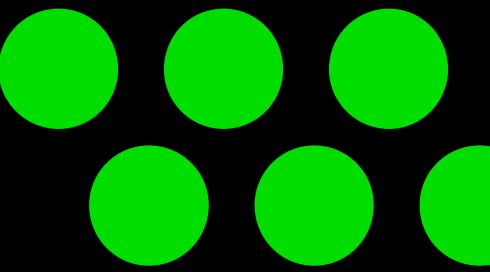


THE FCM RFP GUIDE:

Finding your perfect TMC partner





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Outline your current travel programme and booking methods

Provide a snapshot of your company and travel challenges

Dive into tech capabilities
and reporting functions

Clarify the service levels and available support

Clarify pricing models, hidden fees, and payment terms

Welcome to your step-by-step RFP guide!

Finding the right Travel Management Company (TMC) can feel a bit overwhelming, especially when travel is such a crucial part of your business operations. But don't worry – we're here to help make this process straightforward and even (dare we say it?) enjoyable!

At FCM, we've helped countless organisations through their request for proposal (RFP) journey, and we've poured all that experience into creating this practical manual.

We want to help you find a travel solution that fits like a glove – making life easier for your travellers, boosting efficiency for your travel managers, and keeping your finance team happy too.

We've kept things simple with an easy-to-follow scoring system. This system evaluates you based on your understanding of your current travel needs and requirements, determining how ready you are to initiate an RFP. After tallying up your points, you'll know exactly where you stand, with a key at the end of the guide that places you into one of three categories.

- The more detail you can provide, the higher your score
- Your total score will help guide your next steps

A helpful tip from our experience

The post-tender Q&A phase is your chance to really dig deep. Don't be shy about asking for clarification on things like service levels, tech capabilities, or fee structures. The more you know, the more confident you'll feel in your final decision.

How to make the most of this guide

1

Take it step by step:

Read through each section carefully and choose the responses that best match your current state of travel affairs and specific requirements.

2

Be honest:

The more candid you are about your needs and challenges, the better equipped you'll be for the RFP process.

3

Keep track:

Your scores and pain points will help shape productive conversations about your future travel programme.



FACT

Companies often see faster proposal responses from TMCs when they provide detailed descriptions of existing booking methods and pain points in the first stage of the RFP.

Outline your current travel programme and booking methods

What to do: Start your RFP by defining how your company currently handles travel. TMCs need to understand how your travel is managed today – what's working well, what's falling short, and how their services can slot into your existing systems.

Here's what to include:

- Booking methods:** Are you using an online booking tool (OBT) like Concur or Cytric, or is everything handled manually? Explain whether your booking is done through a centralised system or team, or if employees manage their own travel with expense reports afterwards.
- System integration:** Does your booking system integrate with HR, finance, or your current expense management systems? Are you looking for a TMC to enhance this integration and streamline these areas more efficiently?
- Current pain points:** What's not working with your current processes? Maybe your approvals take too long, or you're bogged down with manual reporting. Highlight specific weak points so the TMC immediately knows where they need to improve things.

TOP TIP

When sharing pain points, don't hold back. Offer specific examples, especially on recurring issues. The TMC needs clear details to understand where they can add value and improve efficiency in your processes.

Scorecard: Outline your current travel programme

/9

Understanding your current setup (select one):

Things aren't working great, but it's hard to pin down exactly why	(0)
We know our booking tool isn't meeting our needs	(2)
We've identified clear issues with our booking processes, support, and expense management	(3)

List two pain points with your current travel setup:

