/payment

- 1 Describe your payment options. Can you support our existing payment method? If not, what do you recommend is best practice?
- 2 Describe your custom data fields available for departments and cost centers.
- 3 Describe your company's expense integration options that are relevant to us.
- 4 Explain your process for voids, cancellations, exchanges, and refunds.



Pricing and financial offer

- 1 Provide a brief overview of your pricing model, including transaction fees.
- 2 Clearly state all one-time implementation fees, account management fees and other expenses additional to your company's transaction fees. All costs must be included in your bid response, and no additional start-up, travel, consulting, implementation, technology or other additional fees exist to be added later.
- 3 Please define an online transaction both with and without agent assistance and any associated fees.



References

- 1 Please provide three references of similarly sized or configured accounts.



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Propel your people with American Express Global Business Travel (Amex GBT)

Now that you understand the information that's needed from your company, and the questions suppliers should answer, you're well on your way to identifying the right managed travel solution for your business: one that can propel your people with seamless business travel.



**Ready to make your RFP
process more efficient? Want
to know how Amex GBT can
be a fit for your company?**

Let's talk

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