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BTN Academy: Selecting a travel management company and online booking tool

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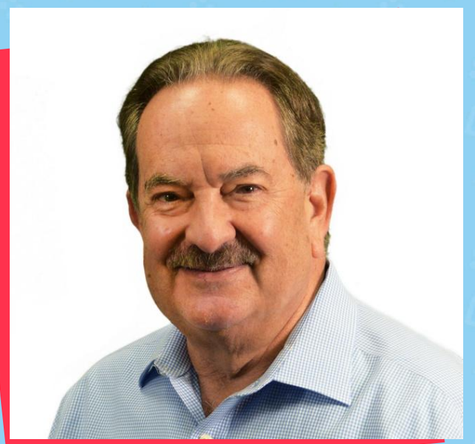

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TMC and OBT Sourcing : Procurement Fundamentals: 5 Steps

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TMC

- What services do you want your TMC to provide?
- Gathering data for a successful TMC bid
- One or multiple TMCs?
- Narrowing the candidate field
- TMC fee types
- Preparing and sending the RFP
- How to evaluate, negotiate and contract?
- How to implement and measure performance?

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OBT

- Making the business case for an OBT
- Different types of OBT supplier
    - e.g. GDS-owned, expense tool-owned, TMC in-house tool etc.
- Where OBT content is sourced from?
- OBT selection criteria
- How to check what content an OBT can really deliver?
- Contract directly with OBT supplier or through TMC reseller agreement
- What to put in the contract?
- How to prepare a successful implementation? e.g. tool configuration
- How to optimise online adoption and measure successful tool usage?

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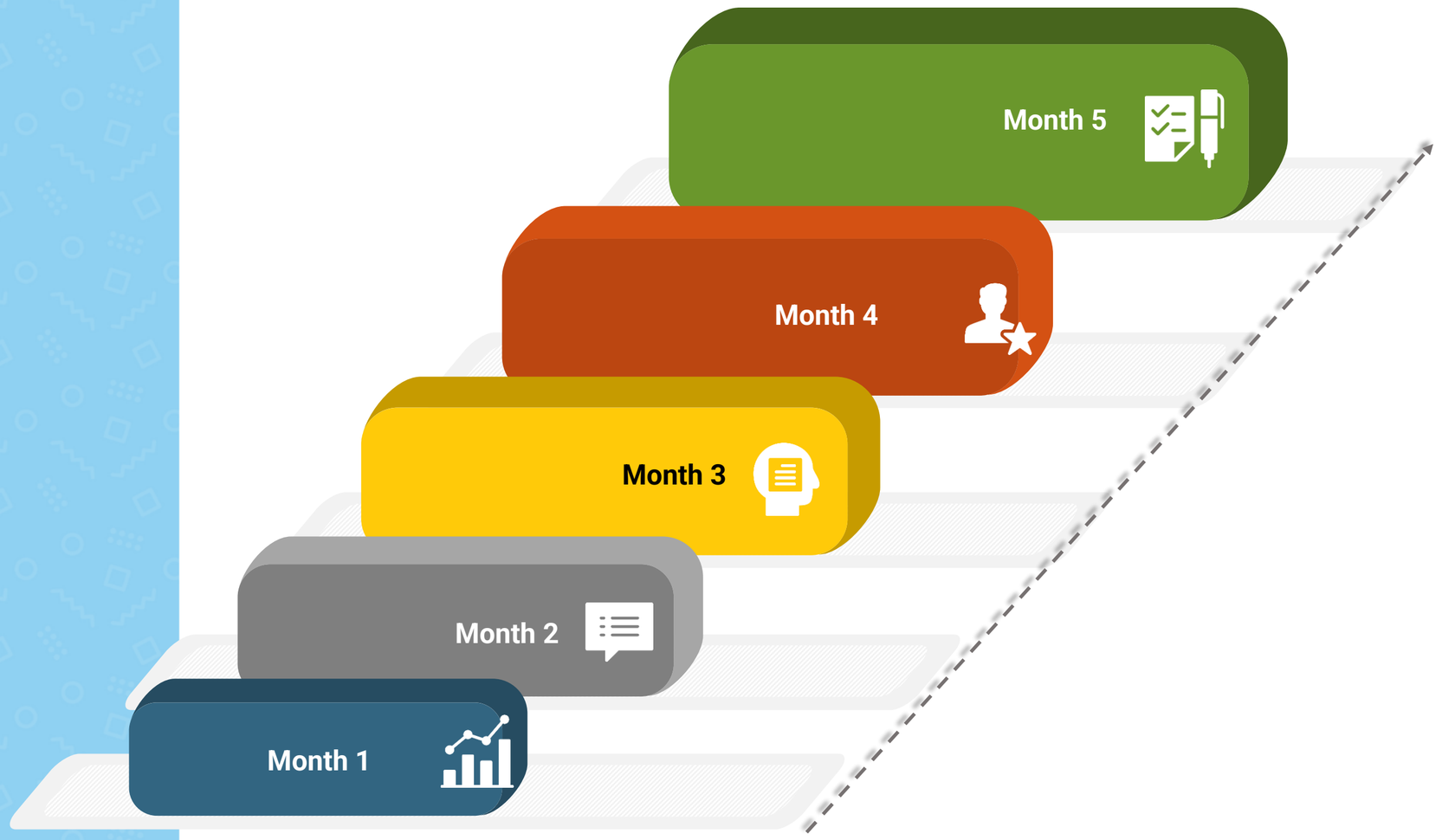
TMC RFP
Timeline



