



Rewriting the travel RFP process

Moving from request for
proposal to request for partnership

Rewriting the RFP process

The Request for Proposal (RFP) process. Whether you're a procurement professional, travel manager, board member, supplier or one of the many, many stakeholders involved in the process, there's no escaping the impact of an RFP.

And whilst there is so much information out there about how to conduct one—from quick tips to templates—the RFP process remains a hot topic with many of us still struggling to get it right.

So why are we re-opening this debate now?

The RFP process is changing. My teams and I are seeing increasing numbers of blind bids being submitted across all regions. This isn't unique to FCM Travel, with other industry colleagues reporting similar trends. The result? An increase in the number of 'no-bid' responses and frustration from all parties unable to get the outcomes they desire.

This doesn't benefit anyone. So, we decided to investigate what rewriting those rules would look like. How can we take the best from the most successful sourcing exercises and reimagine a process that has "always been done this way"?

Secondly, there is more travel management company (TMC) differentiation in the marketplace than ever before. From capabilities to culture, technology to sustainability, the differences in approach are striking. We have new entrants, new technology providers and disruptors—both in the supply chain and from external influences.

Lastly, during our research for this piece, it was this word 'partner' that repeated again and again. Yet, the overwhelming view was that the traditional RFP process seemed lacking in the ability to truly identify a partner, not just a supplier.

With all this in mind, are we asking the right questions? Is the traditional RFP process still fit for purpose?

At FCM, we take an alternative approach to travel management. We're constantly working to discover new and innovative ways to tackle industry issues, empowering our clients and colleagues along the way.

The RFP process is no different.

With independent input and perspectives provided by social and intellectual capital creators, temoji, this latest edition to our Th!nk series explores the RFP process and delves deep into how we can move the dial on TMC sourcing, empowering you to find not just a supplier but a true partner.

Throughout this document we discuss how you can rewrite the rules of the RFP process and how it's beneficial. Collaboration and empowerment are at the heart of FCM, and we are bringing this to the RFP. For us, a truly collaborative approach is what elevates your travel program regardless of size or spend. So here we put forward our case to reimagine what is possible and move from Request for Proposal to Request for Partnership, giving you the tools and insights you need to make the leap.

Here's to less proposals and more partnerships!



LINDSAY STRAUB
GLOBAL HEAD OF SALES
FCM TRAVEL

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Concept:

From proposal to partnership

A recent BTN poll of 152 corporate travel and procurement managers found that 43% had undertaken an RFP process in the past three years. This suggests that there is RFP activity either taking place or being planned on a consistent basis. But is the traditional RFP process fit for purpose? And will it yield the results we are looking for?

Before we begin to explore how companies might move from RFPproposal and RFPpartnership, we need to understand what partnership means in the context of your business travel program.

Bertrand Sallet, FCM's Managing Director - Asia, defines partnership as "a collaboration between us and the customer, a mutual engagement towards the success of the program."

If travel program managers are searching for collaboration and partnership, it could be argued that the current Request for Proposal format isn't broad enough in its scope to deliver suppliers who fit those requirements.

We acknowledge this may not be of concern to everyone. Travel programs are unique to their organisation, ranging from tactical to strategic, reactive to proactive—and everything in between.

However, for those aiming for a strategic, collaborative relationship with their TMC, then an RFPpartnership approach could be the best solution long term.

The value in a collaborative, long-term partnership runs far deeper than a successful travel program. In their recent publication, "Why Procurement Partnerships Fail", Boston Consulting Group stated: "Successful procurement partnerships can deliver cost savings of 3 to 10% or more of in-scope spending, due to increased purchasing power, economies of scale, shared best practices, supply chain synergies, and the ability to standardise components."

Therefore, searching for a partner, rather than just a supplier, can directly impact the bottom line. In an economic environment where cost is still a key component in any procurement process, keeping in mind the direct benefit of sourcing a long-term partner needs to be highlighted.

All processes have areas of weakness, but our experts agree that the below are the most common pitfalls they come across during the RFP process.



Peer into your peers' RFPs

Here are the top qualities buyers want from their TMC, sourced from temoji.



Where RFPs fall short, according to experts:

Unclear objectives:

“An important element is clarity on what is your starting point and context. What’s even more important is the end destination—your long-term goals and how you define success. In many cases, there is no consensus on this.”

