



# The travel **RFP toolkit**

Your practical  
template for sourcing  
the right travel  
management partner





## The Request for Proposal (RFP) process is a critical step in selecting the right travel management company (TMC).

Managed effectively, it can form the foundation of a long-term, high-value partnership built on trust and strategically aligned to your organization's short and long-term goals.

Choosing a TMC with the vision, expertise, and capacity to design travel programs that meet your business needs today and adapt for the future is key to achieving a high-performing

travel program and a supported, productive workforce.

This hands-on resource provides a framework for building and evaluating your travel management RFP. From defining objectives and evaluation criteria to process and timelines and TMC questions. It's everything you need to run a confident and transparent RFP process.

# Your RFP template

The following RFP template consolidates common questions to help organizations evaluate potential travel management partners.

Adapt the template by removing irrelevant sections and adding questions unique to your business needs. A structured question set and transparent scoring process will simplify evaluation and support the success of your future travel program.



You want to **partner with a TMC** that will not only help you meet your business objectives, but fits with your corporate culture. Tell them who you are, what your program currently looks like, and what you want in a travel provider.



# RFP overview & evaluation criteria

1

## Overview

Insert a brief overview of your organization. Consider including industry information, market position, business footprint, vision statement, and value proposition. If applicable, you may also want to include any business planning and growth expectations.

2

## Current travel program

Provide key program details including:

- a list of markets in which your business operates
- annual travel spend in each market broken into:
  - total annual travel spend
  - modes of transport – air, car, hotel, ground transport, taxi, other
  - online versus offline bookings
  - international versus domestic bookings
- current service configuration
- current suppliers and contracted agreements
- duty-of-care program
- key travel routes
- payment methods
- technologies in use (booking, risk management, reporting, expense management)

3

## Key objectives

Outline your key objectives for an improved travel management solution here:

- consider including the short-term and long-term objectives of:
  - your RFP process
  - your travel program
  - your business plan
- consider listing current challenges (e.g., cost management, traveler well-being, sustainability, technology adoption, NDC content access)

## 4

## Requirements

The following is a sample of possible program requirements you may wish to consider.

- ✓ Regional, in-house travel consulting and account management teams
- ✓ Intuitive online travel tools and apps
- ✓ Solutions for managing unused ticket credits
- ✓ 24/7 global travel support
- ✓ Global traveler tracking and emergency communications tools
- ✓ Enhanced data security and privacy measures.
- ✓ Consistent and measurable service level agreements
- ✓ Regular travel program reporting, policy reviews and enhancements
- ✓ Flexible payment solutions and virtual cards
- ✓ A flexible service model based on specific market needs, objectives and challenges
- ✓ Training
- ✓ Access to NDC content
- ✓ An accurate and accessible reporting tool to consolidate travel data across markets, departments and cost centers
- ✓ Access to breaking travel news and developments
- ✓ AI-powered customer support tools
- ✓ A competitive financial offer
- ✓ Strategic meetings, events, and group travel management
- ✓ Seamless integration with HR and expense management systems
- ✓ Technology solutions relevant for the market(s) operated in
- ✓ Sustainability tools (carbon reporting, SAF scores)
- ✓ Advanced analytics and predictive insights - spend, well-being, sustainability, booking behavior etc

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## Evaluation

Reduce the list of potential suppliers to a short list based on the evaluation criteria and scoring methodology applied to all responses.

CRITERIA	WEIGHTING
Service delivery	%
Innovation of products and services	%
Duty-of-care solutions	%
Strategic policy development and account management	%
After-hours service	%
Quality control	%
Access to content	%
Comparable industry experience/customer portfolio	%
Data security and privacy measures	%

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## Process and timeline

### RFP TIMELINE

	DATE
RFP release	DATE
Notice of intent to bid	DATE
TMC question due	DATE
TMC questions answered	DATE
Proposal due	DATE
Finalist presentation	DATE
Winner notified	DATE
Implementation	DATE

Notice of intent to bid must be received by [DATE] and [TIME]. The notice should be emailed to [NAME], [ROLE] at [EMAIL].

We request that you observe the following conditions in completing the RFP:

- All bids must be completed in the corresponding sections of the provided document and submitted electronically.
- Please respect instructions on the length of responses as this is especially important for us to be able to properly compare and score your response.

- Proposals should not contain unsolicited, extraneous or duplicative information.
- Please respect the deadlines specified and remember to submit your response by [TIME] on [DAY] [DATE].

### Contact Information

The following designated contact should be used for all queries relating to this RFP.

Name:  
Title:  
Phone:  
Email:

# TMC questions

Once you've outlined your organization's objectives and evaluation criteria, use these TMC questions to gather detailed, comparable responses from TMC providers.

## 1 Executive summary

Provide an executive summary outlining how your company differentiates from other TMCs. Why should we choose you?



**Consider a page limit for the responses** to provide clear and concise answers and help the TMC show innovation and creativity.

## 2 Agency profile

- Agency name, address, and contact information (telephone and email).
- Type of business entity (e.g., corporation, partnership, limited liability company (LLC), sole proprietorship, etc.).
- Provide an overview of your global network and how you currently manage programs for comparable clients.
- Number of years in business.
- Annual revenues (local currency) and travel volumes (air, car, hotel, ground transportation) globally and across Australia and New Zealand.

