

Sample RFP Questions





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We are not about just scheduling moves and coordinating transactions. We are in the future business. We are about moving people and companies to their future. We are about supporting the ability to live, work and thrive anywhere, across a lifetime.”

Barry Morris, President & CEO
CapRelo

About Us

CapRelo is a full-service global relocation management company that manages US domestic and global relocations and assignments annually for all sizes of companies – small to major multinationals alike. With 25 years of mobility expertise, we have established an extensive global footprint with presence in the Americas, EMEA and APAC. Your purpose drives our focus and allows us to be uniquely positioned to help you both acquire and retain the best talent. Our vision is lived by our staff, our daily interactions with clients and industry colleagues and our commitment to the communities we serve. We are proud to support the relocation needs for living, working, thriving anywhere across a lifetime.

About Us

150+

global clients

96%

transferee satisfaction

160

*countries serviced
from 6 offices*

The following sample Request for Proposal (RFP) questions are designed to assist you in issuing a competitive bid for relocation services. By using these questions, you will elicit from bidders the information you need to make an informed decision. You can use these questions to form the basis for your RFP and build in other questions you deem appropriate, based on your program requirements.

Company Profile

1. Please provide a brief history of your organization including:
 - number of years in business
 - number of employees
 - number and locations of offices
 - founding company structure (specify whether your company initially began as a Relocation Services provider or has evolved into its current state over time)
 - length of time the current ownership has been in place.
2. What is your corporate philosophy/mission?
3. Does your organization own a household goods carrier(s) or a mortgage provider(s) or other relocation-related company? If yes, please explain the relationship.
4. What is your client retention rate for the past three years?
5. List and describe three (3) competitive advantages your company has over the competition.
6. A description of respondent and all relevant affiliated entities and joint ventures (“Relevant Affiliates”). Relevant Affiliates include respondent’s parent, all affiliates of respondent over which respondent exercises management control and all affiliates of respondent which exercise management control over respondent.
7. Information indicating respondent’s financial strength and reliability, including where appropriate, corporate history; date of establishment; initial (if founded within the last ten years) and current capitalization; certified financial statements, including balance sheet and statements of income and cash flow, with respect to the two previous fiscal years and the most recent interim period; forms 10-K and 10-Q submitted to the United States Securities and Exchange Commission for the two previous fiscal years, if applicable.
8. Respondent shall provide a minimum of three (3) customer references of those that are being provided the service(s) described in this RFP. At a minimum, the respondent shall provide the company name, the location where the service(s) were provided; contact person(s), telephone number, e-mail address, and a complete description of the service(s) and dates the service(s) were provided. These references may be contacted to verify respondent’s ability to perform the contract. <<ClientNameShort>> reserves the right to use

any information or additional references deemed necessary to establish the ability of the respondent to perform the conditions of the contract. Negative references may be grounds for proposal disqualification.

Staffing

1. Outline the proposed staffing model you will use to manage this account. Provide details on the proposed <<ClientNameShort>> account team, including team member qualifications, education, certifications and related experience.
2. Identify the location, normal business hours (including time zone) and availability to address issues and communication methods through which <<ClientNameShort>> program coordinators will be able to reach the service team. Include details for the associated service level agreements and performance-based guarantees (e.g., response time, escalations, etc.)
3. Please identify your consultant turnover rate for the last 3 years.
4. How are your consultants trained on specific client accounts including company policies, programs and corporate culture? How is training handled when transitioning an account from one consultant to another?

Service Model

1. Provide a description of your service model including the offerings, delivery and location of key staff supporting <<ClientNameShort>>.
2. Describe any unique services or special handling you are able to provide for an officer of our company or similar VIP relocation.
3. What type of pre-decision candidate services or tools do you offer (e.g., area tours, cost of living information, etc.)?
4. Describe your relocation lump sum, flexible allowance and capped allowance programs. Provide details about each plan and address the benefits and challenges of each program.
5. What is the average number of relocations a consultant in your company will handle at one time? Is there a difference for international versus domestic relocations? If yes, please describe.
6. Are any of your supplier relationships built upon incentives or referral fees? If so, please identify and describe the nature of the financial relationship.



Policy Consulting, Policy Counseling and Education

1. Describe how you counsel and educate transferees on policy, including:
 - Availability
 - Initial and ongoing communication
 - Technology Tools
2. What is your process for documenting and managing policy exception requests from our employees?
3. What type of policy development and policy enhancement services are available to <<ClientNameShort>>'s Global Mobility team?
4. Describe how you work with clients to update their policies when there are significant changes in applicable laws, regulations or industry trends that may impact their relocation program.



Quality Assurance, Client Satisfaction and Transferee Satisfaction

1. Describe the performance metrics and procedures your company will use to measure the success of our program. Provide your client and transferee ratings from the last three years.
2. Describe the steps you take to measure performance and satisfaction throughout the relocation process, from initiation through completion. Describe the frequency and methods through which you communicate with transferees.
3. Describe any recent initiatives your company has introduced to lower client cost and/or improve service.
4. Describe your problem resolution process including your escalation procedures. Do these steps differ depending on the affected party (e.g., supplier issue, home sale issue, law suits, etc.)?
5. Provide a detailed example of a problem that was resolved using your resolution process and escalation procedures.



Supplier Selection, Supplier Network and Supplier Management

In order to ensure that <<ClientNameShort>> receives the best value for relocation services, delivery should be based on performance rather than relationships.

1. 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.).

2. Which services are performed by your own company and which by your suppliers and/or partners?
3. Would <<ClientNameShort>> be required to use your third-party suppliers?
4. Describe how you select and manage the suppliers within your network. How will you ensure that third-party suppliers are providing the most competitive price to <<ClientNameShort>>?
5. Describe the Service Level Agreements currently in place with your supplier network.
6. Describe your procedures to remove non-performing suppliers.