PASCAL JUNGFER, FOUNDING PARTNER
AND CEO - AREKA CONSULTING

No cultural assessment:

“Another pitfall is when you haven’t looked at culture closely. You find something out at the end of the process that maybe you should have found out at the beginning of the process.”

LORA ELLIS, CONSULTANT - FESTIVE ROAD

Short term thinking:



It’s really important to be thinking beyond where the travel program is right now. How do these questions support now, but also where do they want to be in a year, two years?”

LAURA NELSON, DIRECTOR OF PROPOSAL
MANAGEMENT - FCM TRAVEL

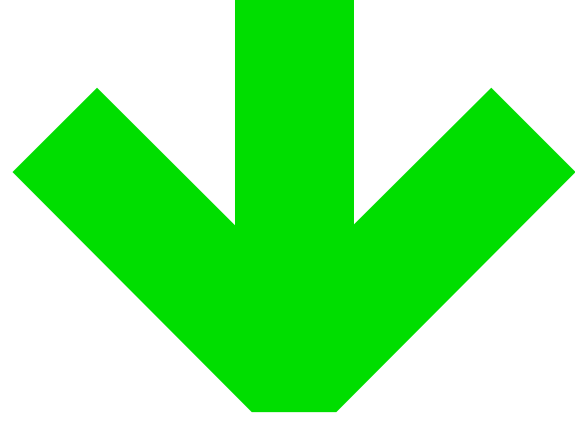
Lack of stakeholder engagement:



“It can take months to get to the finish line for an RFP. But without proper stakeholder buy in, when you get there, there’s someone at an executive level who has a different view and everything just falls apart.”

MICHAEL HOOK, DIRECTOR OF SALES,
AMERICAS - FCM TRAVEL

No-one wants their procurement process to fail. But how do you manage to avoid these common pitfalls when the existing frameworks are no longer delivering for you?



Comparison:

RFP Proposal vs. RFP Partnership

Let's start by looking at the two concepts side by side. This clarity will help us understand the basic differences between the two approaches before we dive into the methodology and benefits.

The matrix below illustrates the fundamental differences between the RFP Proposal and RFP Partnership approaches to TMC sourcing.

	RFP PROPOSAL	RFP PARTNERSHIP
PURPOSE	What I need: - Minimal focus on goals - Transactional in nature	What I hope to achieve: - Focus on wider company goals - Strategic in nature
PRE-WORK	Minimal: - Creation of questionnaire - Research into supplier	Extensive: - Comprehensive, aims, values created - Program strategy developed - RFP avoidance undertaken
PROCESS	Q&A: - Excel spreadsheet sent out - Intensive review period - Little room for creativity - One-way communication	Collaborative solutions: - Face-to-face meetings - Focused questionnaire - Solution-focused - Two-way relationship
INFORMATION	General: - Broad responses - Information-led	Specific: - Answers tailored to pain points - Solution-led
APPLICATION	Procuring goods: - Transactional items - Cost as the main focus	Sourcing strategic partners: - Strategic requirement - Complex sourcing needs

Now that we have a clear understanding of the main differences, let's go deeper into the methodology of implementing these changes, and how it can benefit your business, your travellers and your program.



Methodology:

How to build an RFPartnership

The purpose of any bid process is to find the right supplier to help solve a business need. An article on CIO.com claims: “[The leader] needs to find a suitable supplier to solve a business need. But all too often, what gets translated into the bid documents is the buying organisation’s defining specifications for a product or task.”

This, it says, is the ‘outsourcing paradox’, where the needs of the end user get diluted through the bidding process, reducing the strategic needs down to transactional, check-list items.

Making the move to RFPartnership is one way to navigate this paradox. Whilst it may feel like you’re entering uncharted waters, the reality is that getting the RFP process right—be it proposal or partnership—will save you time, money and credibility down the line.

If we are going to bang the drum for RFPartnership, then in true FCM style, we need to walk the walk. We need to work with you and give you the tools and insights you need to make the transition.

Below, we have listed the main steps to take to elevate your RFProposal to an RFPartnership. Perhaps not every step will resonate—and that’s fine. Every company is unique and has their own goals, objectives and aims. What this section seeks to do is to help you investigate your own travel program and make the strategic decision of how to rewrite the rules of the RFP to source the right supplier for your business needs.

