Sample RFP Template  
Travel Management Services

**Note:** Copy and paste the information and RFP questions into your own branded template that you wish to include in your RFP. Replace the red text below with customized information about your organization and travel program.

**About [Your Company Name]**

Customize with information about your company that will be meaningful for the travel management companies you have invited to bid. This section could include:

* [Company Name] background information and corporate culture.

**Tip:** When using this RFP template, don’t forget to tailor the RFP to articulate your program goals and provide questions that speak to your specific needs and culture.

The more the TMC knows about your needs, the more they can customize their response.

* State your travel program objectives clearly.
* List pain points regarding your current program you wish to improve.
* Travel program profile (i.e., details of your current program including but not limited to the current configuration, account management structure, online booking tool, reporting, policy parameters, etc.).
* [Company Name] travel policy (include with RFP, if available)
* Evaluation criteria and scoring method (rank in order of priority)

**[Company Name] Travel Data**

The following information is provided to facilitate accurate pricing recommendations.

**Tool:** To help you gather the required information, download the [**Sample RFP Excel Pricing template**](https://travel.foxworldtravel.com/sample-rfp-pricing-template/), and complete the Travel Program Profile worksheet in Tab 1, and include it with your RFP. This will help TMC understand your needs and provide you with more accurate pricing.

* List total T&E for the previous fiscal year.
* List locations by country and traveler headcount by country.
* List projected volume and transaction for the fiscal year.
* List preferred air, hotel and car suppliers if applicable.
* Provide by country
  + Average ticket price fiscal year to date.
  + Management summary by country region.
  + Air, hotel, car spend.
  + Top 5 city pairs (domestic & international).
* List online booking tools and online adoption rate by country if available.
* Current expense reporting process
* Corporate credit cards
* Global program consolidation (if applicable)

**Tip:** If possible, allow TMCs at least one month to respond, and slate at least four to six weeks to evaluate responses. Also, allow enough time to negotiate with a shortlisted or winning bidder.

Be sure to allow enough time for implementation. Three months is a good guideline for implementation, but this may vary based on the size and scope of your program.

**RFP Selection Timeline**

00/00/00 RFP to prospective bidders

00/00/00 RFP clarification questions due from bidders

00/00/00 [Company Name]’s response to bidders’ questions

00/00/00 Proposals due to [Company Name]

00/00/00 Reference checks

00/00/00 Agency shortlist announced

00/00/00 Final presentations or meetings

00/00/00 Agency selection and announcement

00/00/00 Implementation process begins

00/00/00 Go-live (starting with new TMC)

**Contract Terms and Conditions**

[Company Name] intends to award a business travel agency contract worldwide for [Company Name] to one provider for an initial term of three years. Please provide financial proposals based on a three-year term for the following countries: [list countries in scope of travel RFP].

Specific contractual terms will be agreed upon during the selection process.

**RFP Confidentiality, Terms and Cost**

All information concerning [Company Name] travel volume and related data is proprietary and confidential. Bidders are required to respect the confidentiality of this information. Likewise, the travel management company’s responses to this Request for Proposal (RFP) will be treated in a confidential manner.

This RFP is not an offer to enter into an agreement with any party; rather, it is a request to receive proposals from bidders that have an interest in providing the services specified herein. [Company Name] reserves the right to reject any proposal, in whole or in part, and/or to enter into agreements to provide services with any party.

[Company Name] will not be responsible for any costs associated with the preparation of supplier proposals, their presentation, or the cost of [Company Name] site visits.

**Proposal preparation requirements**

Required documents, response criteria and submission instructions. Rules for submitting questions and feedback with the RFP team (who and how).

