

REQUEST FOR PROPOSAL

U.S. DOMESTIC AND GLOBAL
MOBILITY SERVICES

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PROVIDER INFORMATION/OVERVIEW

1. Please provide a brief history of your firm, including number of years in business, number of employees, number of locations/offices, and most recent financial statement. Is your firm owned by a parent company?

2. Provide a high-level overview of your complete services offerings both domestic and international services.

3. Describe any affiliations, exclusive arrangements, ownership interests, or other relationships that your company has with any other organization providing relocation related services (real estate brokerages, appraisers, mortgage companies, van lines, temporary housing vendors, etc.).

4. Is your company “for sale” or otherwise anticipating, currently undergoing, or has completed, in the last 24 months, a merger, acquisition, divestiture, or other relationship? If so, please explain.

5. Indicate the length of time your firm has been in the business of providing relocation services as detailed in this RFP.

6. List and describe three (3) competitive advantages your company has over your competition.

7. Please provide three current client references for which you provide outsourced domestic relocation services. Include client name, contact name and title, street and email addresses, and telephone number.

Client Name	
Contact Name	
Contact Title	
Contact Address	
Contact Email	
Contact Phone	

Client Name	
Contact Name	
Contact Title	
Contact Address	
Contact Email	
Contact Phone	

Client Name	
Contact Name	
Contact Title	
Contact Address	
Contact Email	
Contact Phone	

ACCOUNT MANAGEMENT AND SERVICE DELIVERY

8. Describe your service delivery structure, including management of the account and the roles/responsibilities of the individuals assigned.
9. Do you designate a single point of contact for all services to work with each employee throughout their move? If not, describe your team's approach to providing services during the move.
10. What are the standard working hours for your relocation counselors? Is your staff available on evenings and weekends? If so, explain the methods by which your staff can be reached.
11. How will you ensure consistency and timeliness of administration, counseling, application of benefits, etc., across the globe and its many time zones?
12. Discuss your problem resolution process and escalation procedures.
13. How do you keep corporate clients abreast of significant developments in the industry?
14. How often do you meet with clients? Who regularly attends these meetings?
15. Please describe one of your most challenging international relocations/assignments and explain how you supported the assignment.

QUALITY ASSURANCE

16. Please provide information on how your quality control programs are administered and evaluated.
17. Describe efforts your company is making to raise current standards or performance within the industry.
18. How has your quality assurance methodology reduced clients' overall program costs?
19. What has been your transferee satisfaction rate the past two years?

	2017	2016
Satisfaction Rate		
Response Rate		

20. Describe how your company measures and monitors client satisfaction levels. How do you use this feedback?
21. What is the client retention rate for relocation management services for the last five years?
22. Describe the performance metrics and procedures your company will use to measure the success of your program.

SUPPLIER NETWORK

23. Briefly outline your supplier network and explain how it benefits your clients.
24. Do you have an ownership in, or are you owned by, any of the partners that you utilize?
25. As the delivery of your service to our international assignees and families depends in part upon your use of third-party suppliers, please list by category the types of third-party suppliers you use.
26. What is the benefit of using your supplier network? Are you willing to adding any suppliers that we have long-term relationships with to your network?
27. Are there any membership fees, licensing, or special fees required to be an approved partner in your network?
28. What is the selection criteria you use when accepting suppliers into the network? Do you also work with client directed suppliers?
29. How do you communicate and share information with suppliers?
30. What are the service standards in place for your service providers? How are they monitored and evaluated?

SERVICE OFFERINGS

31. How long (in years) have you been offering domestic relocation services? International services?
32. Describe the lifecycle of a domestic move and describe the different touchpoints throughout.
33. Describe the different phases of an international assignment and the types of services you offer in each phase.

34. Describe your service capabilities for international mobility outside of the United States?
35. Describe your company's strengths in both domestic relocations and international relocations/assignments.
36. What percentage of your business pertains to International vs U.S. Domestic?
37. Describe how you will counsel employees about our specific policies.
38. Describe how you propose to deliver Home Sale (Appraised Value/Guaranteed Offer, Amended Value, Buyer Value Option) and related departure services for homeowners.
39. Describe your property valuation process.
40. Describe your strategies for maximizing the employee's success in generating an independent sale.
41. Describe your home marketing assistance services. What differentiates your company in preventing homes from entering inventory?
42. Describe your inventory management process and any special programs to control costs. Do you charge an additional fee for properties that enter inventory? If so, what is the fee?
43. What type of policy consulting services do you offer? Is there an additional fee for these services and if so, what is the fee and how is it charged?
44. Describe your home-finding capabilities including, temporary living, rental and home purchase.
45. How do you select temp housing? Do you have partnerships with corporate housing facilities? How do you control costs between providers?
46. Provide a "sample packet" of the materials you typically provide to customers as they prepare for a home finding trip (Ex: Demographic information, resources, realtor services, schools, civic amenities, crime statistics, etc.)
47. What type of cost of living tools and other materials do you provide to support smart buying/renting?
48. Do you offer mortgage assistance? If so, who are your preferred providers?

