



# 3PL PROPOSAL TEMPLATE

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Creating a comprehensive and clear Request for Proposal (RFP) is crucial for selecting the right third-party logistics (3PL) partner. A well-structured RFP ensures potential partners understand your needs and can provide tailored solutions.

On the following pages, we've included a detailed proposal template and an example RFP to assist you in crafting your own, comprehensive RFP.

# RFP TEMPLATE & GUIDELINES

Utilize these sections, detailing specific information to create a comprehensive RFP for your logistics needs.

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## 1. INTRODUCTION

Provide an overview of your company and the objectives for seeking a 3PL partner.

## 2. COMPANY BACKGROUND

Offer detailed information about your company's operations, market presence, and strategic goals.

## 3. PROJECT OVERVIEW

Define the scope of services required from the 3PL provider.

## 4. REQUIREMENTS AND EXPECTATIONS

Specify the following requirements and expectations:

- Operational requirements:
  - Warehousing space
  - Preferred locations
  - Capability to handle specific product types, including any special handling requirements
- Technological requirements:
  - Integration with ERP, WMS, e-commerce platforms
  - Real-time inventory visibility and order tracking
- Performance metrics:
  - Order accuracy rate
  - On-time shipping rate
  - Monthly reporting on key performance indicators (KPIs)

## 5. PROPOSAL SUBMISSION GUIDELINES

Provide clear instructions on how and when to submit proposals. For example:

- Submission deadline
- Submission method
- Required documents:
  - Executive summary
  - Detailed proposal addressing all requirements
  - Pricing breakdown
  - Implementation timeline
  - References from similar clients

## 6. EVALUATION CRITERIA

Outline the factors that will influence the selection decision, such as:

- Experience and expertise
- Locations
- Scalability
- Technology integration
- Cost-effectiveness
- Customer service

## 7. PRICING REQUIREMENTS AND CONSIDERATIONS

Provide detailed information about your inventory, operations, and logistics needs to help 3PL vendors create a tailored pricing proposal. Include the following sections:

### INVENTORY

Provide a detailed breakdown of your current inventory to help vendors calculate storage and handling costs.

- Total number of SKUs
- Total number of on-hand pallets or cases
- Average units per case
- Average cases per pallet
- Case dimensions

## INBOUND RECEIVING

Clarify how and when your inventory arrives at the warehouse. This helps 3PL providers calculate labor and receiving costs.

- Frequency of inbound receipts
- Breakdown of inbound shipping methods
- Type of pallet receipts
- Mixed SKUs in cartons (Yes/No)
- Carton labeling details
- Documentation provided

## STORAGE

Provide insights into your storage needs and inventory movement patterns.

- Average number of units on hand
- Average number of cases or pallets on hand
- Pallet dimensions and case dimensions
- Frequency of SKU changes
- Velocity report

## OUTBOUND SHIPPING

Detail your shipping volume and preferences to help vendors estimate order processing and transportation costs.

- Average orders shipped per month/week/day
- Average units per order
- Average lines per order
- Packout documentation requirements
- Carrier preferences

## OTHER INFORMATION

Describe additional services and technical requirements that could impact pricing.

- Value-added services (VAS)
- Returns processing:
  - Disposition rules
  - Volume of returns
- Key performance indicators (KPIs)

## 8. ADDITIONAL INFORMATION

Request any other pertinent details that could aid in decision-making, including:

- References
- Case studies
- Certifications

## 9. CLOSING SUMMARY

- Provide a summary of expectations and contact information

# RFP EXAMPLE

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## 1. INTRODUCTION

We are Acme Home Goods, a growing e-commerce retailer specializing in sustainable home products, including kitchenware and decor. Our mission is to provide environmentally conscious consumers with high-quality, eco-friendly products.

To support our growth, we are seeking a 3PL partner to enhance supply chain efficiency, improve delivery times, and streamline operations through scalable and customized logistics solutions.

## 2. COMPANY BACKGROUND

Established in 2017, Acme Home Goods has expanded its reach to serve customers across the United States and Canada. Our focus on sustainability has driven a 30% annual growth rate. As we continue to expand, we aim to maintain our commitment to sustainability while improving operational efficiency.

We require a logistics partner with proven experience in handling high-volume e-commerce operations and implementing innovative supply chain solutions.

## 3. PROJECT OVERVIEW

We are seeking a 3PL partner to manage warehousing, order fulfillment, and distribution for approximately 12,000 orders per month, with seasonal peaks reaching up to 20,000 orders during the holiday season.

### Required services include:

- Inventory management for over 1,500 SKUs
- Efficient order processing and returns handling
- Real-time tracking and reporting capabilities
- Seamless integration with Shopify and NetSuite ERP systems

## 4. REQUIREMENTS AND EXPECTATIONS

In this section, we've outlined our operational, technological, and performance requirements. These details are critical for ensuring that potential partners understand our expectations and can meet them effectively.