SUPPLIER AUDITS
Audit airfare and hotel discounts. Survey travellers. Review OBT configuration

IMPLEMENTATION/DE-IMPLEMENTATION
Communication plan, incumbent transition, supplier updates

NEGOTIATIONS AND CONTRACTING
2 finalists provide redline MSA and SLA prior to award

TMC DOWN-SELECT (shortlist)
Scorecard-based system to narrow down to 3 finalists(Post-presentations)

RFP PREPARATION
Bidder list. Pre-Bid conference. Data Collection

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BUSINESS CASE
Travel Agency (TMC) Bid

RFP
Process Benefits

- Rationalizes agency fees
- Improves process flow
- Enhances risk management
- Optimises technology solutions
- Validates the market to ensure highest value is obtained

Savings Opportunities

- Online fees
- Offline fees
- Airfare savings guarantees
- Hotel Savings
  - Consortia rates
  - Commission returns

Multiple fee structures exist
Offline (by phone) | Online (using self-booking tool) | Change fees (vary by agency)

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EVERY TMC AGREEMENT HAS HOLES THAT CAN BE REPAIRED

3rd Party Fees

Definitions: Transaction Touchless Commissions

Currency Fluctuations

Overrides

Industry changes that impact TMCs

Audit

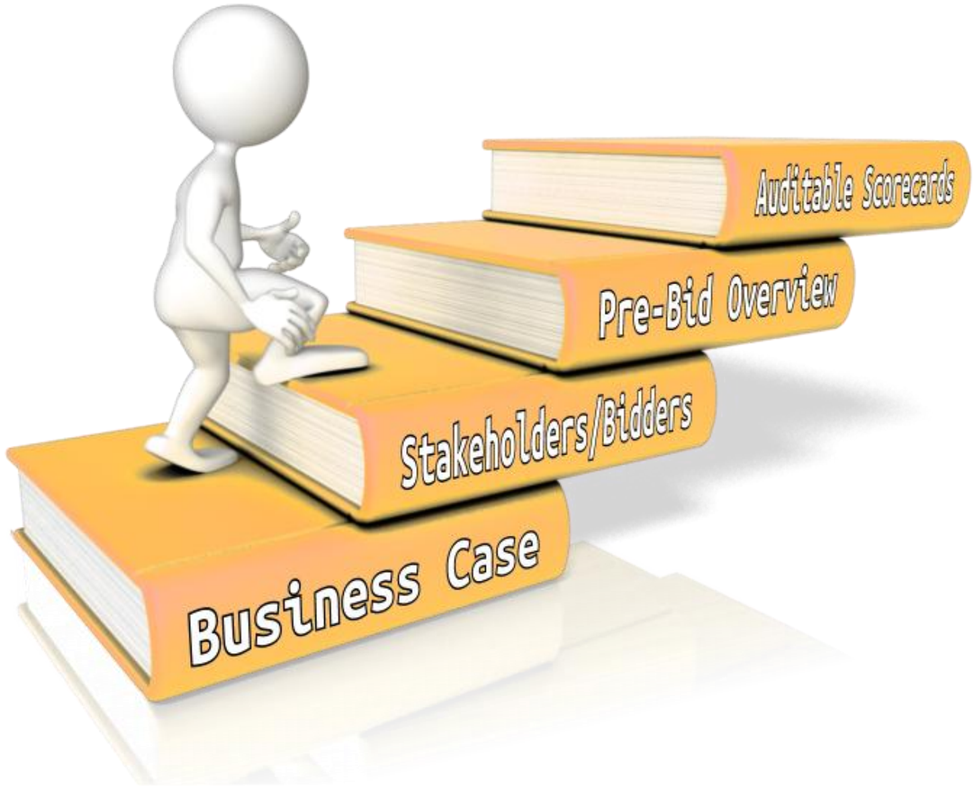
COLA Benefits Annual Increases

Agent-assisted Fees

RFP Project Goal

5 steps in the process

What is the 5th Step?



TMC Revenue Streams

Commissions & Overrides

Commissions & Overrides

Commissions & Overrides

Segment Fees & Conversion Bonus

Client Fees

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https://www.businesstravelnewseurope.com/Europes-leading-TMCs

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TOP 5 TMC MISTAKES DURING AN RFP ENGAGEMENT

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TOP 5 TMC MISTAKES DURING AN RFP ENGAGEMENT

1. Using the client logo on more than the first slide
2. Copying and pasting a quote from their CEO from their website
3. Having a technical person showing your reporting tool for the travel manager
4. Claim to have >98% client retention
5. Focusing on your multitude of slides instead of your audience, thus running out of time
6. Trying to tell you about your own business by copying information from your website or company report
7. Spending 15 minutes talking about their history, rather than focusing on your needs and their solutions

8. The devil always lies in the detail – it is extremely important for buyers to ask the right questions
9. You are not evaluating the quality of their bid writer, nor their presentation skills – keep focused on the content!

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Global TMC RFP Project Summary

Data Collection
Assemble Spend Data

- TMC Data
- Corporate Card
- Expense System

Source
Customized TMC RFP

- Transient travel requirements
- Group travel
- External/guest Travel

Project Manage
Online RFP

- Manage Q&A Period
- Down-Selection (shortlist) recommendations
- Financial Analysis

Negotiate
Contract Metrics

- Online and Offline Fees
- SLA / KPIs
- Implementation Guarantees
- Cash Incentives

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Customized Scorecards (3 different scorecards)