Pre-work

Before you open up that blank document and start planning your questions, there's a whole raft of pre-work that needs to be undertaken to ensure you get the best results from the process.

1. Program strategy

The starting point for any bid—be it an RFProposal or an RFPartnership—is having a clear program strategy in place. This is not a simple or easy task, but it is the foundation upon which the rest of the process will rest, so it needs to be given substantial time and attention. As Head of Consulting for **FESTIVE ROAD**, Lora Ellis, describes it: “You need to get your house in order. Know where you're going and don't get distracted.”

Consider the following:

- Your program's purpose in the context of wider company objectives
- Your vision for the travel program
- What are your strategic priorities (and do they align to corporate priorities)?
- Do you know your company values?
- How well do you understand the ambition for the travel program?
- Are you partnering, building or procuring?
- What are your business requirements—regional availability, tech capabilities, local languages, payment methods, content, user experience etc.
- Do you know which elements are working currently and which are not?
- What do you need to change and what can be kept?

Whilst this isn't an exhaustive list, it is a great starting point for deep reflection and consideration of where you want your program to be. And, more importantly, who will be the right supplier to get you there.

“You need to be prepared. Where do you want to go? What is your strategy? And how does the RFP accomplish this?”

PASCAL JUNGFER - AREKA

2. RFP avoidance

The reasons for going to market can be vast and varied. But one enduring theme is a breakdown in relationship between buyer and supplier.

“You need to ask yourself ‘What's the problem and who or what is causing it?’” explains Lora.

Quite often, if the problem is internal to the business procuring the travel services, going to RFP, be it proposal or partnership, won't solve the underlying issue.

“We often suggest a ‘relationship reset’ for our clients,” says Lora. “After a course of mediation, we find it's a 50/50 split between reset or RFP.”

There are many elements that can lead to a fracture in the relationship between buyer and supplier. Some can be avoided by laying the right foundations during the procurement phase.

We repeatedly heard our experts talk about trust, being heard, alignment, understanding and shared goals. Without taking the time to establish these at the very start of a relationship, you could find yourself in mediation or going out to market within a few years.

***The best way to avoid RFP?
Build a partnership.***





“The most successful RFPs are carefully crafted by the client around their objectives, not repurposing a standard template.”

LAURA NELSON, DIRECTOR OF PROPOSAL MANAGEMENT - FCM

The RFP

Once the pre-work is completed, it's time to start crafting the RFP document.

01

Define your problem

Every single expert we spoke to unanimously agreed that knowing, and then clearly communicating why you're going out to market and what you hope to achieve from the process, is crucial. The work carried out in defining and creating your strategy will pay dividends here.

This initial step can make or break for the entire process, and where the aforementioned 'outsourcing paradox' comes into play. Whilst a traditional RFP proposal may take the pain point and boil it down to the need for a service, an RFP Partnership dives deeper. It allows you to explore the issues at hand, share pain points transparently, and ultimately begin to build trust.

“It all begins with the buyer. You need to be honest and clear about your core objective, make it as simple as possible—no fluff, just stick to the main point,” says Michael Lyons, Global Travel Manager - JLL.

02

Alignment to company objectives

Knowing your problem, and defining it clearly and simply, is only the beginning. The next step in creating a successful RFP Partnership document is to ensure that the procurement process is aligned to company objectives.

Misalignment to company objectives invariably leads to a lack of buy in from senior stakeholders, jeopardising the project from the very start.

This issue isn't as significant for a standard RFP proposal, although it can cause sticking points. If you're looking to form a true partnership, transparency and a deep understanding of the overall business direction can help in two ways:

1. Helps your assessment of potential partners.
2. Gives suppliers additional insights to be able to assess if they are the right fit to meet these goals.

“You have to know if there's an appetite for change. Are your objectives aligned? You need to know this ahead of time or it will stop decisions from happening,” says FESTIVE ROAD's Lora.

03

Your priorities

During the pre-work phase you should have defined your strategic priorities, which can now find their way into the RFP Partnership document.

“Both sides need to be honest and open. There has to be that transparency, that willingness to share. Once we know what the buyer is looking to achieve, then we can build a solution,” explains Michael Hook, Director of Sales, Americas - FCM.

Without this in-depth sharing of priorities, strategy and goals, many suppliers simply cannot present the solutions buyers need to see. A traditional RFP proposal may focus more heavily on gathering breadth of information from the supplier. The RFP Partnership approach recognises the need for detailed, specific information, enabling suppliers to create solutions to the pain points and issues your travel program is facing.

