

A large, stylized magnifying glass graphic in a vibrant blue color, centered on the page. The handle of the magnifying glass extends downwards and to the right. The lens of the magnifying glass is positioned behind the title text.

SAMPLE RELOCATION RFP QUESTIONS

The following are questions you can consider when constructing a relocation request for proposal (RFP).

In addition to the question, we provide the context for why the question is important, as well as things to consider when reviewing responses. You can use these questions to form the basis for your RFP and build in other questions you deem appropriate, based on your program.



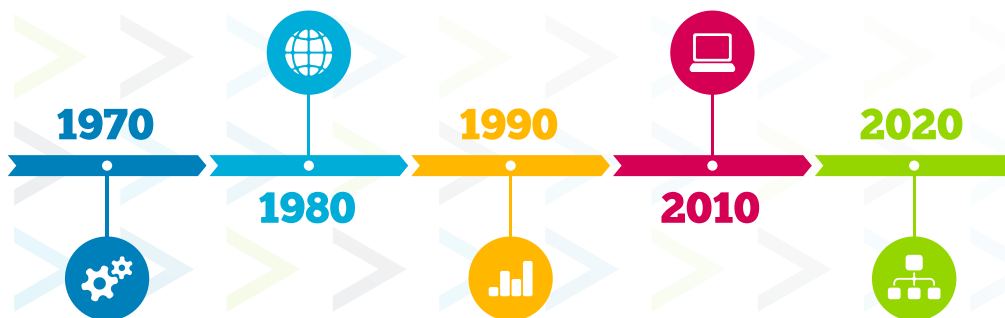
COMPANY HISTORY

Provide a brief history of your company, including its original line of business and how businesses or services were added over time. Also include any acquisitions or divestitures and the approximate dates they occurred.



KNOWING A BRIEF HISTORY OF THE RMC PROVIDES INSIGHT INTO THE CORE OF THE COMPANY AND ITS CULTURE.

For example, an RMC that began as a household goods company or real estate firm may still have firm roots in those businesses, which can either enhance or detract from its role as an RMC on behalf of the client.



INDEPENDENCE

Do you own, or are you owned by, any companies related to the relocation industry—either wholly or in part? Describe the relationship (ownership stake, etc.) and length of time this relationship has been in place.



AN RMC'S ABILITY TO INDEPENDENTLY SELECT SUPPLIERS IS AN IMPORTANT PART OF ENSURING THAT YOUR EMPLOYEES RECEIVE THE BEST SERVICE AT THE BEST PRICE.

Cross-ownership obligations can cloud objectivity and result in an RMC making supplier selections based on obligation or political gain, rather than through an objective, unbiased process.

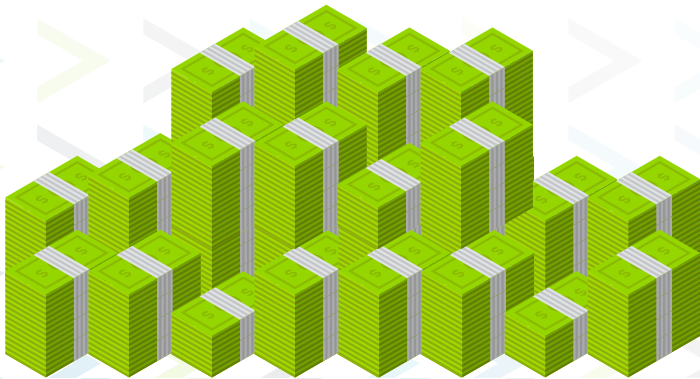
FINANCIAL STABILITY

Provide a statement regarding the financial stability of your company, which includes your source of funds for operating the company and funding relocation services on behalf of your clients.



RMCS OFTEN USE THEIR FUNDS TO PAY FOR EMPLOYEE RELOCATION EXPENSES OR EMPLOYEE HOME EQUITY, REQUIRING ACCESS TO LARGE AMOUNTS OF CASH ON BEHALF OF THEIR CLIENTS.

Understand how you want to fund your relocation program and ensure that the RMC has adequate funds.



OFFICE LOCATIONS AND SERVICE AREAS

List your office locations, including the services or function of each office. Indicate which office(s) our business would be managed from.



