

# Lessons Learned In Conducting Mobility RFP's

As companies increasingly focus on cost control and good governance they are reviewing contracts and partner services more regularly than in the past. At Naspers we conducted five RFP's in 2016 to select global partners for the following services: - relocation, immigration, expatriate data, technology and expatriate payroll outsourcing.

The RFP process can be time consuming and complex, and this article seeks to provide an overview of the key areas to consider when undertaking a mobility RFP. It is based upon the successful Naspers 2016 RFP process and general industry good practice.

## The Planning Process

The Planning Process is one of the most critical as it will ultimately shape your final outcome. Planning should include all stakeholders within mobility, your procurement team and the wider business (whose employees will ultimately utilise the services) from your procurement to financial colleagues. This will ensure alignment on objectives, timescales and time commitment from all, which is crucial. When planning the overall deliverables and timelines remember providers may not be able to start their pricing until questions are answered so allow time for the provider's final response.

Clearly defining the objectives for your RFP and each stage of the process is essential and typically includes the following:

- Agreeing the RFP questions, pricing, service specifications
- Allowing time for questions and answers
- Evaluation and scoring approach for every evaluator to follow
- Face to face meetings
- Final selection process
- Contracting
- Implementation with handover from previous provider
- Go Live!

Please refer to the visual showing the timeline of events that shows the key milestones in the successful Naspers RFP process.

How can you save time and ensure you don't end up selecting providers to your RFP that don't meet certain key requirements?

Be open with information on the present state of your programme and your company's objectives. Share policies as this will allow respondents to understand your company culture and approach to mobility. Include details of your demographics and the number of relocations per annum and if possible by policy type, home and host location etc. All the information that you share will help respondents to tailor their response including pricing to your needs. They will also be able to start providing feedback on your policy and programme, whilst understanding where noise may be coming from, for instance, if you have remote or challenging locations. Ultimately, the more you share the higher the quality of responses will be. This will make the evaluation of responses easier whilst increasing your chance of making the right provider selection!

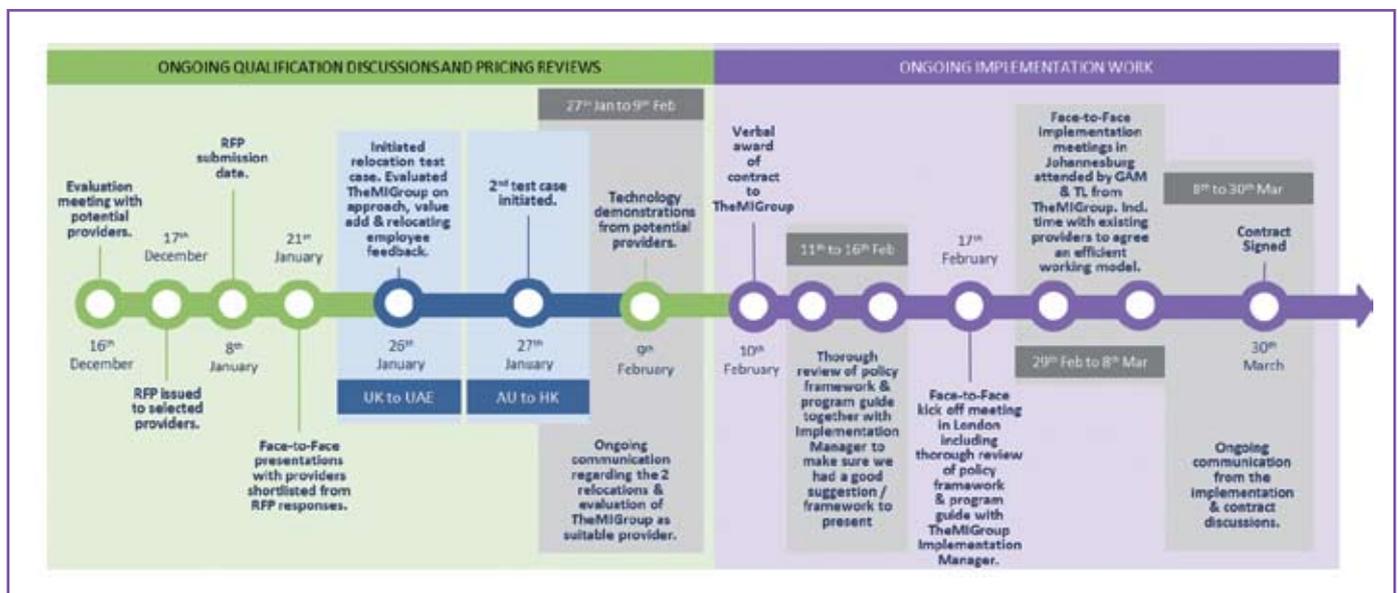
## Naspers Challenges During The RFP

- Timescales and availability of Naspers Resources
- Managing the day to day Mobility programme
- Conducting multiple RFP's at the same time
- Contract negotiations.