Description												
	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points
Air Hotel and Car												
1 Airlines- Supplier Relations	2.17		2.83	2.1	3.00	2.3	2.33	1.8	2.33	1.8	1.83	1.4
2 Lowest Fare Guarantee	2.2		2.17	2.2	2.17	2.2	2.17	2.2	3.33	3.3	2.00	2.0
3 Low Cost Carrier Access			2.50	2.5	2.50	2.5	2.50	2.5	2.50	2.5	2.17	2.2
4 Upgrades and Special Services			50	0.6	2.33	0.6	2.33	0.6	2.33	0.6	2.00	0.5
5 Hotel Program	1			1.3	2.83	1.4	2.67	1.3	2.33	1.2	2.00	1.0
6 Billable Hotel Capability	2.1			1.2	2.67	1.3	2.33	1.2	2.50	1.3	2.33	1.2
7 Hotel Rate Technology	2.00			1.9	2.50	1.9	2.50	1.9	2.33	1.8	2.00	1.5
8 Car Rental Discounts	2.00			.5	2.00	0.5	2.00	0.5	2.17	0.5	2.00	0.5
						12.6		**11.9**		**12.9**		**10.2**
Special Services												
1 VIP	2.17	1.1			2.50	1.3	2.17	1.1	2.67	1.3	2.67	1.3
2 Local Language	1.83	1.8			83	2.8	2.83	2.8	2.50	2.5	2.83	2.8
3 Visa and Passport	1.67	1.3				1.5	1.83	1.4	3.17	2.4	1.83	1.4
4 Charge Card Reconciliation	2.00	0.5				0.5	2.17	0.5	2.17	0.5	2.17	0.5
5 E Ticket Tracking	2.33	1.8	2.5			1.9	2.33	1.8	2.67	2.0	2.33	1.8
6 OBT Support	2.17	1.1	2.50			1.3	2.33	1.2	2.50	1.3	2.17	1.1
7 Profiles	1.83	0.5	2.67				2.33	0.6	3.00	0.8	2.33	0.6
8 Expense Report Integration	1.50	0.9	2.33				2.33	1.4	2.50	1.5	1.67	1.0
9 Traveler Security	1.83	0.7	3.33	1.3			2.50	1.0	3.00	1.2	2.17	0.9
		9.6		**12.7**				**11.7**		**13.5**		**11.4**
