

RFQ Master Package

Scope, instructions, governance structure and timeline

This RFQ master package is a ready-to-use structure for freight and logistics tenders. Adapt sections to your scope and remove non-applicable content.

Fields marked with *[TO BE COMPLETED]* are placeholders for the shipper.

0. RFQ Cover Information

Client / Shipper	[TO BE COMPLETED]
RFQ Title	[TO BE COMPLETED]
Issue Date	[DD MMM YYYY]
Bid Due Date & Time	[DD MMM YYYY — HH:MM — Time zone]
RFQ Contact Email	[TO BE COMPLETED]
Scope (Modes / Regions)	[TO BE COMPLETED]
Contract Start Date	[DD MMM YYYY]

1. RFQ Objectives and Scope

Describe what you are tendering and what success looks like. Keep this section factual and measurable.

1.1 Objectives

- Reduce total logistics cost while maintaining service levels.
- Increase comparability and auditability of bids (apples-to-apples).
- Strengthen compliance posture (customs filings, DG, security, documentation).
- Improve visibility, data quality and operational governance.

1.2 Scope of services

- Included modes: [Ocean FCL/LCL, Air, Road FTL/LTL, Rail, Courier].
- Included geographies: [Regions / countries].
- Included flows: [Import / export / domestic / cross-trade].
- Excluded services (if any): [Warehousing, packaging, last-mile, etc.].

2. Tender Instructions

Set clear rules for participation and submission. This reduces back-and-forth and prevents unqualified bids.

- Single point of contact: all questions via email to [RFQ Contact].

- Q&A deadline: [DD MMM YYYY]. Responses will be shared with all participants.
- Bid validity: minimum [90] days unless stated otherwise.
- Confidentiality: bid information must not be shared outside the bidding entity.
- Submission format: use the provided templates (Lane List, Rate Sheets, Accessorials Matrix, Provider Questionnaire).
- Bid completeness: incomplete submissions may be disqualified.

3. Governance and Communication

3.1 Roles and responsibilities

- Shipper RFQ Owner: [Name / Title].
- Operational stakeholders: [Names / functions].
- Finance / AP contact (invoicing): [Name].
- IT / data contact (EDI/API): [Name].
- Provider account manager and escalation contacts required (see Provider Questionnaire).

3.2 Change control

- All clarifications, assumptions and exceptions must be documented.
- Any change in scope triggers a change note and updated pricing where applicable.

4. Lane and Shipment Profiles

The Lane List is the baseline for pricing and service commitments. Providers must quote against the defined profiles.

- Lane IDs and volumes are provided in: LC_Lane_List_Template_Full.xlsx.
- Providers must flag data gaps and propose assumptions explicitly.
- DG / temperature / security constraints must be declared lane-by-lane.

5. Service Requirements

5.1 Lead times and cut-offs

- Pickup cut-offs, transit time commitments, and delivery windows must be stated.
- Time-definite lanes must be explicitly tagged and priced accordingly.

5.2 Visibility and milestones

- Minimum milestone set: Pickup, Departed origin, Arrived destination, Delivery.
- Exception management: delays, holds, customs events, damages.
- Provide tracking method: portal, EDI, API, email events.

6. Compliance, Risk and Insurance

- Customs/security filings responsibilities must be clear (e.g., ICS2 ENS, ISF/AMS, export declarations).

- Dangerous Goods (DG) competence must be evidenced if applicable.
- Claims process and response SLAs must be documented (see Provider Questionnaire).
- Liability, insurance options and exclusions must be declared.

7. Commercial Structure and Rate Submission

- Rates must be submitted using LC_Rate_Sheets_All_Modes.xlsx.
- Accessorials and surcharges must be declared in LC_Accessorials_Surcharges_Matrix.xlsx.
- Providers must specify what is included/excluded and any indexation rules (fuel, currency, etc.).
- Currency and validity period must be stated for each rate set.

8. Evaluation Methodology

- Mandatory requirements are assessed Pass/Fail (see Provider Questionnaire Section 0).
- Price is normalized lane-by-lane to ensure comparability.
- Non-price criteria include service, risk/compliance, IT/visibility and ESG.
- Weighting and scoring model: LC_Bid_Normalization_and_Scoring_Model.xlsx.

9. Award and Implementation

9.1 Award scenarios

- Single-award vs multi-award scenarios will be evaluated.
- Allocation modelling template: LC_Award_Allocation_Scenarios.xlsx.

9.2 Implementation plan

- 30/60/90-day rollout checklist: LC_Implementation_Plan_30_60_90.docx.
- QBR and KPI governance pack: LC_KPI_Dashboard_and_QBR_Template.xlsx.

Appendices (to include in your RFQ pack)

- A. Provider Questionnaire (capabilities, compliance, IT/data, claims, ESG).
- B. Lane List Template (shipment profiles).
- C. Rate Sheets (all modes).
- D. Accessorials & Surcharges Matrix.
- E. Scoring Model & award allocation scenarios.
- F. Implementation plan and KPI/QBR templates.