- Location of the primary offices
- Please provide your agency's latest financial report.
- Provide two references and contact information for a current client similar in size and scope
- What do you consider to be your company's unique selling points?

## 3 Account management

- Based on the nature of our business operations and travel requirements, what service configuration would you propose for optimal efficiency and cost-savings?
- Please explain your proposed account management solution
- How many accounts will our nominated Account Manager oversee simultaneously?
- Please provide a sample of a recent account review.
- How often will you provide account reviews?
- Describe your agency's plan to monitor service levels, including problem resolution procedures.
- Beyond dedicated account management personnel, what other resources will be engaged to optimize our travel program (e.g., consulting, supplier relations support, product development, marketing, etc.)? Detail fees, if any, associated with these support services.

## 4 Implementation

- Summarize your new customer implementation process and include a proposed timeline as well as defining the roles of each party involved.
- How will you support our company during the implementation process?
- What methods will you take to overcome resistance to change?
- Please provide a change management communication plan.
- What training will be available for travelers and travel arrangers?



**Balance qualitative and quantitative questions to your potential partners.** Use these sections to assess market coverage and financial stability, and also cultural fit. Are they flexible? Do they focus more on costs or on service? Will they fit your corporate culture and local culture in each market? Are they a good long-term partner?

## 5 Duty of care

- Provide detail in what level of support is included within your system, including traveler tracking.
- How will you inform our company of breaking travel news, security advisories and market updates?
- How do you support travelers in emergency situations?
- Do you provide risk alerts? If so, how?
- Can you work with independent risk management providers?
- Explain your ability to assist with passport and visa processing.

More than ever, **companies have a responsibility for ensuring their employees are safe** while traveling and up-to-date information is not always easy for travelers to access. Ensure your TMC partner can provide all the technology and services you need to support confident buying choices and travel experiences.



## 6 Operations

- Please describe the structure of the service delivery teams that will be managing our account, including where the team will be located.
- Describe how the service delivery team will be trained to support the company travel policy.
- What are your standard hours of operation?
- How do you handle after-hours support? Who owns and operates these services and where are they located?
- How do the travel consultants stay aware of our requirements?
- What is the process for traveler profile maintenance?

## 7 Travel technology

- Do you have an in-house technology team that develops customer facing technology or do you rely on third-party providers? If in-house, how many staff are in this team and where are they based?
- What online booking platforms does your agency support?
- Which OBT(s) would you recommend for our travel program and why?
- Please explain your travel approval process and tools.
- Describe your mobile and portal technology solutions.
- How can you improve our online adoption rate?

- Do you provide technical support for our travelers and is there an extra fee?
- What tools do you provide to assist travelers in planning their travel to be most cost effective?
- Describe what solutions you offer that may assist in managing and reducing taxi/rideshare or car rental expenditure.
- What AI powered travel solutions do you offer to support travel bookers and travelers?
- How do your platforms integrate with HR, payroll, and expense systems?

## 8 Reporting

- Please describe your reporting solution.
- How do you support predictive analytics and reporting?
- What file formats and delivery options are available?
- Can we access self-generated reports?
- What is included in your standard management information (MI)?
- Are you able to consolidate data from other TMCs?
- How quickly will data be available?
- How do you measure data quality?
- Are you able to provide carbon emission reports?
- Please provide recent examples of your reporting.
- How do you measure traveler well-being?

## 9 Data Protection

- How do you ensure travel data will always remain confidential?
- Do you hold any data security accreditations (e.g., PCI compliance, ISO certifications, etc.)?
- Please describe your disaster recovery plans.

## 10 Travel Content

- Please discuss your non-GDS content solutions, including low-cost carriers and booking processes noting any non-GDS technology you use. Is this applicable to each market?
- How do you ensure access to multi-source content (GDS, NDC, APIs, direct supplier)?
- Describe how your agency can deliver incremental savings beyond transaction fee savings.
- Do you provide forecasting tools that can assist with the cheapest days to travel?

## 11 Sustainability and Social Responsibility

- What practices do you have in place to reduce your environmental impact as a business?
- Do you show the carbon footprint estimate within online and offline bookings for our travelers to understand the environmental impact of their choices?
- What solutions can you offer to support sustainability initiatives and ESG goals?

- Please attach any relevant policies relating to Corporate Social Responsibility (CSR) that your organization has implemented or committed to?

## 12 Meetings and Events

- Describe your meetings management, group travel and corporate events offering.
- Can you provide meetings and events management on a global basis?

## 13 Billing

- Please advise what payment options you offer and if you have a preferred or recommend solution?
- Does your agency customize invoices to include budget or departmental coding?
- Explain your process for voids, cancellations and refunds.

## 14 Pricing

- Please provide a clear breakdown of your service fees and pricing structure relevant to our travel program, including optional or other service costs.
- Specifically address offline versus online transactions.



**Provide the TMC a pricing template** for required and optional services to accurately compare across providers.





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NEW ZEALAND  
NORTH AMERICA  
ASIA  
EUROPE

CTM is proud to share this framework and template to support better travel procurement outcomes.  
**For more insights or guidance, contact the CTM team.**