Technology and MIS												
1 On Line Booking Tool Integration	2.00	2.0	2.67	2.7				2.7	3.00	3.0	2.17	2.2
2 Data Reporting-Global	1.83	1.8	3.17	3.2	3.00			2.7	3.50	3.5	2.33	2.3
3 Data Reporting-Regional	1.83	0.9	3.17	1.6	3.00			3	3.50	1.8	2.33	1.2
4 Online Travel Portal	1.67	1.3	3.50	2.6	3.17				3.67	2.8	2.17	1.6
5 Customized Reporting	2.17	1.6	2.83	2.1	3.00	2.			3.50	2.6	2.33	1.8
6 Automated Scheduled Reports	2.33	0.6	2.67	0.7	3.17	0.8			2.67	0.7	2.33	0.6
7 Client Billable Tracking	2.50	1.9	2.67	2.0	2.83	2.1			00	2.3	2.67	2.0
		10.1		**14.8**		**15.0**				**16.5**		**11.6**
Global Capability												
1 Overall Global Delivery	1.17	4.1	3.33	11.7	3.33	11.7	2.33			9.3	2.00	7.0
2 NORTH AMERICA	2.67	5.3	3.17	6.3	3.33	6.7	3.00			3	2.50	5.0
3 EMEA	1.50	1.8	3.17	3.8	3.33	4.0	2.33				2.33	2.8
4 APAC	1.00	0.7	2.67	1.9	3.17	2.2	2.50	1			2.50	1.8
5 LATAM	0.67	0.3	2.67	1.1	2.83	1.1	2.17	0.9			2.17	0.9
6 Implementation Plan	1.67	1.7	2.83	2.8	2.83	2.8	2.50	2.5			00	2.0
7 Account Management	2.50	1.3	3.00	1.5	3.00	1.5	2.50	1.3			0	1.0
8 24/7 Service	2.17	1.5	2.83	2.0	2.67	1.9	2.33	1.6	2.		2.17	1.5
		16.6		**31.1**		**31.9**		**25.0**				**21.9**
Total Score		**46.9**		**70.7**		**72.5**		**61.5**				**55.1**

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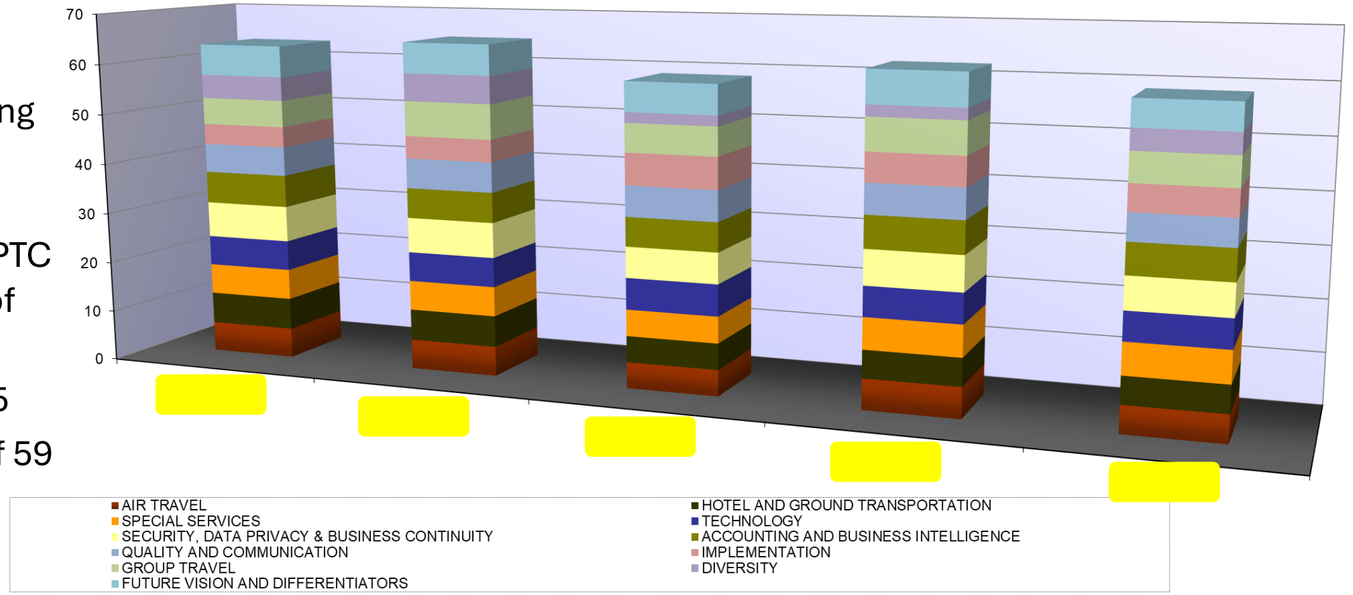
RFP Scoring Matrix - Selected Questions