### OPERATIONAL REQUIREMENTS

- Warehousing space of at least 50,000 square feet, with a preference for facilities in the Midwest to optimize delivery times across North America
- Ability to handle fragile and oversized items, such as glassware and furniture
- Climate-controlled storage for select product categories



## TECHNOLOGICAL REQUIREMENTS

- Integration with Shopify, NetSuite, and ShipStation
- Real-time inventory visibility and tracking
- Reporting dashboard with key performance metrics

## PERFORMANCE METRICS

- Order accuracy rate of 99.5% or higher
- On-time shipping rate of 98% or higher
- Monthly reporting on KPIs, including inventory turnover and customer satisfaction

## 5. PROPOSAL SUBMISSION GUIDELINES

This section ensures that all submissions are complete, organized, and aligned with our evaluation criteria.

- Submission deadline
- Submission method

## REQUIRED DOCUMENTS

- Executive summary
- Detailed proposal addressing all requirements and expectations
- Pricing breakdown
- Implementation timeline, including onboarding steps
- At least three references from clients with similar operational scopes

## 6. EVALUATION CRITERIA

To help potential partners craft their proposals effectively, we've detailed the specific factors we will prioritize during our evaluation process, including:

- Demonstrated success in managing e-commerce logistics for similar product categories
- Warehousing and distribution facilities that align with our geographic needs
- Ability to grow alongside our business and adapt to seasonal demand
- Compatibility with our systems and real-time tracking capabilities
- Competitive pricing with clear value-added benefits
- Proactive communication and support

## 7. PRICING REQUIREMENTS AND CONSIDERATIONS

This section details our inventory, operations, and logistics needs. It provides the necessary data for creating accurate, tailored pricing proposals that effectively meet our needs.

### INVENTORY

- Total Number of SKUs: 1,500
- Total Number of On-Hand Pallets or Cases: 800 pallets or 2,400 cases
- Average Units Per Case: 12 units
- Average Cases Per Pallet: 60 cases
- Case Dimensions: Vary, average size is 16" x 12" x 10"

## INBOUND RECEIVING

- Frequency of Inbound Receipts: 15 shipments per week
- Breakdown of Inbound Shipping Methods: 50% LTL, 40% TL, 10% Parcel
- Type of Pallet Receipts: 70% full pallets, 30% mixed pallets
- Mixed SKUs in Cartons: Yes
- Carton Labeling Details: Item number, lot, and quantity provided on all cartons
- Documentation Provided: ASN and PO paperwork provided for 95% of shipments

## STORAGE

- Average Number of Units on Hand: 30,000 units
- Average Number of Cases or Pallets on Hand: 2,400 cases or 800 pallets
- Pallet Dimensions: Standard 48" x 40" x 72"
- Frequency of SKU Changes: Monthly for 10% of SKUs
- Velocity Report: Available upon request

## OUTBOUND SHIPPING

- Average Orders Shipped per Month: 12,000 (peak season: 20,000)
- Average Units Per Order: 5 units
- Average Lines Per Order: 3 lines
- Packout Documentation Requirements: Include branded packing slips and itemized invoices
- Carrier Preferences: UPS and FedEx preferred

## OTHER INFORMATION

- Value-Added Services (VAS):
  - Occasional kitting and special packaging for promotions
- Returns Processing:
  - Disposition Rules: 80% restockable, 20% damaged goods to be recycled or donated
  - Volume of Returns: Approximately 300 returns per month
- Technology Integrations:
  - Must support Shopify, NetSuite ERP, and ShipStation
- Key Performance Indicators (KPIs):
  - Order accuracy > 99.5%
  - On-time shipping > 98%
  - Returns processing within 48 hours

## 8. ADDITIONAL INFORMATION

This section requests additional details that will aid in our decision-making process.

- References: Provide contact details for at least three clients with similar operational scopes.
- Case Studies: Include examples of past successes in scaling e-commerce logistics operations.
- Certifications: List all relevant industry certifications (e.g., ISO 9001, OSHA compliance).

# CLOSING SUMMARY

We look forward to receiving your proposals and exploring how your services can support Acme Home Goods in achieving our operational goals. If you have any questions or need additional details, please contact our operations team at [operations@acmehomegoods.com](mailto:operations@acmehomegoods.com).

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## **AT IDS FULFILLMENT, WE BELIEVE THAT LOGISTICS IS MORE THAN JUST MOVING PRODUCTS.**

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It's the foundation that supports your business's growth, reputation, and customer satisfaction. With over 60 years of experience in tailored, scalable logistics solutions, we've partnered with businesses just like yours to turn their supply chains into competitive advantages.

When you choose IDS, you're not selecting a vendor—you're gaining a partner who understands the high stakes of your operations. From proactive optimization to seamless technology integrations, every detail of our service is designed to keep your business running efficiently, without you even having to ask.

If you're ready to take your logistics to the next level, schedule a discovery call to explore how IDS can make your supply chain a driving force behind your success.

For immediate assistance, contact us directly at (866) 232-6533 or email at [sales@idsfulfillment.com](mailto:sales@idsfulfillment.com).