04

Data, data, data

Access to data is key to enabling transparency and ensuring all parties have the information they require to craft the right response. By providing insights into your pain point, you are painting a clearer picture for your potential partners.

“You don’t necessarily need to gain all the information, but if there isn’t that transparency, if there isn’t that willingness to share, how do we know what we can solution for them?” explains Michael.

And don’t just consider data to be handing over reams of management information reports. Lisa Pobjoy, Enterprise Sales Director – FCM, explains: “Meet and greet sessions pre-RFP are a great way to get to know each other. In one meeting you can find out the client’s strategy, ask questions, understand pain points—all of which help deliver a tailored, direct, personalised response. It’s an investment piece.”

05

Questions for the answers you want

Many RFPProposals include rafts of questions, the answers to which hold little to no sway over your decision making.

Through your pre-work, you should have established your priorities, goals and values. It is here that those foundations come into play. When crafting your questions, know what answers you are looking for.

Write the questions in a way that will not only make it easy for the right partner to demonstrate their capabilities, but equally as easy for you to identify if they are a great fit or not.

“It’s incumbent upon the buyer to craft an RFP which really supports their needs and objectives, with three perspectives in mind: the travel program, the company and the traveller experience,” says FCM’s Laura.

Alongside this, she recommends clients “provide clear questions that are not cryptic. We often have to get on a call and read through the questions with the salesperson, as the questions are often not really clear or are open to interpretation.”

“We need to understand what value is to [our clients] and what we can provide in return.”

