

SAMPLE RELOCATION RFP QUESTIONS

*Over 100 questions to help you on your path to creating
a successful relocation RFP*

Building a Request for Proposal, or RFP, for employee relocations services can be a time-consuming process, but it doesn't have to be. As an over 20-year leader in the relocation industry, we've compiled a list of over 100 different RFP questions that can help you choose what you want to learn most from participating Relocation Management Companies (RMCs). These questions will help you fully understand what each RMC has to offer you and, ultimately, make it easier for you to choose the RMC that best fits your needs.

1.0 COMPANY OVERVIEW QUESTIONS

- 1.1 Describe your company's history and background including the number of years your company has been in business.
- 1.2 Please list the location of your corporate headquarters and any other supporting offices.
- 1.3 Describe your organizational structure and methodology and how it relates to supporting your clients' global mobility goals.
- 1.4 Include/provide a top-level organizational chart.
- 1.5 Do you provide services globally? List countries where services are provided.
- 1.6 Are there any countries where you cannot provide services? Please list and explain.
- 1.7 List any alliances or affiliations you have with any other organizations (e.g. moving companies, real estate companies, etc.).

Have a clear idea of the criteria most important to you before you create an RFP.

Questions regarding RMC independence are important because independent companies without affiliations typically offer better pricing.

- 1.8 Identify partnerships and services from which your company receives any type of revenue, e.g. referral fee, rebate, commission, marketing fee, service fee, internal revenue allocation, etc.
- 1.9 Does your firm mark up any supplier invoices at time of invoicing? If so, please provide the supplier name and mark-up amount for each.
- 1.10 Do you outsource any work to an offshore or foreign entity?
- 1.11 Is your company owned by a parent company? What is your parent's core business?
- 1.12 Is your company or any subsidiary involved in providing relocation services "For Sale" or otherwise anticipating or currently involved with a merger, acquisition, divestiture or other relationship? If so, please explain.

- 1.13 Describe any past or pending litigation within the last five years relating to the services you are proposing.
- 1.14 Please provide the total number of domestic and international employee relocations per year that you service.
- 1.15 Has your company or an affiliate ever filed for bankruptcy? If so, please explain.
- 1.16 Please provide information on your company's financial condition by including your company's last two annual financial statements or audited reports.

2.0 CLIENT ENGAGEMENT QUESTIONS

- 2.1 Please provide a list of references with focus on clients of comparable size or like industry. Also, please provide contact information for a client that has recently terminated your service in the past three years. Please do not include any clients lost due to an acquisition and/or divestiture.
- 2.2 How many clients do you currently provide relocation services to? How many companies of our size (i.e., average number of relocations annually) or similar do you serve?
- 2.3 How often do you meet with clients? Who regularly attends these meetings? What is the typical agenda of these meetings?
- 2.4 How do you keep clients informed of significant developments in the relocation field?

A well-rounded RFP typically has no more than 50 questions, so be sure to focus on the questions that are most important to you.

3.0 STAFFING, TRAINING, & RECRUITING QUESTIONS

- 3.1 How do you recruit and select employees?
- 3.2 Do you conduct background checks on employee candidates?
- 3.3 How do you train staff on client accounts including company policies, programs, and culture? What would be the process of creating these and managing the flow of information?

Understanding how the RMC invests in their own employees can help you understand how they will work with yours.

- 3.4 What is the average and maximum number of relocation files an individual | counselor will handle?
- 3.5 How will you handle volume surges (e.g. group moves, peak season, etc.) and ensure consistent, high-quality service for our transferees?
- 3.6 Please provide details of your company's provisions for providing ongoing training/skill enhancement for your client service staff members.

- 3.7 Aside from base salary, how are employees rewarded for or encouraged to provide outstanding client service performance? Describe your employee performance evaluation program.
- 3.8 Do you require employees to obtain industry certifications and if so, what certifications are required?
- 3.9 Is your staff available on evenings and weekends? If not, explain the methods by which your staff can be reached during off-hours or for international support.

4.0 SERVICE DELIVERY AND PROCESSES QUESTIONS

- 4.1 Do you have a single point of contact for the transferees? Describe your client service model.
- 4.2 Describe your process for managing the initial contact with a relocating employee to determine their specific requirements. How quickly is contact initiated? Differentiate which counseling services would be provided locally in the destination city (e.g., in person) and which would be provided by a central point of contact at your firm (e.g., via telephone and email).
- 4.3 What is your company's step-by-step homesale process?
- 4.4 How will you deliver home marketing, sale, and other related departure services for homeowners?
- 4.5 Please describe your Inventory Management process.
- 4.6 What services do you offer to assist homeowners in finding a home in the new location?
- 4.7 Please describe your Rental Assistance process.
- 4.8 What other destination services do you provide?
- 4.9 Describe your Mortgage Assistance process.
- 4.10 Are there any required services that you will not be able to provide?

***Service delivery questions
will allow you to understand
how each RMC works and
communicates with your
relocating employees.***

5.0 QUALITY ASSURANCE QUESTIONS

- 5.1 Please provide information on how your quality control programs are administered and how your employees are evaluated.
- 5.2 How do you ensure high-quality, consistent service to our transferees?
- 5.3 What is your transferee survey return rate?
- 5.4 What is your transferee satisfaction score for the last 2 years?

- 5.5 What is your process for handling service escalations?
- 5.6 Do you guarantee service performance? If so, please describe.
- 5.7 Please describe in detail your method of ensuring quality and adherence to specifications in every step of the operation. Be sure to include an explanation of process controls and metrics or KPIs you have in place.