TMC	AIR TRAVEL	HOTEL AND GROUND TRANSPORTATION	SPECIAL SERVICES	TECHNOLOGY	SECURITY, DATA PRIVACY & BUSINESS CONTINUITY	ACCOUNTING AND BUSINESS INTELLIGENCE	QUALITY AND COMMUNICATION	IMPLEMENTATION	GROUP TRAVEL	DIVERSITY	FUTURE VISION AND DIFFERENTIATORS	TOTAL
A	6	6	6	6	7	6	6	4	5	5	6	**63**
B	6	6	6	6	7	6	6	4	7	5	6	**65**
C	5	5	5	6	6	6	6	6	6	2	6	**59**
D	6	5	6	6	7	6	6	6	6	2	6	**62**
E	5	5	6	5	6	6	5	5	6	4	5	**59**

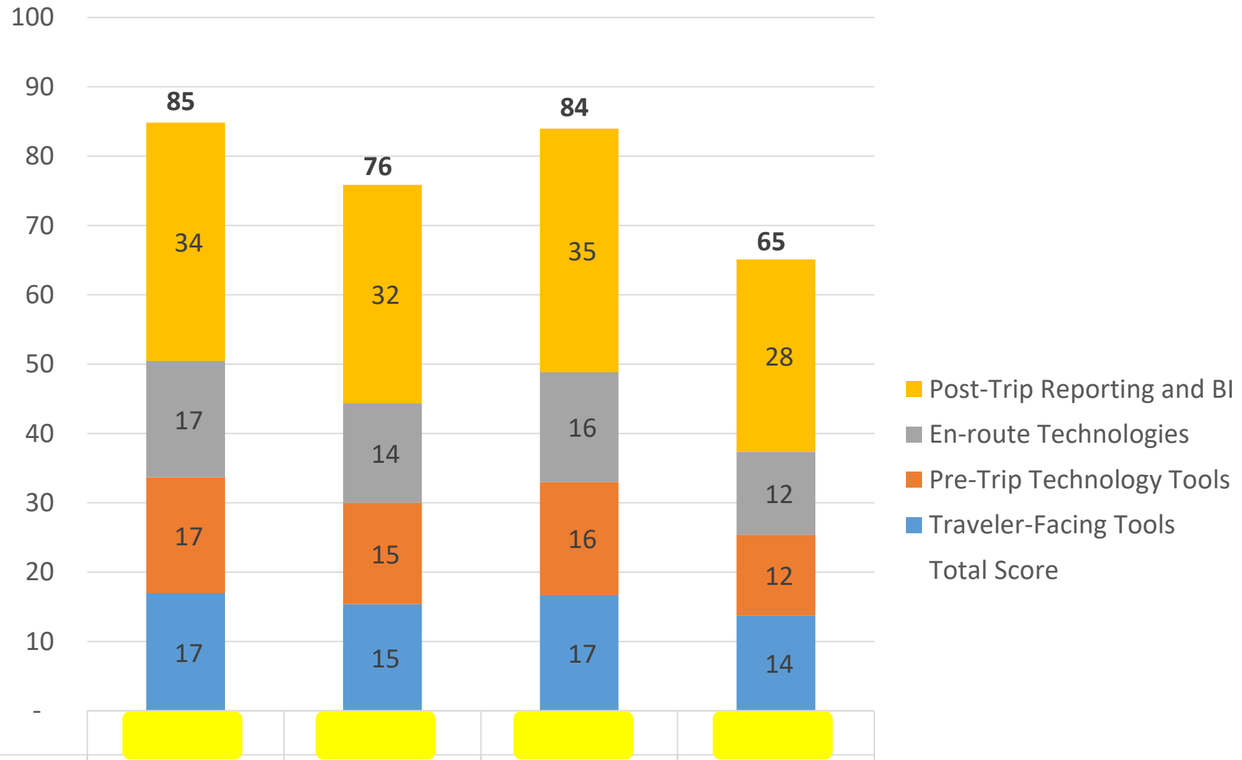
- Each scoring section was weighted equally with the highest possible score equaling 100
- 83 questions selected by PTC and XYZ and scored by three PTC members with over 50 years of travel sourcing experience
- TMC A had highest score of 65
- TMCs D/E had lowest score of 59



