



If you're responsible for managing a bid for relocation services, you probably know the basic steps: develop a questionnaire, send it out, score the results, and schedule a site visit for top contenders. But if you want to ensure that your RFP process, and your ultimate mobility contract, really meets company objectives, a few key steps can save you time and money. We take a look at five of the most common pitfalls in planning an RFP from the perspective of experts at companies who have managed many bids.

## **1. FAILURE TO UNDERSTAND TOTAL COMPANY NEEDS.**

Relocation programs serve your company in ways that may not be immediately obvious. Failing to represent the needs of your total organization can lead to an inefficient and unsuccessful RFP process. Different divisions face challenges peculiar to their businesses, locations, and industries. Recruiters and hiring managers compete for talent based on different factors. International mobility challenges differ by country and region. Make sure you do your research to make sure you are balancing your company's overall needs.

## **2. NOT PERFORMING DUE DILIGENCE ON BIDDERS.**

If you don't do your research on potential suppliers and their capabilities, you run the risk of overlooking valid candidates or judging candidates on insufficient data. In post-selection interviews, companies often comment that their initial impression of a bidder based on size, reputation, or marketing, was off target. Consider an RFI stage that helps you qualify and limit the number of bidders, but make sure that you don't make the RFP stage a duplicate of the RFI.

On the flip side, make sure vendors have an opportunity to learn about your company and its mobility objectives before issuing an RFP. Ask yourself how a vendor with no prior knowledge of your company can craft a customized response that answers your needs fully and creatively.

## **3. SETTING AN UNREALISTIC TIMETABLE OR BUDGET FOR THE RFP PROCESS.**

Not allowing vendors adequate time to fully complete each phase of the RFP process may compromise the quality of the proposals you receive, leading to less creative and customized response. This may also add time needed to clarify inadequate responses and engage in back and forth Q&A. Take into account a customary round of vendor questions that may take time to answer.

Also, begin the RFP process with a firm idea of what it will cost the company. The cost is more than just financial, but extends to the commitment that is needed from a number of people in your organization to contribute time and energy to an effort that is not part of their regular jobs.

## **4. UNDERESTIMATING THE APPROVAL PROCESS.**

Not planning ahead for executive approval of your plan and choice of vendor can add unnecessary time to the RFP timeline. There may be other factors at play in your company, for instance, senior executives in your company may already be predisposed to work with a certain vendor as a result of past experience, advice from their peers, or even business relationships with the vendor's greater organization. Identifying and understanding these potential influences early and preparing management to consider your recommendation may pay off in the long run.

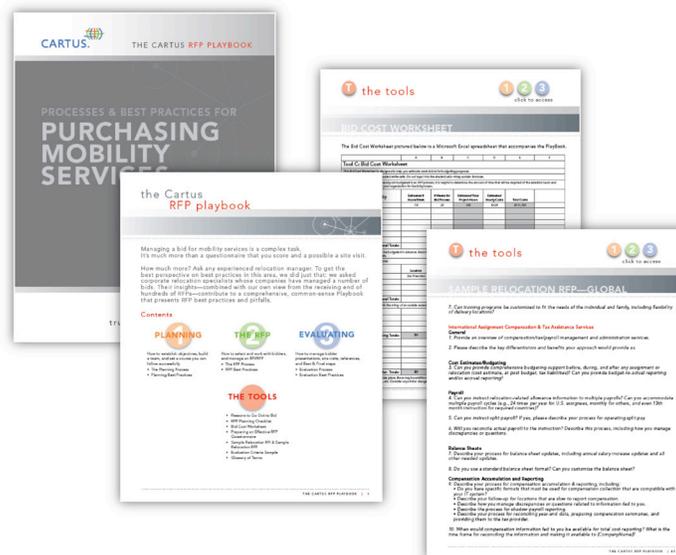
# Five Pitfalls to Avoid When Planning Your Next Relocation RFP

Also, make sure you build a knowledgeable and committed team from all affected functional areas (finance, procurement, HR, etc.) to drive a better decision. Consider the areas of expertise, ability to commit to a long project, and the personalities of the people you want to engage.

## 5. DEVELOPING A QUESTIONNAIRE THAT FOCUSES ON FEE ALONE.

Prioritize your objectives. Even if your main goal is cost reduction, entering into a bid focused only on the lowest bottom line price, and not with the intention of improving overall value, can be counterproductive. While the competitive bid process is designed to make vendors sharpen their pencils, asking vendors to do more for a lower fee in the long term may erode the value of your mobility program. Focus on ways to reduce total program costs and the potential for ongoing savings that are often equal to, or greater than, the vendor's total fee.

For more information on processes and best practices for purchasing mobility services, request a copy of the comprehensive [Cartus RFP Playbook](#).



Click on the images above to request a copy of the Cartus RFP Playbook

The *Cartus RFP Playbook* contains best practices and guidance for planning, managing, and evaluating an RFP for mobility services. The RFP Playbook is also supplemented by samples of a *Bid Cost Worksheet* and RFP questions. If you have additional questions concerning the Playbook, please email us at [trustedguidance@cartus.com](mailto:trustedguidance@cartus.com).

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