MELISSA ELF, GLOBAL CHIEF OPERATING OFFICER - FCM

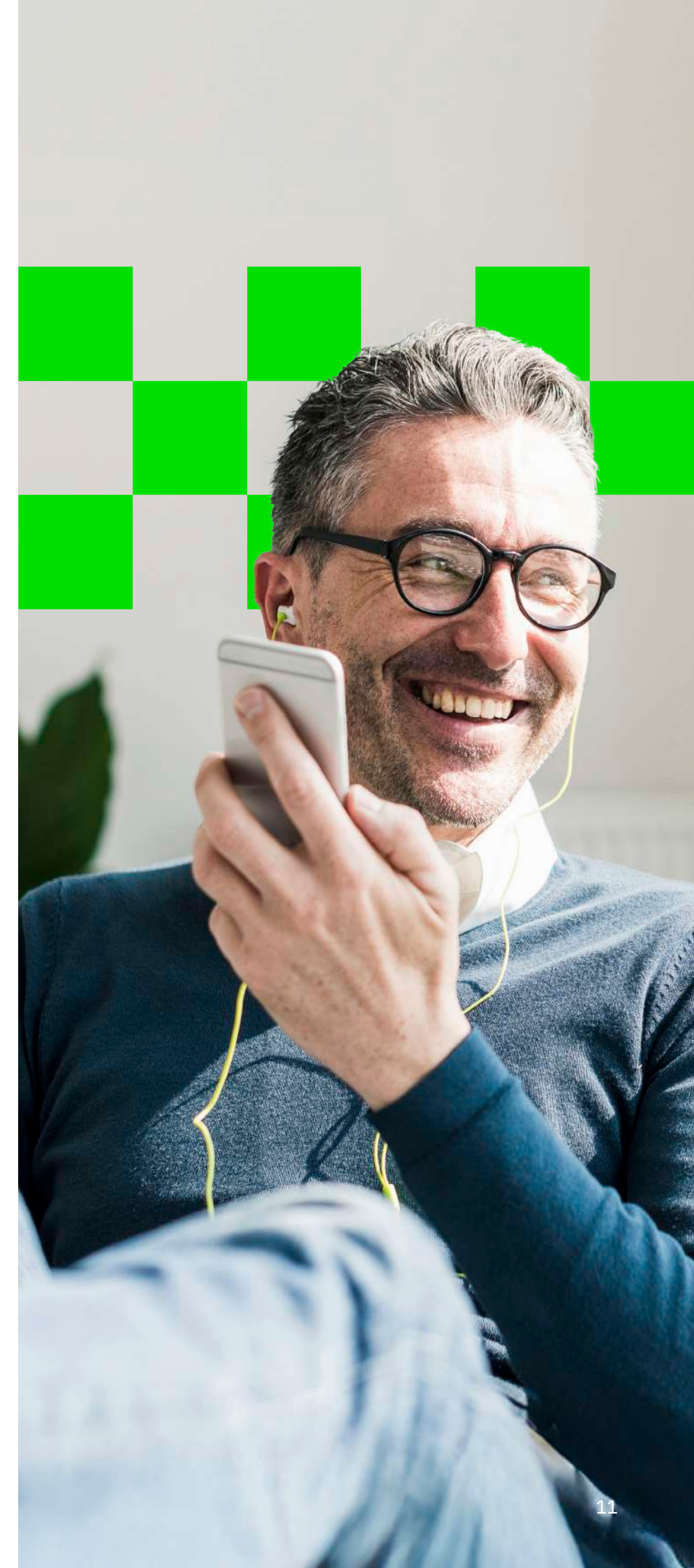
06

Evaluation techniques

Traditional RFPProposals often feature structured scoring systems to ensure parity and fairness when assessing bids. However, do these techniques evaluate the areas that are of importance to you and your travel program, or are they tick boxes on a form designed by someone else?

Making the move to RFPPartnership requires a new way of evaluating responses. You are no longer basing your decision solely on quantitative measures, such as technical capabilities or lowest costs, but on intangible aspects such as cultural fit and perceived value of the solution proposed.

These are drastically different things. The best technology or the lowest price doesn’t automatically equate to the best partner for your business—if partnership is your aim. Once again, you will need to reflect on the pre-work and ensure that your evaluation techniques are aligned to your goals and values.



“When you’re evaluating, you need to hone in on how they are a good, long-term partner. How will they prove themselves? Don’t get lost with bright and shiny distractions.”

MICHAEL LYONS, GLOBAL TRAVEL
MANAGER - JLL

07

Cultural assessment

Cultural fit is perhaps one of the most difficult elements to capture through a traditional RFP process. But, without a doubt, is one of the most important. Our experts were unanimous in their view: Alignment in this area ensures the business you choose to work with matches your business values and culture.

But how do you do this when the current rules limit you to a document and a list of approved questions?

“Instead of just issuing written RFPs with a million questions, do a workshop. Have a face-to-face session to discuss cultural alignment. We encourage our clients to have an actual conversation about the questions,” explains Lora.

Reimagining the process and including additional steps, such as a cultural alignment meeting, brings us another step closer to securing a partner, rather than a supplier.

“Looking at the cultural fit is fundamental. There’s not enough time invested in exploring that when people do go to market.”

BILLY MCDONOUGH, PRESIDENT,
AMERICAS - FCM





08

Cross functional resource

No-one is an island. And an RFP doesn't happen on its own. On average, companies involve a total of nine people in the creation of every RFP and this average has stayed consistent since 2021, according to a study by RFP software provider Loopio. When considering the departments that need to be involved, the experts we spoke with all concurred that a successful RFP Partnership process needs to include stakeholders from all the following departments:

- Procurement (if you don't sit in that team already!)
- HR
- Finance
- Management Information
- IT
- Legal
- C-suite

Not only will they share different perspectives and requirements, but they will need to be involved in the contracting, implementation, comms, training and everything else that goes along with changing TMCs.

"You need to understand what's on their plate to support this. Are they going to be able to support this? What's their calendar? It may look like it's a six-month process to you, but in fact it's 24 months, because you've not checked in with the teams that will be supporting delivery," states Michael Lyons.

Without understanding your business priorities, you could be jeopardising the process before it has even begun.