RMCS HAVE DIFFERENT OPERATING STRUCTURES BASED ON WHERE THEIR OFFICES ARE LOCATED.

Knowing how they are structured and where your business will be managed can help you develop a comfort level for the RMC's capabilities, or lead to more questions about how they will manage your business.



SUPPLIER SELECTION AND NETWORKS

Do you charge suppliers membership or other fees as a requirement for being in your supplier network? If so, list the suppliers involved and describe the fees that are charged. Are there any suppliers to which you have an obligation to provide business in any way? If so, list those suppliers and describe the nature of the relationship.



BUILDING A SUPPLIER NETWORK SHOULD BE BASED ON THE SUPPLIER'S ABILITY TO PERFORM, NOT THEIR WILLINGNESS OR ABILITY TO "BUY" THE BUSINESS THROUGH MEMBERSHIP FEES.

The supplier selection and management process should be arms-length and based on performance. Be certain to understand the business relationships between the RMC and its suppliers – and determine if the relationships meet your standards of objectivity.

CLIENT AND EMPLOYEE TECHNOLOGY

Describe your technology for clients and transferring employees. Be prepared to fully demonstrate, through a live demonstration, the technology that is offered to our internal contacts and their relocating employees.



EMPLOYEES RELY ON TECHNOLOGY TO MANAGE KEY ASPECTS OF THEIR LIVES, SO THE TECHNOLOGY OFFERED BY AN RMC IS BECOMING A KEY DIFFERENTIATING FACTOR.

Most important, employees prefer to use mobile apps for information and transactions. The only way to truly understand what each RMC offers in terms of technology is to experience a live, in-depth demo of that technology. An RMC without a mobile app is an indication that they do not invest in technology. A live demo allows you to experience the actual product and see how it works. This can be done as a separate presentation by down-selected RMCs, and you should allow adequate time (at least one hour) to experience the technology. Also, ask the RMC for a list of important features and functionality of their online systems. This should be a live demonstration of actual demo websites – not screen shots.

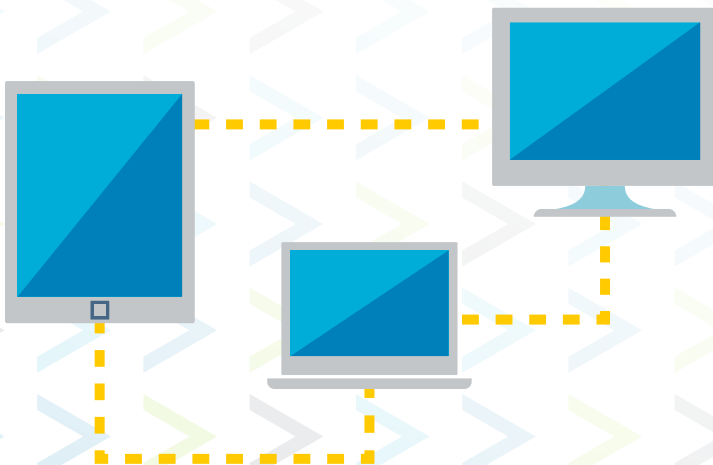
TECHNOLOGY INTEGRATION WITH SUPPLIERS

How do you communicate and share information with suppliers?



LEARNING ABOUT HOW THE RMC COMMUNICATES WITH SUPPLIERS IS A GOOD INDICATOR OF ITS INVESTMENT IN TECHNOLOGY AND DEDICATION TO PARTNERING WITH SUPPLIERS AND PROVIDING FASTER SERVICE TO YOUR EMPLOYEES.

Look for companies that integrate applicable employee information to send to suppliers, and systems that allow suppliers to upload reports and share communications via secure technology.



EXPENSE REIMBURSEMENT

How does your company manage the expense reimbursement process for our employees? Describe the steps the employee must take to receive reimbursements, the method of reimbursement (check, bank deposit, etc.), and the turnaround time.



RECEIVING TIMELY EXPENSE REIMBURSEMENT IS VERY IMPORTANT TO EMPLOYEES.

Allowing employees to quickly complete and send expense requests saves valuable time. Understanding how the process works will provide insight into the sophistication of the RMC. Look for technology that allows the employee to submit expenses via their mobile device by snapping a photo of a receipt as opposed to copying receipts, attaching them to paper, completing a report, and faxing or mailing.