RFP Questions

1. **Executive Summary**
   1. Provide an executive summary describing how your company and solution are best suited to partner with [Company Name].
2. **About the TMC**
   1. Provide a brief overview of your company (years in business, areas of specialization, special recognition, etc.).
   2. Describe your company culture and values.
   3. Provide an overview of your company’s stability and growth over the last five years.
   4. What is your customer retention and renewal rate?
   5. How will you help our organization navigate the evolving health and safety considerations impacting travel?
   6. Describe how you manage global programs for comparable clients. Specifically address wholly owned, franchise, and affiliate relationships. (if applicable)
   7. Describe your approach to customer service and innovation?
   8. What differentiates your company from your competitors as it relates to our program objectives?
   9. Designate one individual from your organization who will serve as [Company Name]'s contact person for the duration of the RFP process.
3. **Account Management**
   1. Describe your account management structure? Who will be responsible for overseeing the management of our program ensuring we meet our program objectives? Please include their role and responsibilities.
   2. Describe the global account management reporting structure. How will the global account manager coordinate services throughout regions and countries? (if applicable)
   3. Do you provide consulting on corporate travel policy?
   4. Beyond account management personnel, what other resources will be engaged to optimize our program (e.g., supplier relations support)?
   5. How will you provide ongoing recommendations around cost savings and other potential changes to improve our travel program?
   6. How frequently will you provide reviews on our program objectives and performance?
   7. How will you inform us of industry news, security advisories and market updates in a timely manner?
4. **Supplier Programs and Cost Reduction** 
   1. Describe any airline agreements and/or programs your TMC offers.
   2. Describe your hotel program.
   3. Do you offer an electronic hotel RFP tool and a hotel rate auditing product?
   4. Describe any car rental agreements your agency offers.
   5. Will you support [Company Name]’s negotiated agreements and programs? Describe.
   6. Do you offer assistance to help us manage and/or negotiate our supplier contracts?
   7. Do you have any products to help us streamline the processes associated with hotel direct billing?
   8. What access do you provide to non-GDS content and web fares?
   9. Describe your process for securing the lowest rates.
   10. Describe your method of housing and tracking unused ticket credits, MCO’s and non-refundable tickets. Can unused credits be applied to online bookings without contacting the agency?
   11. Will you guarantee lowest fare, hotel and car expense within our company guidelines?
   12. Describe your price assurance and rate rechecking post ticketing.
5. **Data Management and Reporting** 
   1. Describe your data management reporting platform. How are reports generated in what media (i.e., email, online, etc.)?
   2. What are your capabilities for providing custom and ad hoc reporting?
   3. Do you offer a reporting tool that allows us to benchmark ourselves against other companies?
   4. Describe your traveler behavior reporting on travel policy compliance.
   5. Can you consolidate data from multiple sources and translate it into intuitive visualizations and actionable insights?
   6. Describe how data and Management Information quality and accuracy are ensured.
   7. Can your company provide credit card reconciliation? If so, describe briefly.
   8. Do you have a platform for proactively tracking travelers and monitoring risks? If yes, please describe the platform’s capabilities.
   9. Do you provide global reporting and consolidation of data from multiple TMCs?
6. **Traveler Support Services and Technology**
   1. Provide an overview of your customer service and support team.
   2. What are your standard business hours by country or region? How are calls managed after-hours?
   3. How many agents would comprise our team by country or region?
   4. Are all agents employed by your company or outsourced?
   5. What is the average experience of your agents?
   6. Describe your VIP services.
   7. How do you communicate schedule changes/flight delays to travelers?
   8. Describe your e-invoice/itinerary. Can the itinerary be synced with travelers’ calendars?
   9. Do you offer a mobile app? If yes, please describe.
   10. Do you have an online travel portal or app that employees could utilize for travel support (includes online booking tool, destination information, etc.)?
7. **On-Site Support (Applies only to accounts with an on-site configuration)**
   1. Can you support on-site agents at our location? If you do support on-site staffing, how do you support backup coverage?
   2. Will you provide GDS access to our on-site agents?
   3. What other technology do you offer our on-site agents to enhance productivity?
   4. How do you manage training for on-site agents?
   5. Do you have a support team contact for us for GDS, technology and booking assistance?
8. **International Travel Services**
   1. Do you staff an international rate desk? Describe any unique aspects of their service and include cost reduction statistics.