09

Collaboration is key

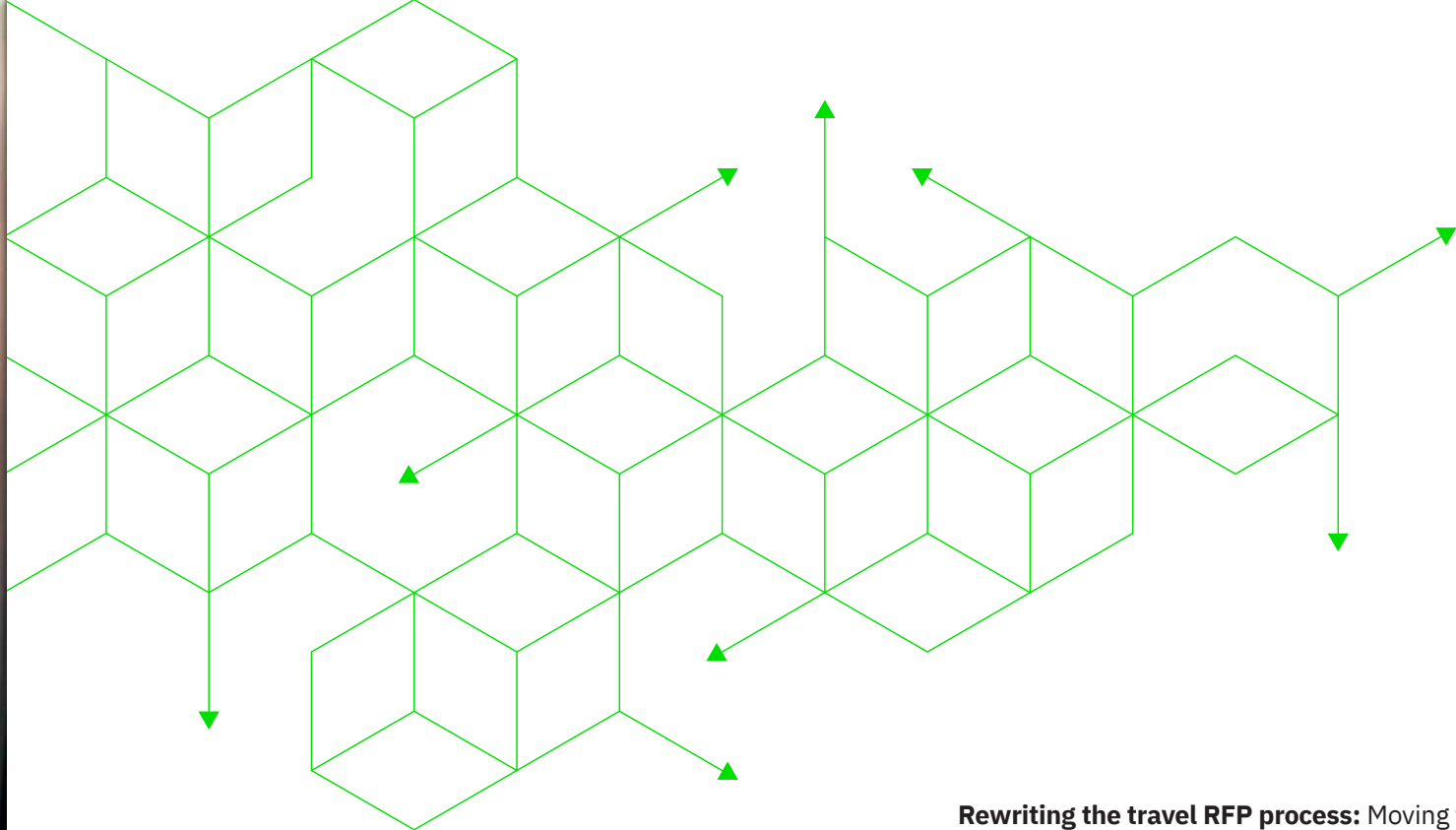
A key differentiator of the RFP Partnership model is the communication and collaboration between the buyer and supplier. In an ideal scenario your internal, cross-functional team would work together with their counterparts on the supplier side to co-create the best solution before the contract is even awarded.

Not only does this enhanced level of co-operation increase the likelihood of securing a great partner, but it also sets the scene for the future. You have the chance to 'try before you buy' and test out each other's ways of working.

"Is the supplier listening? Do they understand? Are they presenting solutions that actually solve your issues?" asks Lora Ellis. Through collaborating and adopting an RFP Partnership process, you can assess culture and ways of working that simply cannot be replicated in a written Q&A format.

"You need engagement to deliver a meaningful outcome."

LISA POBJOY, ENTERPRISE SALES
DIRECTOR, FCM TRAVEL



10

Handling proprietary questions

In most RFProposal scenarios, questions submitted by potential suppliers, and the client's answers, are shared with everyone in the process. This is rationalised as creating a fair playing field and ensuring all respondents have all the information.

In an RFPartnership process however, questions—and subsequent answers—are not shared. The idea is to create an open dialogue between the client and the supplier, leading to greater levels of transparency from both sides, as there is no longer the concern of 'trade secrets' becoming common knowledge.