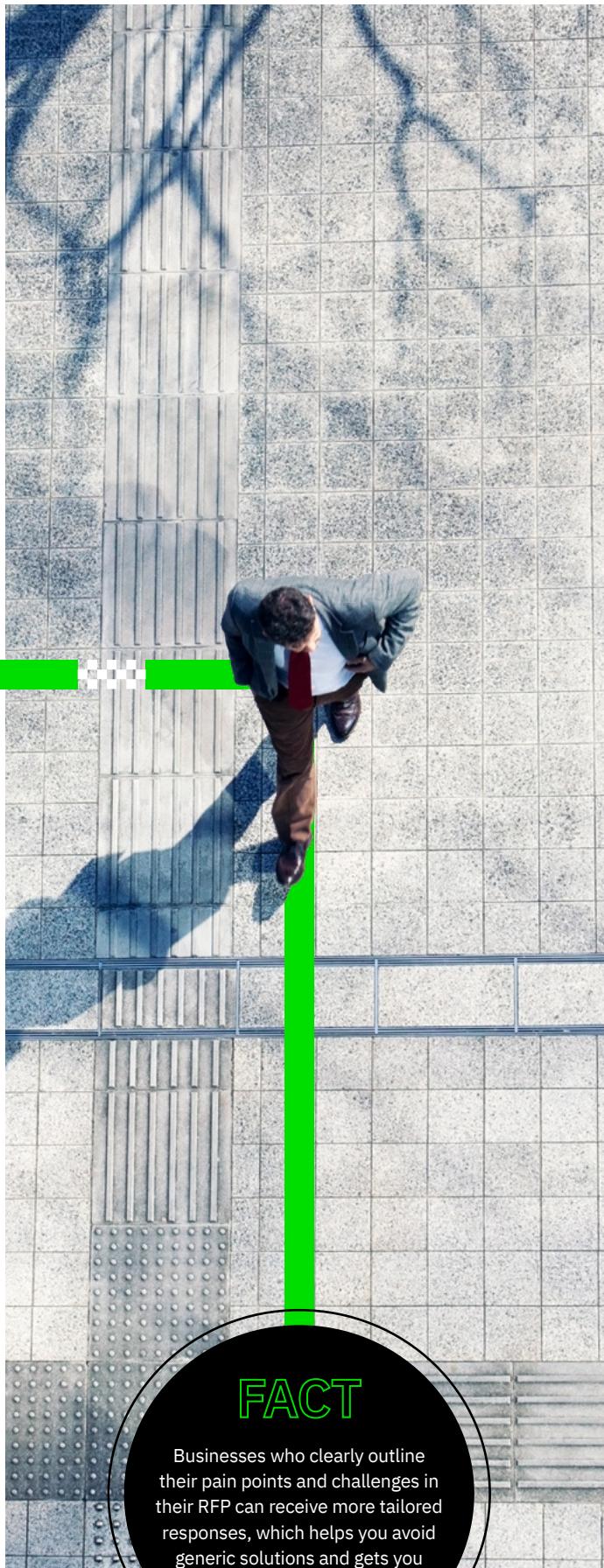
Pain point 1:	(1)
Pain point 2:	(1)

Booking tool - Current booking tool(s) - Are you familiar with what it is? (select one):

Not sure	(0)
Yes, I know what it is	(2)
Yes, I know what it is and the online vs offline split	(3)

Are you aware of your integration needs? Please elaborate:

(1)



Provide a snapshot of your company and travel challenges

What to do: After covering your current setup, focus on giving the TMC an overview of your company details, goals, and specific travel challenges. Here's what to outline:

- **Company profile:** How large is your company? Which sector are you in? Where do your employees travel to regularly, and how much travel do you handle annually? TMCs must understand your scope so they can offer appropriate solutions. Be clear about whether most of your travel is domestic, international, or multi-city.
- **Pain points:** What's not working? Do you have too many manual steps in the booking process? Is real-time reporting almost non-existent? Or maybe your approval process still moves at a snail's pace.
- **VIP needs:** If your company has frequent executive-level travel or VIPs requiring special services, don't forget to clarify this. Do your VIPs expect concierge services, specific seat preferences, or priority check-ins?