Who you invite to respond and why is another key area to spend time on to achieve a positive outcome. Obviously you need a quality and cost-effective solution from your chosen provider, but importantly you need a long-term partnership that will truly deliver value to your programme. Spend time up front to review potential providers and this investment of time will pay dividends. Look for a good cultural fit and evaluate if they have experience in your type of programme. Do they have knowledge of overcoming challenges you face in your industry and locations?

If your company has very strict criteria that a provider must meet such as data privacy, limitation of liability etc., then consider issuing a RFI prior to the RFP. This should just include key questions relating to the criteria a provider must meet to work with your company. This will ensure you only invite providers to the RFP that you can ultimately contract and work with.

Take time to compose the RFP request. Be clear with what you require and if you need a yes or no answer make it so a yes or no must be selected. Then allow for an expanded response so the respondent can provide further detail



that may be of interest to you. Take a moment to look at where your programme is but where you may need to move to in the coming years. What could your programme look like in 3 – 5 years' time? You don't want to contract with a provider who doesn't fit with what your future requirements may be. So include questions that relate to what your future requirements may be to ensure you select a provider who can support your programmes future state and evolution. Technology for the global mobility team and relocating employees is typically a key element of a RFP. Take time to ask questions that truly test the respondents on how they will not only meet your requirements but how their technology adds value to their clients.

Ensure you provide detailed service specifications and clear pricing templates which every respondent will complete as the majority of respondents questions typically relate to pricing or lack of detail. Consider including specific scenarios based on your common home and host locations to be priced as this can be helpful when comparing costs. This detailed approach will ensure you receive pricing based upon your requirements, otherwise you may find very different approaches to pricing being used. This then leads to a lengthy and difficult evaluation period as you try to compare non like for like pricing.

Some companies prefer to use their own contract terms rather than using one provided by a contractor. If this is important to your company include a copy of the contract terms with the RFP and make it a condition of participation.

### Learning's From The Naspers RFP

- Carefully pre-plan the whole RFP strategy
- Communicate objectives clearly with potential partners
- Advise stakeholders and customers
- RFP – set out requirements, timelines, etc.
- Areas that took longer than anticipated
  - Pricing
  - Clarifying services including technology
  - Contracting
- Areas that were easier than planned
  - Implementation.

Face to face presentations with selected potential providers is a key element of the process. Take time to communicate with your internal stakeholders on what they want to achieve from these presentations. Provide guidance to potential providers on what you need to be covered in the presentations but also leave time for them to tell you where they believe they can add value to your programme and how. Consider asking for live demos of technology, but allow time and remember providers will need access to the internet. If you have limited time for presentations consider follow-up technology presentations at a later date just for those companies you select for final consideration. Many companies

also schedule a visit to the final selected provider's office to meet the wider team and get a true feel for the company prior to a final decision. This is becoming more typical and should be seriously considered as some companies have reversed their initial ratings of potential providers following such visits.

### What Worked Well For Naspers!

- Fast pace kept momentum going
- Achieved our objective of getting new partners in place quickly and efficiently
- Interaction between chosen partner to work together efficiently for Naspers benefit.

Communication is key and do communicate any updates or changes to the RFP schedule ASAP. The more you can help respondents to pre-plan for what commitments you need from them the better the outcome will be for you. This would include providing dates for when face to face meetings are scheduled to take place when you issue the RFP.

### Naspers Contracting & Implementation Check List

- Agreeing terms
- Data privacy
- Technology compliance
- Implementation
  - Agree a road map
  - Actions, responsibilities, timelines
  - Ensure new partner takes on the administration
- Workshop – Invest time in the new relationship.

Implementation is critical and it is recommended that you allow a section of questions to cover this area in your RFP request. Then during presentations ask providers to explain how they would implement your programme, what resources are required from your company and timescales. Be careful if a provider is suggesting they can implement your programme quicker than others. It may be that they lack true experience and don't fully understand the level of required work to successfully implement and go live with a programme of your scope. A rushed implementation can achieve positive results but you have to be very careful as a bad implementation has far reaching negative consequences for mobility, your wider stakeholders and of course relocating employees.

In summary the following are key points to consider when planning a successful RFP.

### Do

- Take time to plan the end to end process
- Consider the use of an RFI
- Meet and evaluate providers prior to the RFP
- Have potential respondents sign a Non-Disclosure Agreement
- Share programme and policy information
- Allow time for all stakeholders' actions, including the providers!

### Don't

- Rush into an RFP hoping to find your way as you move through the process
  - Ask for pricing without clear service specifications
  - Be tempted to speed through the process.
- The work that you put into the planning phase will be rewarded several times over as you move through the RFP process and we wish you a successful RFP experience.



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