These tactics mean the process is both personal and tailored. If your outcome is to establish long-term, aligned relationships, then modifying your approach to foster an environment of trust and collaboration from the very beginning sets the tone.



11

Contracting

Tough contract negotiations are not uncommon in a traditional RFProposal process. Worst case scenario: a common ground can't be found and the process collapses. Given the time and effort from a vast array of people on both sides of the process, this is a situation we want to avoid at all costs.

In an RFPartnership, the contracting phase of the bid is incorporated into the process. This not only removes the risk of the process stalling at contracting stage, but it also sheds further light onto the ways both you and your potential supplier work. These conversations can happen at any point in the RFPartnership process—what is vital is that they are included before you reach the evaluation phase.

“In my experience, the main areas that can derail a win after the fact are privacy language, pricing and IT security,” shares Michael Hook. “Examining these areas before awarding is critical.”

Due to the complex nature of procuring a TMC, contracting remains a critical component in the sourcing process. Due diligence and recorded answers are key for both companies, meaning that whilst there is undoubtedly a need to rewrite some rules, certain elements are non-negotiable from a legal perspective.

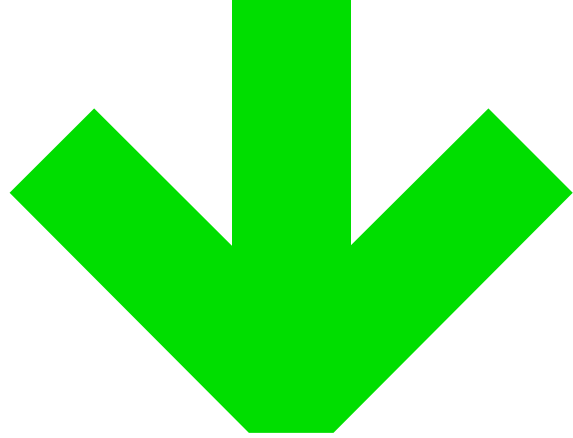
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Team structure

The RFP process, whether RFProposal or RFPartnership, is a significant investment in time, money and resource but the value, when done right, is immense. And it is only the beginning. Like the Opening Ceremony of the Olympic Games, it is a monumental undertaking, but it's not the main event.

It makes sense then that the team delivering the bid should, in the main, continue to be the team you work with on awarding them the contract. After all, if you have followed the previous RFPartnership methodology steps, you will have begun to build solutions, relationships and ways of working with members of the supplier's team.

CIO.com supports this practice. They claim that RFPartnership best practice dictates “at least a third and up to 80% of the supplier's [bid] team is part of a stay-behind team to ramp up and operationalise the solution.” If this isn't currently the way your bid process has been run, now is the time to discuss with potential suppliers just exactly who is involved in the RFP process and who will be continuing the work you have started, should they win your business.



Takeaways:

RFPproposal vs. RFPpartnership

Through contextualising the issues, demonstrating the differences in approach and deep diving into the methodology, we have demonstrated the benefits of making the move to RFPpartnership. To help you lead the change in your organisations, here is an ‘at a glance’ summary of the key differences and benefits to moving towards RFPpartnership.

	RFPproposal	RFPpartnership	Benefits
PURPOSE	A document outlining a business requirement for a specific product or task	An outline of the business’ objectives, benefits and expectations, inviting new partners to come forward and collaborate	Knowing your ‘why’ and spending time defining your purpose not only helps potential suppliers to more accurately meet your needs but also aids your evaluation process by having a clear focus.
PRE-WORK	Minimal pre-work required, with the exception of building the questionnaire	Strategic planning, value alignment, supplier workshops and internal input required	Whilst you can save time here re-using an RFP template, it is unlikely to give you the insight required to make an informed decision. Investing time in the pre-work will give the project focus and higher probability of selecting the right long-term partner
PROCESS	Largely transactional. Presenting suppliers with a list of questions in a basic format which they are required to complete and submit as a first stage	A collaborative process involving face to face meetings, workshops and written documents to assess both technical capability and cultural fit	Consider the evaluation process. Wading through several dense spreadsheets is a difficult and time-consuming task. A process with more interaction and collaboration not only showcases supplier strengths more accurately but vastly improves the internal process of evaluation.
INFORMATION	Specific and wide-ranging information requested from the supplier about their business, qualifications, costs and timelines	Tailored questions to elicit capabilities and proposed solutions, as well as cultural understanding and fit. Information is specific and measured against business objectives for the overall project	The bid process should give you the answers to the issues that matter most to you and the business. The RFPpartnership approach produces a more tailored outcome, allowing better understanding of the solutions and suppliers available.
APPLICATION	The right process for procuring standardised goods or services	Preferred choice for sourcing a strategic partner to provide a tailored solution aligned with corporate strategy	Changing TMCs is a costly, time-consuming process. It is a strategic, business critical investment, and spending the time at this point will save you time, effort and money in the long term.