49. What procedures do you have in place to verify an employee's need for equity before contract (equity advance)?
50. What other destination services do you offer?
51. What type of options do you provide for arranging relocation travel: booked by your Company, the client Company books direct or the employee books direct and submits for reimbursement?
52. Describe the types of cost estimation tools you offer and additional costs, if any.
53. Describe your Household Goods Move Management program and any options you provide to your clients that drives additional value and controls cost.
54. What criteria do you use to select the mover for an employee's household goods move?
55. How do you select and evaluate household goods providers?
56. Describe your HHG insurance and claims process. How many days do you average in turning around claims?
57. Who is responsible for auditing household goods invoices? Do you have secondary audits performed by an outside organization?
58. Describe your international move management process (freight forwarding). Do you also audit international invoices?

TECHNOLOGY AND REPORTING

59. Describe the software system you use to manage the relocation process? Is it proprietary or an off the shelf system? Describe its integration capabilities and any additional costs associated with integration for the client.
60. Discuss the reporting options your company offers, and provide examples of reports. What formats are used (Excel, PDF, etc.)? How often are they provided or can they be run ad hoc?
61. What types of online service tools that would be provided to our corporate administrators and staff supporting our programs?
62. What are the online service tools that would be provided to our transferees in support of their relocation event?

63. What measures does your organization take to ensure the confidentiality of your client's data (e.g., confidentiality agreements with employees, third parties, network segregation, data segregation etc.)?
64. Describe your security measures for data transmission, including your security strategy and information protection procedures (security analysis and architecture).

IMPLEMENTATION

65. Describe your recommended implementation plan and timeline for a 30-60-90-day transition period. IS this enough time to fully implement a global program?
66. What resources from the client would be involved in the transition?
67. Would a dedicated transition team be assigned? Will this team be different than the delivery team?
68. Describe takeover of existing files. What takeover strategy is recommended? Are there fees charged for transition files? If so, describe how the fees are determined.

FINANCIAL ADMINISTRATION

69. Summarize your expense management service and the procedures you follow to process, track, and gross up employee and vendor relocation payments and reimbursements.
70. What controls and procedures do you have in place to ensure the accuracy of expense reimbursements?
71. Describe your process for tracking and reporting taxable vs. non-taxable relocation expenses.
72. Can employees submit expenses online? If so, what is the turnaround time for them to get reimbursed? Can they be paid in multiple currencies?
73. Describe your year-end process. What information is made available to transferees and to client teams?
74. What is your W2c percentage rate for your current clients in 2016 and 2017?
75. What is your frequency of billing and what level of detail can be provided?

76. Describe your ability to tailor invoices to accommodate multiple business units/divisions, relocation policy benefits, and different payment timing.
77. Describe billing terms and funding options.
78. Describe your international accounting services and support.
79. What kind of support/reporting/orientation would you provide to in-country HR and payroll staff?
80. Describe how you propose to deliver global financial administration, including but not limited to:
- Assignment cost estimates - initial and updates (upon request and annual review)
 - Budget to Actual Reconciliations
 - Employee/Assignee Support - from Initial Counseling throughout assignment and for repatriation/localization support
 - Compensation Balance Sheets - Initial and updates upon request
 - Annual compensation collection and Tax Provider coordination
 - Tax Support: Tax and Tax Equalization payments; Refund and TEQ repayments including tracking and reporting
81. Describe the flexibility you offer in scheduling payroll passes with clients.
82. Describe your experience in providing international payroll support including home/host split payroll, shadow payroll and comp data gathering from multiple payrolls.
83. Can you provide data/compensation collection services? If so, is it supported on the same single platform? Please describe this service.
84. What is your biggest challenge in Expatriate Compensation and how do you address it?
85. Describe your interactions with tax providers on behalf of your clients and their employees.
86. Can you make tax payments to a taxing authority, both within the US or overseas?

VALUE/INNOVATION

87. What other value-added services do you provide?

88. Describe any recent initiatives your company has taken to manage or reduce costs.

PRICING

89. Describe your pricing structure and administrative fees, including any penalty charges (such as charges for relocations initiated but not accepted by employee). Do you offer a bundled fee package for homeowners, renters, and lump sums?

90. What additional compliance fees are charged if a referral fee from a broker or real estate agent is not received?

91. What is your average markup on supplier invoices? What services would you invoice as pass through costs?