Scorecard: Clarify your company profile and challenges /11

Company profile detail level (select one):

I'm unsure of the details and need to do some more research	(0)
I've got basic information, but it's missing some key details	(2)
I've got a complete profile with all travel requirements feeding from a HR feed	(3)

Basic company details (select one):

I know my industry, but I'm unaware of specific travel and company details	(0)
I know my industry and my company size	(2)
I know my industry, my company size, and annual travel spend	(3)
I know my industry, my company size, annual travel spend, and the domestic vs international travel split	(4)

Let's explore some challenges with your current travel programme (select one):

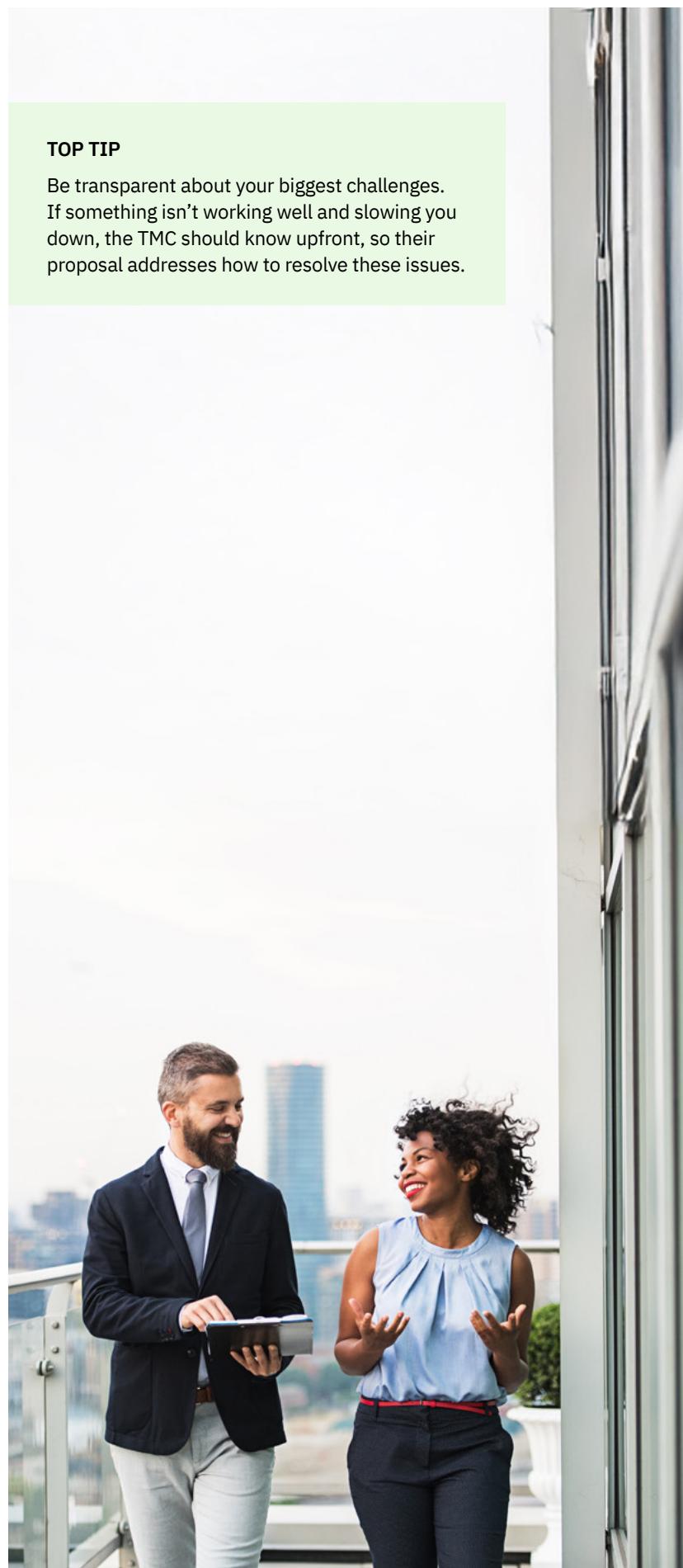
I'm unsure of specific challenges	(0)
I don't have any challenges	(1)
I travel to remote areas and face supply issues	(1)
The nature of our business requires frequent last-minute bookings and changes	(1)
Other:	
	(1)

Future improvements needed (select one):

I'm unsure if improvements are needed; I need to gather more information to assess our needs	(0)
No improvements needed; we'll be issuing an RFP due to governance	(3)
I can think of one or more improvements	(3)

TOP TIP

Be transparent about your biggest challenges. If something isn't working well and slowing you down, the TMC should know upfront, so their proposal addresses how to resolve these issues.