   2. Do you have access to reduced airfares for tickets issued outside of the U.S.? If yes, describe.
   3. Do you provide passport and visa assistance (for both on and offline bookings)? Are you able to obtain a discount for us?
   4. How do you assist in providing travelers with health and safety requirements? Specifically, around the pandemic travel restrictions and entry requirements in other countries.
9. **Quality Performance Initiatives & Customer Service**
   1. Describe the resources you invest in travel agent training.
   2. How does your company monitor and evaluate travel agent performance?
   3. How do you measure and report on traveler and travel manager feedback?
   4. Describe your process for resolving customer service issues.
   5. Are you willing to enter into a service level agreement based upon mutually acceptable criteria?
   6. Indicate your telephone service standards, i.e., average speed to answer.
   7. Do you measure NPS? What is your average NPS rating?
10. **Online Booking**
    1. Which online booking tool do you recommend? Describe your level of experience with online booking.
    2. Do you offer an online help desk?
    3. Is the online booking tool programming managed in-house or is it outsourced?
    4. Can reservations be canceled, changed and rebooked online?
    5. Do you provide online booking tool training to our travelers and arrangers? Describe the training available both at the time of implementation and post-implementation.
    6. Are non-refundable ticket credits displayed in your proposed online booking tool?
    7. Will travelers be able to book web fares via the online booking tool, and will the corresponding reservation data be included on your management reports?
    8. Are online bookings processed and/or fulfilled after hours? Are related tickets issued immediately, or the next business day?
    9. Will you program all of our corporate hotel discount programs into the tool?
    10. Provide examples of unique programming you support to reduce costs, increase policy compliance and/or streamline the booking process.
11. **Duty of Care (Traveler Security)**
    1. How do you keep clients apprised of travel issues and/or risks before and during a trip?
    2. What is your process for locating travelers in a disaster situation and communicating relevant information to [Company Name]’s travel manager?
    3. How will you help ensure our travelers are informed and educated around the health and safety requirements?
    4. Do you provide a global security platform that provides proactive traveler tracking, impact and event classification and destination monitoring?
    5. Can you create data feeds for International SOS, WorldAware, or other third-party international security programs? (If applicable)
    6. Describe how you can assist with the development of a risk management program.
    7. Describe your internal disaster recovery program.
12. **Group/Meeting/Event Planning Services (If applicable)** 
    1. Does your company offer group, meeting and event planning services?
    2. How do you handle hotel and other venue sourcing needs?
    3. What types of destination analysis can you offer?
    4. What a la carte services do you provide?
    5. Do you provide cost savings analysis?
    6. What registration/meetings management software does your company use? How will this software benefit our company?
13. **Group Air Booking Capabilities (if applicable)** 
    1. Describe your group booking process.
    2. What group discounts and block space offerings do you provide?
    3. How do you manage group and individual traveler parameters?
    4. What after-hours/emergency assistance do you provide for group travel?
    5. Describe any custom technology solutions you offer.
    6. What reporting do you offer?
14. **Implementation**
    1. Provide an overview of the implementation process.
    2. What is your procedure for compiling and updating company and traveler profiles?
    3. Can you accept the profiles in use by our current travel management company?
    4. Describe how you will orient and educate travelers and travel arrangers to your program.
15. **Additional Value-Added Services**
    1. Can you provide leisure services for our employees?
    2. List any value-added services or partnerships not previously described that will provide value to our program?
16. **References (if required at this stage in the RFP process)**

**Tool:** If you prefer to develop your own pricing template, we have included a **[Sample RFP Excel Pricing template](https://travel.foxworldtravel.com/sample-rfp-pricing-template/)** to help get you started.

* 1. Provide contact information (company, contact name, title, phone number and email address) for two-three clients of similar size and nature who have a similar program, whom we may contact.

1. **Pricing Proposal**
   1. Please attach your pricing proposal (Excel format) which outlines all costs associated with implementation of our program and ongoing service.
      1. Please be sure to clearly indicate if costs are one-time or ongoing, and the cost driver (e.g., per transaction, per year, etc.)
      2. Please identify separately all estimated implementation and/or start-up costs, if applicable.
      3. Include fees for any "optional" services offered by your company. It is important that we understand up-front all fees that may be charged associated with this program. [Company Name] will not pay charges that are not listed in this proposal and agreed upon in advance.