EXCEPTION MANAGEMENT AND REPORTING

Describe the steps and any technology used to support the policy exception management process, and the type of reporting you provide to track and categorize program exceptions.



PROGRESSIVE RMCS WILL USE TECHNOLOGY TO REPORT EXCEPTION REQUESTS AND POTENTIAL COSTS TO THE CLIENT, ALLOWING THEM TO RESPOND VIA THEIR CLIENT PORTAL TO EXPEDITE THE PROCESS AND RECORD RESULTS.

Exception management is a key component of cost control in a relocation program. Look for companies that provide exception reporting that not only records the nature and cost of the exception, but also categorizes the exception as “additional cost,” “cost neutral,” or “cost savings.” Not all exceptions result in additional cost, and the client should be able to identify all exception types to ensure that policies are effective.

CONSULTANT WORKLOAD MANAGEMENT

Describe the standards and criteria you use to measure consultant workload to ensure that caseloads are manageable.



MORE SOPHISTICATED RMCS WILL UNDERSTAND THAT THE “NUMBER OF FILES” IN A CASELOAD DOES NOT ACCURATELY REFLECT THE WORKLOAD OF ITS EMPLOYEES.

Look for RMCs that use a weighted service workload data based on the number and types of services the consultant is delivering. This ensures more balanced caseload management and higher-quality service.

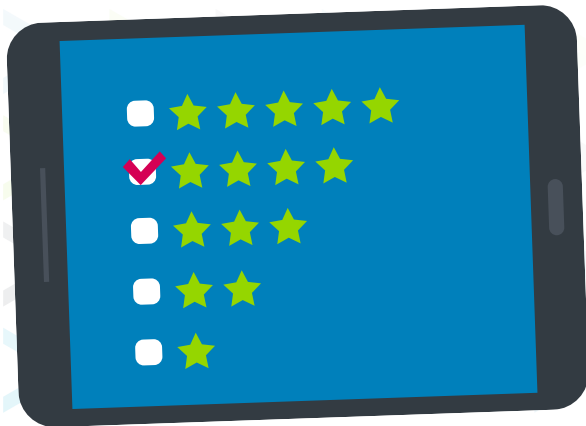


CLIENT SATISFACTION SURVEYS

Describe any formal client satisfaction surveys that are conducted by your company, and highlights of the most recent survey.



In addition to ongoing “status checks” by the RMC’s client relations manager, check to see if the RMC conducts formal surveys to learn about client needs, changes in the industry, or other information that demonstrates the RMC’s desire to continue enhancing its services to clients and their employees.



EMPLOYEE SATISFACTION

How and when do you measure employee satisfaction for your company and its suppliers?
How do you handle employee complaints or service issues?



THE BEST RMCS MEASURE PERFORMANCE AND SATISFACTION MULTIPLE TIMES AND IN VARIOUS WAYS DURING (NOT AFTER) THE RELOCATION.

Look for companies that make random service calls to employees during the move, allow employees to complete surveys electronically at multiple times during the process, review and react to surveys on a weekly basis, and provide contact and management information at the beginning of the process as key indicators of how serious the RMC is about service.

AWARDS AND RECOGNITION

List any awards or recognition your company has received over the last three years.



RMCs that innovate and drive the industry forward will invariably be recognized within and outside the industry.



HOMESALE PROCESSES

Describe the process steps you use to complete a homesale BVO or AV sale from the time the offer is received to the signing of the RMC contract with the employee. Describe any technology used to support this process.



THE RECEIPT OF AN AV OR BVO OFFER ON AN EMPLOYEE'S HOME IS A CRITICAL TIME IN THE LIFE OF A RELOCATION.

A quick response by the RMC is critical to not losing or agitating the buyer. Having the employee sign related sale documents quickly is important. Look for RMCs that use electronic signature or other technology to expedite the legal signing of sale documents with your employee.

COST MANAGEMENT PRACTICES

Describe any practices you use to control the costs we incur in relocating our employees. Describe any recent initiatives your company has taken to manage or reduce costs.