Dive into tech capabilities and reporting functions

What to do: Now that you've shared your challenges, it's time to get specific about technology. You want to ask how the TMC's tools can cover your current needs and if they can integrate seamlessly into your systems.

Here's what to cover:

- OBT & system integrations:** Do they have tech tools that integrate with your expense management, HR, or payroll systems? Ideally, you want minimal disruption when introducing a new system, so clarify how smoothly their platform will work with what you already use.
- Reporting & KPI tracking:** Ask about their real-time reporting capabilities and ability to track key performance indicators related to budget spending, policy compliance and duty of care. You should ensure they can offer transparent data that's easy to understand and export.
- Mobile & off-hours capabilities:** Does their platform work on mobile? For instance, can your team approve trips or gather reports on the go? Ensure their tools are flexible and mobile-friendly, especially for senior management who need information fast.

FACT

Understanding a TMC's technology and data capabilities upfront will prevent setup delays and ensure your internal teams and systems won't struggle to adapt.

Scorecard: Tech capabilities and reporting

/13

Technology integration requirements (select one):

I'm unsure of integration needs	(0)
I can identify basic integration requirements	(1)
I have a clear understanding of all integration and reporting needs and can elaborate below	(3)

What kind of tech integration are you looking for? (e.g., HR, Finance, Payroll) (select one):

I can't identify with any of these	(0)
I can identify with one or more of these	(2)
I can identify with one or more of these and, in addition, we would also need:	(4)

Detail your requirements (select one option for each):

Real-time reporting – essential for your team?
Not sure (0) Yes (1) No (1)

KPI tracking: Budget, compliance, and duty of care?
Not sure (0) Yes (1) No (1)

Easy-to-use dashboards with export options?
Not sure (0) Yes (1) No (1)

Specify mobile needs:

Do managers need mobile approval tools?
Not sure (0) Yes (1) No (1)

Do travel bookers need mobile access to real-time trip updates?
Not sure (0) Yes (1) No (1)

Do travellers have mobile requirements?
Not sure (0) Yes (1) No (1)

TOP TIP

When considering data and reporting, don't just think about today – consider what will be important as you grow. Ask if their platform will scale easily as your business scales, and whether its reporting functions are evolving to meet the needs of more complex profiles.

Clarify the service levels and available support

What to do: Let's talk about service levels. It's one thing for a TMC's tech to be amazing, but what happens when there's an urgent request or a critical VIP service requirement? Here's what to confirm:

- **24/7 support capabilities:** Does the TMC provide round-the-clock support? What are their average response times to last-minute or emergency booking requests? Will you have one point of contact to deal with urgent issues?
- **Dedicated travel and account management:** You'll need a dedicated account manager to manage and continually optimise your travel programme, plus a dedicated travel manager for all booking requirements.
- **VIP services:** For senior executives or VIPs, will the TMC offer concierge-level services such as priority bookings, fast-tracked approvals, or first-class trip management? Specify these needs to ensure TMCs respond correctly.
- **Stipulated turnaround times and travel policy compliance:** Clearly define turnaround times for travel-related requests and ensure the TMC adheres strictly to your travel policy. These elements are critical to include in a Service Level Agreement (SLA) to maintain smooth and compliant operations.

FACT

Many businesses find that clarifying the support structure for high-pressure situations upfront helps avoid escalating crises later, ensuring smooth problem-solving for both employees and the TMC.



