



# The Anatomy of an RFP Relocation Services

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# Agenda

- Definitions
- Pre-Work
- Development
- Launch
- Supplier Evaluation
- Supplier Selection
- Award Contract
- Transition



# Definitions

- RFI: Request for Information is used when companies need to define qualified participants
- RFP: Request for Proposal is used for a complete supplier selection process
- RFQ: Request for Pricing is used when companies are simply testing the market to ensure current fees are competitive
- SLAs: Service Level Agreements
- KPIs: Key Performance Indicators
- NDA: Non-Disclosure Agreement
- SOW: Scope of Work

# Pre-Work (30 days)

- Define overall goals and objectives (why?)
- Establish transition team of key stakeholders (i.e. HR, business, procurement, tax, legal, finance, IT)
- Outline the process, budget constraints and a timeline through implementation
- Define SOW
- Create a weighted evaluation matrix
  - financial stability, services offered, team, locations, technology, fees
- Create a pricing matrix per SOW
- Identify participants thru RFI, interviews or site visits
  - include suppliers with an existing business relationship



# Vendor Specific Issues

- Global legal firms
- Global immigration firms
- Global tax services
- Data privacy
- Global HR services
  - Compensation
  - Performance management
  - Training
- Global moving and relocation
  - Shipping
  - Home rental

# Development (30 days)

- Include the following:
  - goals/objectives (performance and financial) and timelines
  - company background/fact sheet
  - program trends and future vision with no guarantee of future volumes
  - instructions (company contact person, max pages, format, deadlines, submission)
  - Intent to Respond including NDA
  - detailed SOW
  - pricing matrix template (required pricing format)
    - eSourcing tool/online reverse auction training session

# Development (contd.)

- Ask questions that will impact selection:
  - the type and quality services
  - account team location(s) and bios (certifications?)
  - geographic reach/office locations
  - client references (similar scope)
  - technology capabilities
- Request the following:
  - transition plan
  - list of standard reports and examples
  - list of standard KPIs/SLAs

*Respect the suppliers' time and investment*



# Launch (15 days)

- distribute the RFP
- record receipt of Intent to Respond/NDA
- schedule conf call for all participant Q&As
  - distribute documented Q&As to all participants
- briefly review RFP responses
  - disqualify noncompliant participants and notify accordingly

# Supplier Evaluation (45 days)

- distribute qualified proposals to evaluation team members to review RFPs
- prepare cost analysis and investigate pricing discrepancies
- evaluate and score the responses in the evaluation matrix, identifying at least two finalists
- conduct site visits with finalists for oral presentations at suppliers office to see operations and meet team
- check finalists references

# Supplier Selection (30 days)

- present recommendation to senior management
- notify suppliers not awarded first, then the selected supplier
  - *Suppliers not awarded deserve a call clarifying why and providing them with feedback based on time invested in the process. Formal written email can be sent after the call.*
- communicate internally about the selection of new service provider accordingly (HR, management, impacted employees)
- conduct a wrap-up meeting with internal transition team within two weeks of selection to discuss lessons learned

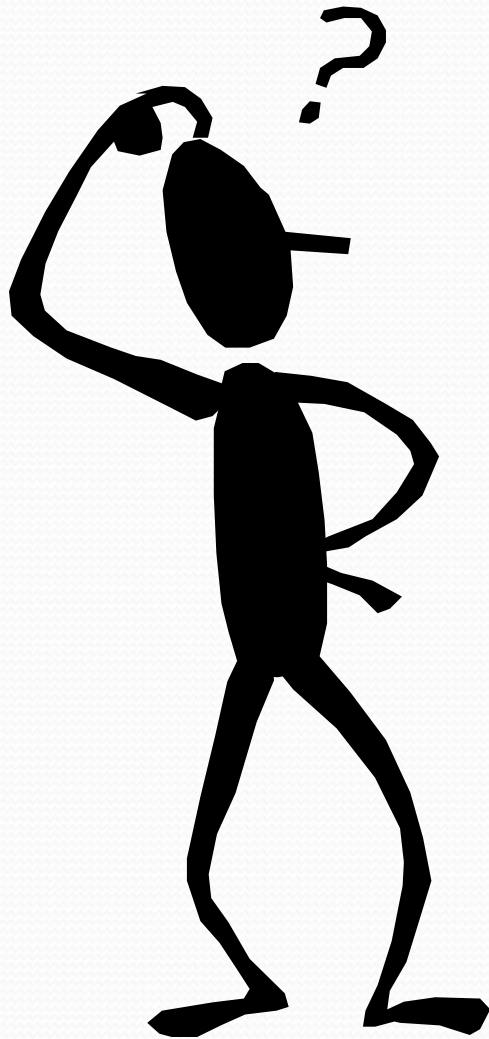
# Award Contract (30 days)

- execute the completed contract prior to go-live date
- co-develop supplier SLAs/KPIs (obtainable)
  - review and modify annually
  - attach as addendum for ease in updating annually

*All modifications to the SOW should be reflected in an amendment so it is in writing.*

# Transition (30-90 days)

- co-develop transition and implementation plan
- share transition plan with
- schedule regular meetings with transition teams (both internal and external)



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