

# Enterprise RFP Playbook for Travel Agencies



Maya lost her first \$2M RFP in 2023. The agency had submitted a 60-page proposal she was proud of. Three weeks later the procurement officer sent a polite no-thank-you with a one-line summary: "Your response addressed our needs but didn't match our evaluation framework."



The single sentence in the rejection email was the most expensive sentence Maya had ever read, and the most useful. "Didn't match our evaluation framework." Until that moment, she'd treated an RFP like a long sales conversation. She'd written compelling answers, told stories about the agency's strengths, and trusted that quality would carry the day. None of that mapped to what was actually happening on the procurement officer's side.

That sentence became the seed of everything her agency now does on enterprise RFPs. This is the playbook, the answer library, and the win-rate metric the leadership team reviews quarterly.

# What Procurement Is Actually Doing



The biggest mental shift is realizing that enterprise procurement isn't reading your proposal the way a leisure customer reads it. They're scoring it against a rubric. The rubric has four to seven weighted criteria, usually some combination of price, service capability, technology, account-management depth, sustainability, and risk profile.

Each criterion has a numeric score. The proposal that wins is the one with the highest weighted total. Charm doesn't move the score. Beautiful design doesn't move the score. What moves the score is precise, evidence-backed answers that map cleanly to the criteria.

The agency that figures this out two RFPs into a corporate motion compresses its year-one win rate by half a year. The agency that doesn't figure it out keeps writing beautiful proposals that lose.

# The Answer Library That Replaces Heroics



The single highest-leverage thing Maya's agency did after the \$2M loss was build an answer library. Every RFP question they'd ever been asked, with the agency's best current answer, organized by category.

The library has 240 entries today. About 80% of any new RFP can be answered by pulling from the library and adapting two or three sentences. The remaining 20%, the customer-specific bits, is where the corporate lead spends real time. Before the library, the corporate lead spent 80% of their RFP time on questions they'd already answered ten times before.

The discipline that maintains the library: every RFP, win or lose, the corporate lead spends two hours updating the library with any new questions and improving any answers that didn't land. The library compounds. Year three answers are visibly better than year one answers because they've been tested.

# The Win Themes Conversation



Before the proposal gets written, the corporate lead runs a 30-minute "win themes" conversation with the deal team. The single question on the table: what are the three things this customer is most worried about, and how does the agency uniquely address each?

The themes get baked into the executive summary, the cover letter, and three to five strategically chosen answers throughout the proposal. The themes aren't generic ("we provide great service"). They're specific to this customer's published priorities, often pulled from their annual report, their CEO's recent talks, or their corporate sustainability commitments.

Win themes are the difference between a proposal that reads as "here's what we do" and one that reads as "here's why we're the right partner for you." The first one loses on rubric ties. The second one wins them.

## The Win Themes Conversation



The work that produces good win themes happens before the meeting, not in it. The corporate lead spends 90 minutes reading the customer's last annual report, scanning the CEO's most recent earnings call transcript, and noting any sustainability or technology commitments the customer has made publicly. By the time the deal team gathers, the themes write themselves. They're already on the page.

## Pricing for an RFP Is Different Math



RFP pricing isn't quote-the-trip pricing. The customer wants a structure they can model across the contract life, fixed management fee per traveler, supplier-rate-passthrough policy, volume rebate triggers, and year-end reconciliation method.

The agency that submits a winning RFP price is usually not the agency with the lowest headline number. It's the agency with the most predictable structure. Procurement officers can defend a higher price with a clear cost model. They can't defend a lower price that has surprises baked in.

Maya's agency sets the management fee three years out at signing, small annual increases scheduled into the MSA so there's no surprise renegotiation. The structural certainty wins more contracts than aggressive year-one pricing.

# The Cross-Functional Deal Team



Enterprise RFPs aren't a sales-team project. They're a cross-functional deal team for the duration of the proposal. Maya's deal team has four standing roles:

The corporate lead owns the proposal narrative and the win themes. Operations owns the service-capability answers (response SLAs, escalation paths, account-management cadence). Finance owns the pricing structure and the reconciliation methodology. The service lead owns the post-implementation answers (onboarding plan, year-one milestones, technology integration).

A deal without all four roles producing input is a deal where one or two answers are weaker than they need to be. On a rubric scoring system, a single weak answer can move the total enough to lose. The cross-functional team is what makes every answer at least a B+.

# The Win Rate Metric That Matters



Most agencies track RFP win rate as wins divided by submissions. That number is misleading because it doesn't separate signal from noise.

The metric that actually matters is win rate among RFPs that reached the shortlist. If you submit ten RFPs and three reach the shortlist and you win one, your shortlist win rate is 33%. The other seven submissions tell you about your qualification process; the three shortlist appearances tell you about your proposal quality.

Maya's agency tracks both numbers. Year one shortlist win rate was 22%. Year three was 56%. The shortlist appearance rate (RFPs that progress past initial screening) climbed from 30% to 62% over the same period. Both numbers were leading indicators of the corporate motion getting better, and reviewing them quarterly was what kept the deal team's discipline tight.

## When to No-Bid



The hardest discipline of an enterprise RFP motion is saying no. The default response to any inbound RFP is "yes, let's bid" because submitting feels like progress.

Maya's agency now runs a five-question no-bid checklist before committing time. Does the agency have a clear win theme? Is there an existing relationship with someone in the buying organization? Does the price band match the agency's cost structure? Is the contract length long enough to recover the proposal investment? Is the agency one of the top three on capability for what's being asked?

If the answer to any of those is "no," the default response shifts to no-bid. The agency saves the proposal effort for an RFP it can actually win. Year three, Maya's agency no-bid rate was 38%, and the win rate climbed because the proposals that did go out were on RFPs where the agency had real positioning.

## What Changed in Three Years



Three years after the \$2M loss, the corporate book was 38% of the agency's revenue. Eight active enterprise contracts, average contract value \$3.4M annual, average contract length 3.2 years. The win rate among shortlisted RFPs was 56%.

What changed wasn't a new product or a better salesperson. What changed was the agency learning to read the procurement rubric, to pull from a library of refined answers, and to no-bid the RFPs it couldn't win. The compounding effect of those three habits is what built a durable enterprise motion.

The lesson, in one sentence: enterprise sales isn't a different version of consumer sales. It's a different game with its own rules, and the agencies that win consistently are the ones that learned to play those rules deliberately.