Expense Management / Auditing / Billing

1. Describe the funding options you offer. Outline the timelines, associated fees and any penalties and the circumstances under which <<ClientNameShort>> may incur those penalties.
2. How will your company manage the expense reimbursement process for our transferees? Describe the steps a transferee must take to receive reimbursements and the method of reimbursement.
3. What was your average turnaround time for expense reimbursements in the most recent calendar year (i.e., receipt to payment)?
4. Describe your relocation accounting services, including invoicing, payment frequency, technology dependencies, technology integration options, etc.
5. Identify and describe the controls and procedures you have in place to ensure the accuracy of expense reimbursements and invoices. How do you identify and correct discrepancies?
6. Describe your year-end process and any quarterly processes including calculating and reporting tax gross-ups.
7. In regard to payroll and tax issues, address how your organization deals with taxable versus non-taxable items, and how these will be tracked and accurately reported.
8. Describe and provide a sample invoice. What level of detail can be provided? In which format are your invoices provided?
9. Describe how you handle currency conversions.

Home Marketing / Home Sale

1. Please give a step-by-step description of how your Home Marketing Program works for a transferee.
2. To what extent are transferees allowed to select the brokers from an approved list? May transferees provide brokers for qualification and use their services?
3. Provide a step-by-step description of your Buyer Value Option (BVO) program.
4. Describe the options available for selling homes that don't qualify for BVO.
5. Describe your home inventory management process and any special systems to control costs.

Temporary Living / Home Finding / Rental Assistance

1. Describe your temporary living services program.
2. Describe your Home finding program.
3. What is typically included with your Rental Assistance program? Describe any limitations.
4. How do you select and evaluate real estate brokers?
5. What type of cost of living tools and other materials do you provide to support smart buying/renting?

Mortgage Assistance

1. Describe your mortgage counseling/assistance program.
2. Describe your equity advance program and best practices.
3. What type of reconciliation reporting and auditing do you provide for equity advances?

Household Goods (HHG)

1. Describe your Household Goods program.
2. How do you select and evaluate household goods providers?
3. What criteria do you use to select the vendor for a transferee's household goods move?

4. Describe your Domestic HHG insurance and claims process including any limitations.
5. Describe your International HHG insurance and claims process including any limitations.
6. Describe your storage arrangements for household goods.
7. Who is responsible for auditing household goods invoices? Are secondary audits performed by an outside organization? Please describe the entire process.

Destination Services

1. Describe the elements included in your Domestic Destination Service offerings.
2. Do you offer Spouse Employment Assistance Services? Describe the available services.
3. <<ClientNameShort>> is interested in destination services for international transferees moving to the United States. Describe your offerings and your ability to provide assistance in the following areas:
 - applying for a Social Security Number
 - applying for a driver's license
 - establishing utility connections
 - selecting banks and financial institutions
 - providing community orientation
4. Describe how you select your Destination Service Providers in overseas locations where <<ClientNameShort>> has office locations and indicate the number of countries where destination services can be provided?

Technology

Be prepared to fully demonstrate, through a live demonstration, the technology offered to our internal users and transferees.

Platform

1. Describe your technology platform. Describe the technology to be used by our internal users and transferees.
2. Provide a list of important features and functionality of your system.
3. Describe the online services to be provided to our HR staff supporting the programs.

4. Describe the online services to be provided to our transferees in support of their relocation.
5. Identify how technology supports your relocation accounting services. Describe the tools used to supply detailed information to <<ClientNameShort>> and any system requirements with which <<ClientNameShort>> will be required to comply.
6. Do you offer mobile applications? Describe the platform(s) to be used by transferees to access information and submit expense claims.

Licensing

7. Is there a licensing fee associated with use of your company's software/system required to utilize your services?

Security and Disaster Recovery

8. Describe the security features of your technology platform and how our employee and company confidential data will be protected (e.g., firewalls, security monitoring, virus protection)?
9. Describe your disaster recovery/ business continuity plan and related/ back-up systems, processes and locations that support your overall plan.
10. Describe your records retention policies and practices regarding <<ClientNameShort>>'s employee files.



Global Services and International Assignment Compensation

1. What global services does your company offer? Please describe.
2. Describe the international HHG insurance claims process.
3. Describe your international storage arrangements for household goods?
4. What is the average number of international relocations a counselor in your company will handle at one time? Is there a difference for international versus domestic relocations? If yes, please describe.
5. Describe your Visa and Immigration Services.
6. Please detail the language and cross-cultural training your company offers.

7. Describe the process for ensuring that all applicable immigration/customs documentation is received in a timely manner.
8. What support services do you consider to be critical in terms of repatriation and why?
9. What services do you offer in the area of International Assignment Compensation services?
10. Are your global compensation services supported on the same single platform?
11. Do you have in-house expertise for international payroll and compensation administration?
12. List the countries for which your company can report on the taxable status.
13. Explain how you calculate foreign allowances and expatriate pay packages.
14. Do you offer balance sheet payments to assignees in either home or host currency?

Reporting

1. Describe your online reporting capabilities.
2. Provide sample reports for each of the items discussed above.

Implementation

1. Describe your implementation process including a detailed timeline, roles and responsibilities and assumptions about <<ClientNameShort>>'s involvement in the process.
2. Identify and provide resumes for your key implementation personnel including:
 - Team Lead / Project Manager
 - Account Management/Staff supporting <<ClientNameShort>> account team
3. Describe how your team will transition existing files. Describe the recommended takeover strategy.



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