Conclusion

“The nature of what you buy should drive the approach to your bid process.”

CIO.COM.

We hope that by rewriting the rules of the RFP process, moving the business travel industry from RFProposal to RFPPartnership, we have empowered you to take the leap and make the change in your own business.

There is strong evidence that the current RFProposal process simply isn't working as well as it should for strategic travel management programs. This is not to say that it doesn't have a place within a procurement team's arsenal. But when it comes to sourcing a long-term, strategic partner who is culturally aligned with your business and goals – the RFProposal leaves a lot to be desired.

Business travel is on the cusp of its own revolution. From AI to sustainability, there are seismic changes coming down the road, where we will need to tear up the rule book, find a new way of working and inspire a new generation of travel and procurement professionals.

But the benefit isn't just one way.

Working towards a collaborative, long-term partnership approach benefits everyone in the business travel ecosystem. From saving travel professionals time and money, to providing travellers with a more consistent, tailored approach, to allowing TMCs and suppliers to deliver innovative new solutions, there are benefits for everyone involved.

We know that partnership is a crucial component to a successful travel program. So now is the time to take that sentiment and place it front and centre. State your intentions from the very beginning: You're seeking a partnership, not a proposal to transact.

This is a big statement, but one which we are not afraid to make. You can't rewrite the rules without breaking the old ones. The benefits are clear, the need for change is apparent and the appetite is there.

Not only is moving to RFPPartnership possible, it's already happening. And you don't just have to take our word for it – you can read about some of the RFP projects we've been working on recently and the clear benefits the RFPPartnership approach brings.

So, when you're ready, it's time to **rewrite the rules together.**



Quotes and acknowledgements

Thank you to all our expert contributors, who took the time to share their thoughts, insights and experiences of the RFP process.

“Governance is essential. It draws the line between success and failure.”

PASCAL JUNGFER, FOUNDING PARTNER AND CEO, AREKA

“Given how intertwined a travel program is with its TMC, it’s got to be a partnership. You’ve got to be walking in lockstep.”

MICHAEL LYONS, GLOBAL TRAVEL MANAGER, JLL

“The cost of change is higher than the cost of sourcing.”

LISA POBJOY, ENTERPRISE SALES DIRECTOR, FCM

“Long term partnerships should be the goal.”

LAURA NELSON, DIRECTOR OF PROPOSAL MANAGEMENT, FCM

“Depending on your program model, the TMC could be the most important relationship in your travel program.”

LORA ELLIS, HEAD OF CONSULTING, FESTIVE ROAD

“At the end of the day, when each side has found a mutual partner and they are benefitting from one another.”

MICHAEL HOOK, DIRECTOR OF SALES - AMERICAS, FCM

About FCM Travel

FCM is one of the world’s largest travel management companies and a trusted partner for thousands of national and multinational organisations. With a 24/7 reach in 95+ countries, FCM’s agile technology solves client needs and is supported by expert teams to provide the ultimate personalised business travel experience. As the flagship corporate brand of Flight Centre Travel Group, FCM delivers the most competitive rates and exclusive solutions for its clients. Alongside its travel management services, the company provides specialist services through FCM Consulting and FCM Meetings & Events. Discover the alternative at fcmtravel.com.

About temoji

temoji is a consulting & marketing specialist in the global corporate travel and meetings industry. We work with travel suppliers who thrive on continually improving how they serve their clients and travellers. temoji is the special ingredient to help travel suppliers connect deeper and deliver better to your clients, prospective customers and wider stakeholders. We’re the secret sauce.

And we believe that every challenge faced by our industry is solvable through the creation of better “Social and Intellectual Capital”.

...for travel’s emotive journey, find out more at www.temoji.co.uk