Scorecard: Confirming service levels and support /7

Support requirements (select one):

Uncertain about the required level of support	(0)
Basic support needed	(1)
Comprehensive 24/7 support with dedicated management	(1)

After-hours support (select one):

I'm uncertain about the after-hours support requirements	(0)
I require after-hours support that is in-region	(1)
After-hours support is necessary, but remote assistance is acceptable as long as we are supported.	(1)

Management structure (select one):

I'm not sure	(0)
In-house dedicated travel management team required	(1)
Off-site dedicated travel management team required	(1)

What level of VIP support do you require, if any? (select one):

I'm not sure	(0)
No VIP support needed	(1)
Infrequent VIP support needed	(1)
Extensive VIP support required	(1)

Travel Policy Support Requirements (select one):

I'm unsure if we need assistance with adjusting our current travel policy	(0)
Our current travel policy is good to go as is	(1)
I know there is room for improvement, I'm just not sure which aspects need adjusting	(1)
I am aware of the areas where our travel policy needs adjustment and, with the guidance of a TMC, would like to address them. Below are the key challenges or gaps I've identified that should be included in the SLA:	(3)

TOP TIP

It's essential to clarify who your point of contact is for regular queries and who steps in during after-hours emergencies. Ensure the TMC's support structure aligns with your company's pace, regardless of time or day.

Clarify pricing models, hidden fees, and payment terms



What to do: It's time to tackle pricing and payment structures. You need to ask about fees, including whether they're transactional or if there's a management fee structure involved. Don't forget to ask about additional costs that may arise for VIP services, emergency bookings, or extra reporting.

Address these key points:

- **Fee structure:** Are charges based on per-transaction fees, or is there a flat management fee that covers all services? This details how you'll pay for the TMC services and any variations depending on the volume of travel.
- **Hidden costs:** Ask about extra fees for last-minute flights, VIP management, emergency changes, etc. These costs add up over time, so it's essential to be aware of them upfront.
- **Payment preferences:** Share your preferred billing cycle (monthly or quarterly) and confirm the payment structure to avoid any unexpected bills later on. Collect documentation on contracts, invoice schedules, and reconciliation terms.

FACT

Many TMC contracts have additional fees tied to emergency or VIP bookings, often included in the fine print – confirming all possible charges before signing is smart business.

Scorecard: Confirm pricing and payment terms /5

Fee structure clarity (select one):

Unsure of fee preferences	(0)
Basic understanding of fee preferences	(1)
Clear fee structure requirements defined	(3)

Additional fees for VIP services? (select yes or no):

Not sure (0) Yes (1) No (1)

Preferred payment structure (select one):

Not sure	(0)
Monthly payments	(1)
Quarterly payments	(1)
Reconciliation terms confirmed with finance	(1)

TOP TIP

Always dig into the details of extra services – even if you don't plan to use VIP services often, costs might be embedded in specific situations. Clarifying these now will help you sidestep surprises down the road.



What your score tells you

Total score: /45

If you scored 35-45 points

You're ready to roll! You've got a brilliant grasp of your travel programme, and you're all set to start those RFP conversations. You know what's working, what isn't, and what you need - perfect for having productive discussions about your future travel programme.

If you scored 25-34 points

Almost there! You've got a good foundation, but there might be a few areas where more clarity would help. No worries – that's completely normal! A chat with our team could help you firm up those details and get you RFP-ready.

If you scored 0-24 points

Let's take a step back. It sounds like you might benefit from a deeper dive into your current setup before jumping into the RFP process. This isn't a bad thing – in fact, it's valuable information! We'd love to have a discovery chat to help you build a clearer picture of your needs and show you how other organisations have successfully navigated this journey.

Ready for your next move?

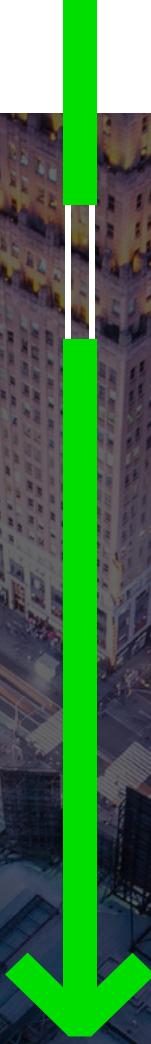
Whether you're scoring high or just getting started, we'd love to chat about your travel programme.

The FCM team can help you:

- Explore solutions to your specific challenges
- Share insights from similar organisations
- Map out your best next steps

TOP TIP

Upon completing the form, save a copy to your computer for sharing with the FCM Team!



Let's chat about your
travel programme

Get in touch