Scoring Legend:

0 - Does not meet requirements
1 through 3 - Meets some requirements; exceeds none
4 through 6 - Meets nearly all requirements; exceeds few
7 through 9 - Meets all requirements; exceeds some
10 - Meets or exceeds all requirements

Technology Demonstrations Scorecard Results



Post-Trip Reporting and BI	34	32	35	28
En-route Technologies	17	14	16	12
Pre-Trip Technology Tools	17	15	16	12
Traveler-Facing Tools	17	15	17	14
Total Score	85	76	84	65

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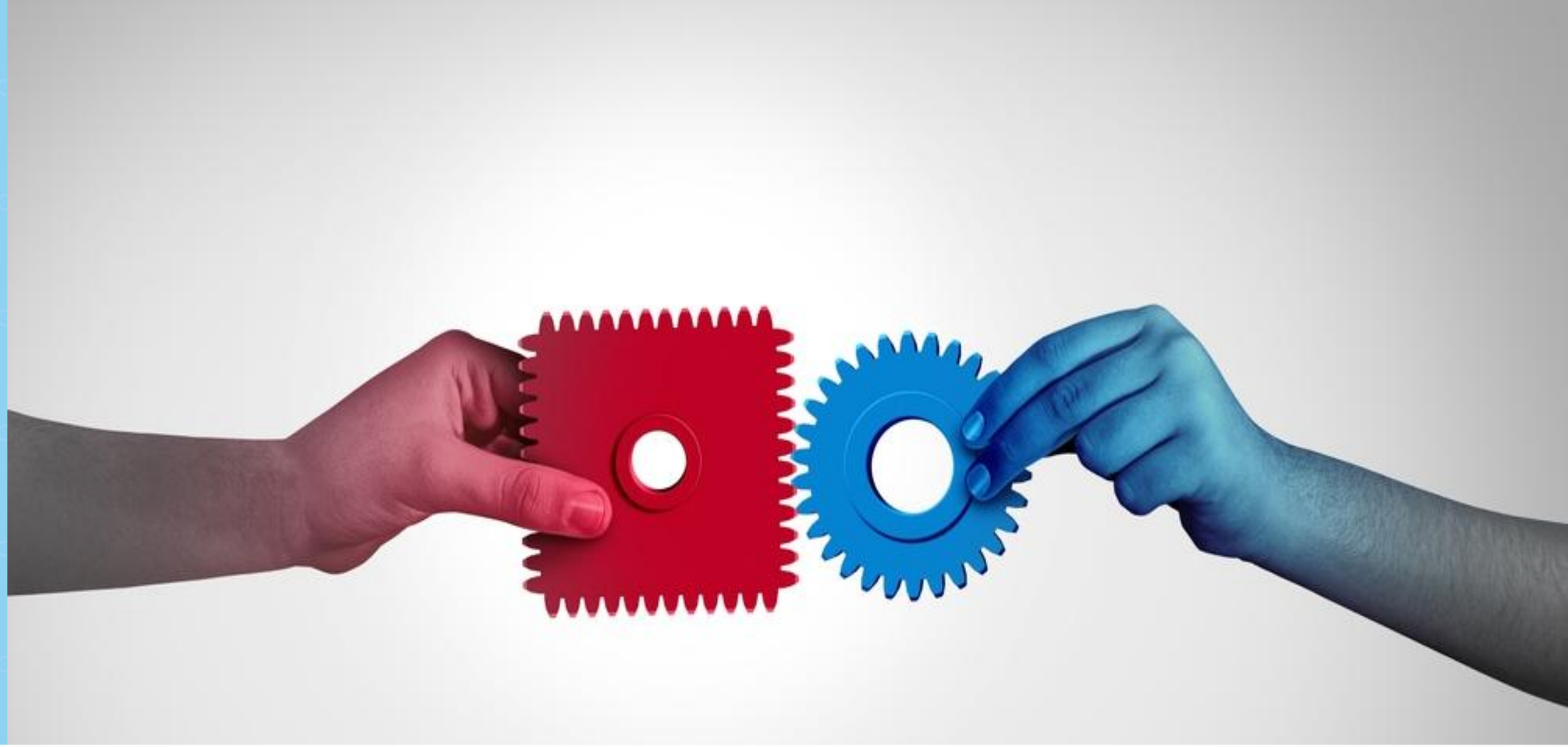

