Proposals Procedures for Sales and Service

1. Any Omega Employee

a. Any employee who receives an inquiry regarding Requests for Proposals (RFPs), Requests for Information (RFIs) or business travel services in general, should refer all potential customers to the proposals department at headquarters. The employee may call the proposals department with contact information for the prospective customer or the employee may refer the prospective customer to the proposals department. The proposals department may be reached by calling 703.359.0200 and asking the receptionist for the proposals department. You may also email the department at proposals@owt.net .

2. Sales Reps and Regional Managers
Requesting a Proposal

A. Standard Proposals (Jiffys)

a. Persons requesting a standard proposal (jiffy) must complete the online proposal request form on Omega's intranet and submit it to the proposals department at Omega's headquarters as directed in the online form.

b. Persons submitting the jiffy request should allow one (1) week turnaround time.

c. If a jiffy proposal is needed sooner than one (1) week, the salesperson should contact the department directly to see if scheduling and work load will allow for a shorter delivery time.

d. All sales persons are provided a soft (electronic) copy of a standard (jiffy) proposal so they may write a proposal themselves for a perspective client if, due to workload, staffing, deadlines, etc., the proposals department is not able to accommodate a request for a jiffy.

e. The proposals department will not provide a standard (jiffy) proposal for any account whose volume is less than $300,000 in annual air volume. Standard proposals for accounts smaller than $300,000 in annual air volume are the responsibility of the salesperson.

f. Formal RFPs, solicited or unsolicited, have priority over standard (jiffy) proposals.

B. Requests for Proposals (RFPs)

Salespersons or responsible person must:

a. Notify proposals department when a bid is anticipated

b. Forward any request or have the prospective client (or current client if a re bid) forward the request and all accompanying documents to the proposal department at Omega's headquarters via mail, fax or via email at proposals@owt.net. Email is the preferred method of delivery.

c. Contact the proposal department to confirm receipt of the RFP.

d. Request that the company issuing the RFP correspond directly with the proposals department during the bid process via email at proposals@owt.net. This is a group email that gives entire staff access to all incoming mail to prevent anything from being overlooked.

e. ***Read*** the RFP.

f. Evaluate potential business and the likelihood of it being a worthwhile bid. This will depend on many factors including established relationship with potential customer; potential customer's corporate culture; potential customer's travel profile and vendor and carrier contracts. See Bid Assessment Checklist under Omega forms.

g. Provide all available information to the proposals department that will enable the writer(s) to provide a thorough and well constructed response according to the needs and specifications of the prospective client.

h. Notify the prospective customer that formal RFP responses are handled from Omega's proposal department at the Fairfax, VA, headquarters office.

i. Request the contact for the bid process to forward all bid documents to the proposal department at the Fairfax headquarters and provide the proposal department's group email proposals@owt.net .

j. Use the group email for all correspondence with the department at all times so no requests or follow up information is overlooked.

k. Check with proposals department to make sure the RFP has been received.

l. Set up a conference call or meeting with the lead writer(s) to review the RFP.

m. Provide writer(s) with all information you have available that will aide in providing a comprehensive competitive bid, i.e., incumbent, current fees, configuration, services needed, unique travel requirement, global reach, key airline vendors, service or other issues with incumbent, why the company is going out to bid, etc.

n. Decide which specific question the sales person is more capable of responding to and set up date for response to proposal team.
o. Provide the proposal writer with a game plan for service: configuration, account management, online booking tool, servicing office etc.

p. Provide required references and all associated contact information or other required information as it pertains to references.

q. Make sure writer(s) is able to meet deadline and assist where needed.

r. Stay on timeline targets so as not to impede writers deadline

s. Follow communication steps above for any follow up information the potential
t. client requests post proposal submission.

u. Contact client as allowed by the RFP instructions to inquire about RFP process status

v. If selected as a finalist, prepare presentation and select team to make presentation. Coordinate via meeting or conference call to ensure a quality presentation. Arrange for travel needs if presentation out of town.

w. If awarded contract, contact proposals department with information regarding award and contact regional operations personnel and account management team to plan for implementation

x. If awarded the business, submit a signed contract or a signed Letter of Agreement to the proposals department so implementation steps may begin.

y. If not a successful bid, ask for a debriefing and supply information to proposals as to why the bid failed

z. The proposals department has ownership of all RFPs and their content.

aa. RFPs are delivered as required.

bb. Only the Executive Vice President has the authority to bind Omega.

cc. Only the Executive Vice President will negotiate pricing with perspective clients.

C. Unsuccessful Bid Debriefing

If you have lost a bid, request feedback to help you improve your future proposals. It is also helpful to request one even when you win, and for exactly the same reason. A debrief can help you understand how the customer perceived your proposal and help you make better decisions.

Responsible person(s) and/or proposals writer should request a debriefing using the following questions as a guide:

Basic questions:
- Who won?
- How many bids were received?
- What was your overall score?
- Was your score closer to the top or close to the bottom?
- What was the winner's score?
- Did the winner have the lowest price?
- Did the winner have a higher score on the technical evaluation factors?

If price was a major factor and you lost:
- Did you score higher or lower than the winner on technical factors?
- Did you scope the level of effort (number of people/hours) appropriately?
- Was the skill level of your proposed staffing too high?
- Did the winner propose more or less staff/hours? By how much?

If you scored higher on technical factors but lost:
- Did you lose because your higher score on technical drove up the cost?
- If your price had been the same as the winner, would your proposal have represented the best value?

If you scored lower on technical factors:
- How did your staffing score?
- How did your technical understanding and approach score?
- How did your past performance score?
- Did you have any compliance issues?

If the incumbent won:
- Did the incumbent score higher on the technical evaluation factors?
- Did the incumbent score higher on experience?
- Would a more clear statement that you would retain the incumbent staffing have improved your score?

Miscellaneous:
- How did the presentation and appearance of your proposal stack up against the competition?
- What differentiated you from the other bids?
- Was your proposal easy to navigate and score?

- Was the appearance of your proposal better, worse, or about the same as your competition?
- Did it contain any fluff or content that should have been substantiated better?
- Is there anything the customer would recommend for you to improve?