RMCS SHOULD VIEW THEMSELVES AS GUARDIANS OF THEIR CLIENTS' RELOCATION DOLLARS.

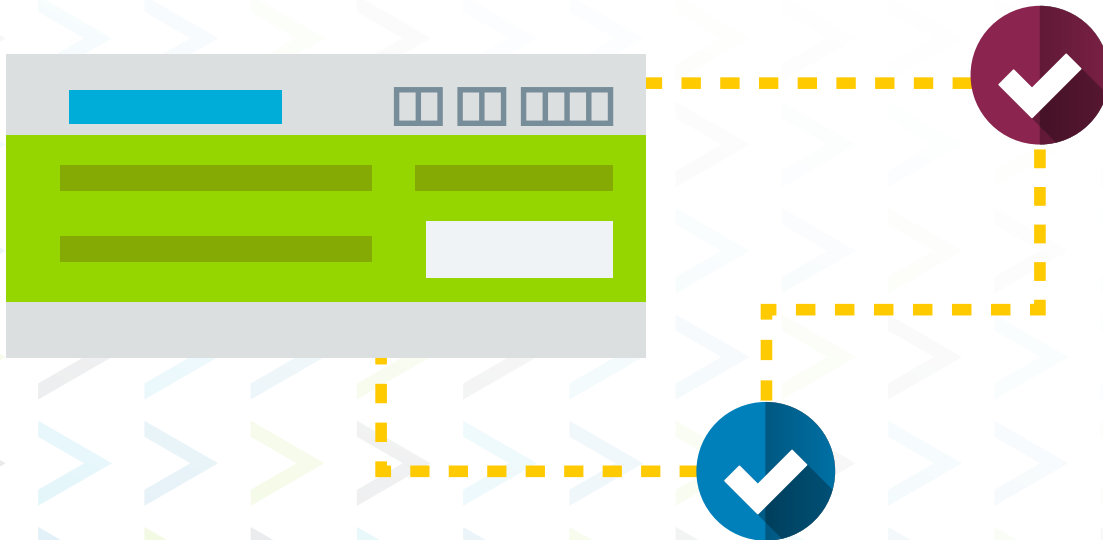
Look for solid practices in managing costs, such as ongoing supplier cost negotiations. Also look for innovative ways the RMC has worked to reduce costs through new programs or other methods.

PAYROLL INTEGRATION

Describe your capabilities to integrate with our payroll system for tax reporting and other information-sharing purposes.



Be prepared to provide the payroll or HRIS used by your company, so the RMC can confirm its capabilities to share information electronically to reduce work needed and improve accuracy.



SUPPLIER REVENUE SHARE

List the suppliers you receive revenue from and the formula or amount that you receive.



RMCS SHOULD BE FULLY TRANSPARENT IN HOW THEY EARN THEIR REVENUE.

Since much of the revenue earned by RMCs is from suppliers, and not the corporation, it is important to understand which services drive revenue to the RMC. This helps you understand the value of your business to the RMC. For example, homeowners who will sell and buy real estate through the program are more valuable to the RMC than renters, where there is little opportunity to earn referral fees.

GLOBAL SERVICE FOOTPRINT AND AVAILABILITY

Confirm that you provide the full breadth of services in all global locations we do business in as listed in this RFP. Also describe the on-the-ground support you provide in the destination location. Who manages ongoing issues for the employee in the destination location if there is an immediate need? Where is that person located? How are time zone differences managed?



MOST RMCS USE EMPLOYEE DESTINATION SERVICES FIRMS TO PROVIDE HOME FINDING OR SETTLING-IN SERVICES TO THE EMPLOYEE IN THE NEW LOCATION.

However, these services are limited in scope and do not provide on-the-ground local assistance for needs or issue resolution that are not specifically related to the destination services providers core services. This can cause a service gap when the employee has a specific need about other relocation issues.

NEXT STEPS

These topics cover some of the main areas that can help you discern the differences between RMCs and lead you to a better conclusion.

Compare this list of topics to your own and add additional topics that may be of interest to your organization. Taking a strategic approach that focuses on the key elements of a successful partnership with the selected RMC will pay dividends in cost management and the satisfaction levels of your employees in the future.

To learn more, visit www.nucompass.com.