6.0 HOUSEHOLD GOODS (HHG) & STORAGE QUESTIONS

- 6.1 What is your criteria for selecting a HHG carrier?
- 6.2 How do you manage the HHG carrier's performance?
- 6.3 What is your process for managing HHG carriers that do not meet requirements?
- 6.4 What is the percent of on-time packing/loading and deliveries for your HHG carriers?
- 6.5 Does your company own the trucks/trailers that deliver the containers, or is this facilitated by a third-party?
- 6.6 Do you require the same driver to pack and unload the shipments that are not delivered to storage?
- 6.7 What is your process for managing international HHG insurance and claims?
- 6.8 What are your company's claims ratios for domestic and international moves for the past three years?
- 6.9 What is your audit process?

Ask questions in a manner that allows you to easily compare across all responses.

7.0 TECHNOLOGY QUESTIONS

- 7.1 Do you have an online system that can be used by your clients? What are the system's capabilities?

After the RFP process is complete, have your top candidates present a demo of their technology/system.

- 7.2 Do you have an online system that can be used by our transferees? What are the system's capabilities?
- 7.3 Do you have a transferee smart phone app? What are its capabilities?
- 7.4 Do you offer standardized and ad-hoc tracking and reporting capabilities? What is the cost of these reports?
- 7.5 Does your technology platform represent real-time data within the hour of input?

- 7.6 Is your technology purchased “off the shelf” or developed internally?
- 7.7 Describe your management reports and provide samples.
- 7.8 How does your technology support your accounting and reporting services?
- 7.9 What controls are in place to protect data (e.g. firewalls, security monitoring, virus protection, etc.)?
- 7.10 Can your system be customized to meet our specific needs? If so, please detail the cost related to customization.

Asking pointed technology questions allows you to fully understand how the RMC invests in their technology.

8.0 DATA SECURITY QUESTIONS

- 8.1 Describe your business disaster recovery program. How often is it examined and tested?
- 8.2 Describe your procedures and safeguards used to guarantee authorized access to data, confidentiality of data, and the security of any hard copy related data.
- 8.3 How do you guarantee or audit the security of your client/transferee data?

9.0 PROGRAM IMPLEMENTATION QUESTIONS

- 9.1 Describe the process and procedures for implementing a new client. Please include a timeline and key milestones of the process.

Make sure the RMC you choose can implement your relocation program in a timeframe that works for you and your relocating employees.

- 9.2 Please describe the team that would be assigned for the transition process. Will we have the same team for account management and implementation?
- 9.3 Do you foresee any additional transition costs?
- 9.4 Explain any alternate pricing or cost saving alternatives you feel we should consider.
- 9.5 How would your company manage the takeover of existing relocation files?

10.0 SUPPLIER MANAGEMENT QUESTIONS

- 10.1 Please describe your selection process and how you manage suppliers, e.g. real estate brokers, temporary housing providers, etc.

10.2 Are we required to use your third-party suppliers?

The RMC's own supplier network should be based on performance and cost, not affiliation.

10.3 How will you ensure that third-party suppliers are providing the most competitive price available?

10.4 Describe how your company is compensated for business conducted with suppliers (e.g. transaction fees, commissions, referral fees, etc.).

10.5 Describe any affiliations, exclusive arrangements, ownership interests, or other relationships you or your company has with any other organization providing relocation-related services (brokers, appraisers, title, inspection and mortgage companies, van lines, etc.).

10.6 Does your company charge memberships, access, training, or other related fees to your suppliers?

10.7 What is the process for monitoring the subcontractors on an ongoing basis, including quantitative and qualitative measures?

10.8 Please describe your process for identifying and correcting the failures or shortcomings of your subcontractors. Describe your procedures to remove non-performing suppliers.

10.9 Will you be transparent in all fees charged by third-party suppliers?

11.0 INTERNATIONAL SERVICE QUESTIONS

11.1 Please list and describe the global service offerings your firm provides.

11.2 Please explain how you manage your own network of immigration affiliates/partners with a global immigration company?

11.3 What standards are in place for international subcontractors?

11.4 Are there inherent differences in your services domestically vs. internationally?

11.5 Please describe how you manage transferees' visa and immigration requirements?

12.0 RELOCATION ACCOUNTING & PAYROLL SERVICE QUESTIONS

12.1 Please describe your exception submission and management process.

12.2 What are your payroll interface capabilities? Describe what is reported, the frequency and the method, and format (Excel, Word, et.). Are these available online? Ad-hoc?

12.3 Please describe your methodology of computing and managing tax-assisted expenses.

12.4 Describe your expense audit process.

Including pricing scenarios in your RFP can help you get a clearer idea of the RMC's pricing structure.

12.5 What is your preferred method of receiving payroll and tax-related data for relocating employees?

12.6 Please describe your process for reporting, preparing, and submitting statements of taxable and non-taxable relocation income for relocating employees, including frequency and timing capability to support client-specific business needs.

12.7 What is the average time from receipt of employee expense report to employee reimbursement?

13.0 ACCOUNT MANAGEMENT & PROGRAM DEVELOPMENT QUESTIONS

13.1 Describe your methodology for account management.

13.2 How often do you conduct management reviews? Please describe your company's perspective on the structure and content of these meetings.

13.3 Are the client relationship management and staff supporting the transferees reporting into the same team?

13.4 Describe any recent innovations you have introduced to improve service.

13.5 Describe the efforts your firm is making to raise current standards of performance in the relocation industry.

13.6 Describe your thought leadership services, including policy development, benchmarking, and best practices.

13.7 What process do you have in place to control costs?

13.8 Based on our relocation policy included within the RFP, please provide any recommended policy changes you would propose that might reduce costs and/or improve service levels?

Your new RMC should treat you like a partner, not just another account. Relocation trends and legislation change constantly, and it is essential your RMC keeps you informed on these changes.