OBT Selection Is After You Select Your TMC

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There Are Fewer OBT Choices Than TMC Choices….Here's a Few

Amadeus
Cytric
atriis
Deem®
onesto
SAP Concur
zeno
BY serko
ZENMER

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TMC RFP Should Also Include TSP's

COMPANY	VERTICAL
AGENT 24	After-Hours
CRA	After-Hours
NDO	AI driven bookng tool
AI	AI driven data analyti
	Airfare Search
	Blockchain
	Blockchain
CTS	Commission Collection
	sortia Hotel
HICKORY GL	ssions and 24/7
AMADEUS	
KIU	
SABRE	
TRAVELPORT	GDS
REED & MACKAY	Global
BTP AUTOMATION	Hotel Sour
CERTAIN	Meetings
CONFERENCE DIRECT	Meetings
CVENT	Meetings
HELMSBRISCOE	Meetings
ATRIIS	OBT
CYTRIC	OBT
DEEM	OBT
GETTHERE	OBT
KDS	OBT
LOCOMOTE	OBT
SERKO	OBT
SKYLINK	OBT
TRAVEL DOO	OBT

COMPANY	VERTICAL
TRAVEL SKY	OBT
ENO	OBT
CUR	OBT
O	OBT and Platform
	OBT and Platform
R	OBT and Platform
	OBT and Platform
S	OBT and Platform
TRIPSY	OBT and Platform
ZENMER	OBT and Platform
TRIPKICKS	BT Digital Marketing
MESH	ment Systems
SUREWARE	
UMBRELLA	
E GLOBAL FARES	
S	nt
UDIT	Te h
	Tech
T	Tech Co
	Tech Fligh
TH	Tech Hotel R
VINDO	Tech Hotel Sou
BIZLY	Tech Meetings
AGENCY TECH	Tech Mid-Office
CORNERSTONE	Tech Mid-Office
GRASP TECHNOLOGIES	Tech Mid-Office
TRONDENT	Tech Mid-Office
TRAVEL FUSION	Tech NDC

COMPANY	VERTICAL
TRAMS	Tech Reporting and Travel Accounting
EMBURSE GO	Tech traveler engagement
ROCKETRIP	Tech traveler engagement
ONNEXUS	TMC APAC
EN	TMC APAC
GBT	TMC Global
VEL	TMC Global
	TMC Global
C	TMC Global
FCM	TMC Global
GLOBA	TMC Global Consortia
DIRECT/	MC Mid Market
ADTRAV	Niche
ALTOUR	iche
FROSCH	e
GANT TRAVEL	
GRAY DAWES	
NAVAN	T
OMEGA WORLD	TM
SOLUTIONS TRAVEL	TMC
TAG TRAVEL	TMC Nic
TAKE TWO	TMC Niche
TRAVEL LEADERS	TMC Niche
TRIP.COM (Ctrip)	TMC Niche
TSI	TMC Niche
WORLD TRAVEL	TMC Niche
EGENCIA	TMC OTA
TRAXO	Unmanged travel tracking

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- Working with Airlines
- Working with Car Rental Firms
- Working with Chauffeured Transportation
- Taking on Travel Risk Management
- Selecting an Expense Reporting Tool

COMING SOON!

- Getting Started With Meetings Management

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Tell us what you think

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