Robin

THE NO-BS GUIDE TO

Workplace Management RFPs

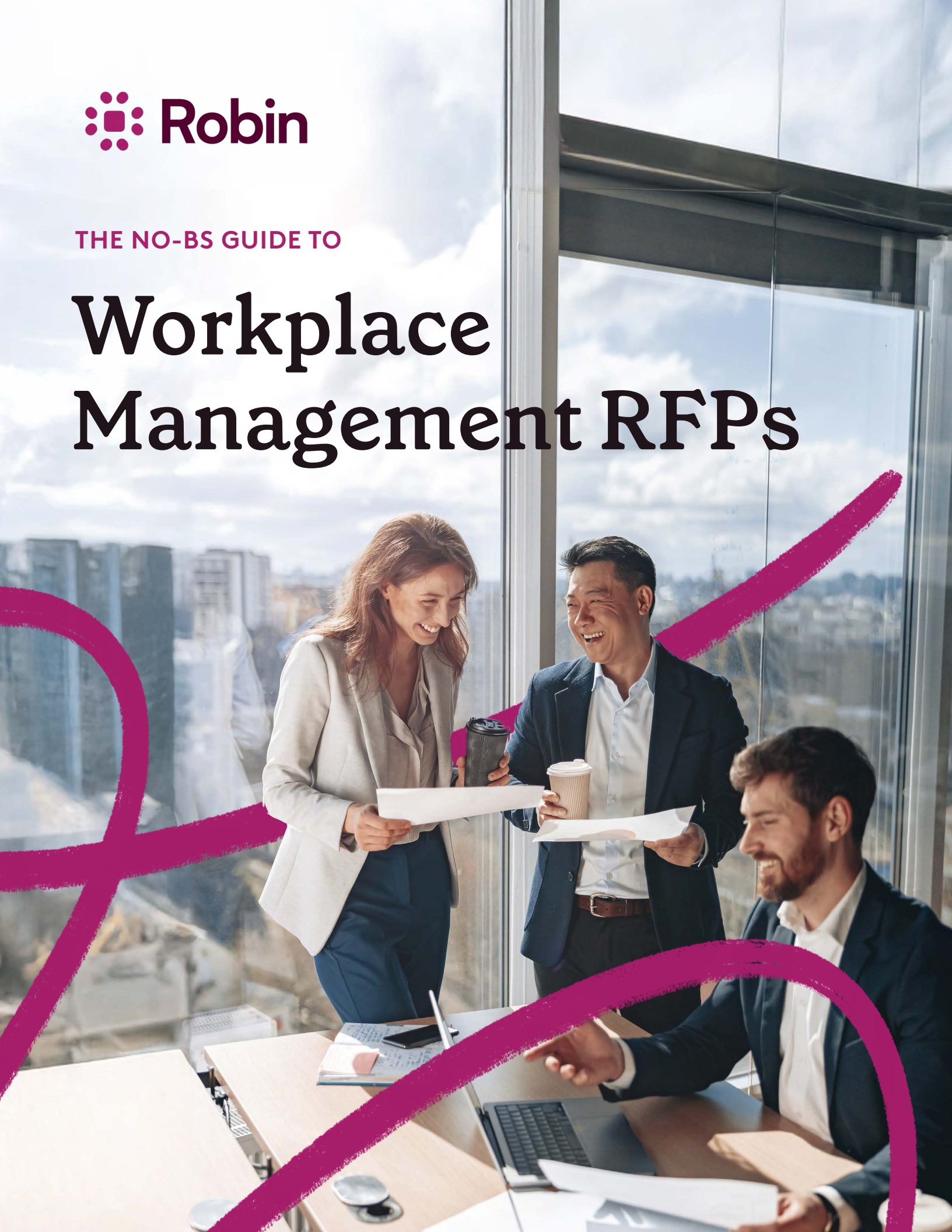


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86% of CEOs

are willing to reward employees who are in the office regularly

The stories are everywhere — companies want employees back in the office. In fact, 86% of CEOs are willing to reward employees who are in the office regularly. Yet, a majority of employees want the flexibility a hybrid arrangement brings and believe the return-to-office (RTO) push is rooted in leadership distrust.

The power struggle is causing headaches for everyone from leadership to workplace managers to employees. So, how can companies strike a balance that drives the connection and collaboration that CEOs crave, with the flexibility employees want? Where can they start?

Workplace management technology.

Companies don't have to embark on this journey alone. This guide is here to help you choose the right partner to complement your organization's workplace goals.

The Most Crucial Pieces in Workplace Management RFPs

RFPs are a standard practice for many organizations during the technology procurement process. But when it comes to **workplace management platforms** in particular, some buyers may fall short on what they deliver because they are missing two key steps.

Before you can start tackling your RFP, you have to understand what's really driving this investment. No one is going to hand money over for technology that's nice to have – it's critical to map your request to a tangible business need and get the right people involved ASAP. Let's dig into what that means.



1

Understand Company Workplace Goals

The right workplace management platform complements your organization's goals, acting as a long-term partner for achieving them.

POTENTIAL PITFALL

Skipping this step leads to misalignment, lack of executive buy-in and short-term solutions.

Common workplace challenges	Workplace goals
Unpredictable use of office spaces	Create lively offices with consistent space usage
No data into office trends, usage patterns	Understand how spaces are used by employees and visitors
Outdated office management and setups	Engage and retain employees with busy spaces and events
Space decisions made with guesswork	Justify real estate spend with comprehensive workplace data
Siloed tools, workflows, data in different places	Decrease office friction, tech spend and redundancies

By aligning with business needs, you're more likely to get long-term approval and budget from your leadership team. When you start conversations with different vendors, ask questions to ensure it's worth moving forward in the process. Here are some examples we've seen work:

1. How do customers use your software to **[insert business goal]**?
2. Is your platform adaptable to changing workplace strategies? How so?
3. How does your platform support collaboration and innovation among employees using office spaces?
4. Do customers see an increase in consistent office usage?
5. Can your system provide insights into how office spaces are being used, including occupancy rates and department breakdowns?

ROBIN TIP

Some workplace solutions meet basic needs like desk booking and may suit budget-focused buyers. However, for broader workplace goals, scalable and versatile platforms like Robin are a better fit.



2

Choose the Right People to Involve in the Process

It's time to choose your stakeholders. The **right** mix of people should directly align to your workplace goals – not just who you may want to involve or have involved in the past. Keep a focus on your business needs and major office friction points.

POTENTIAL PITFALL

Doing this step too late in the procurement process can result in missed requirements and a disconnected tech stack. Teams should align on one solution for multiple workplace challenges.

The choice isn't the same for every company, and **this template** offers a quick guide for how to choose the right people. Here are a few common groups we see purchase Robin's workplace management platform:

Scenario 1

GOALS

1. Understand how spaces are used
2. Improve operational efficiencies

WHO TO INVOLVE

- Facilities Director
- Head of IT
- IT Admin (influencer)

Scenario 2

GOALS

1. Justify real estate spend
2. Employee engagement and satisfaction

WHO TO INVOLVE

- Global Real Estate Lead
- Executive Sponsor
- Workplace Experience Manager (influencer)
- IT Admin (influencer)

Scenario 3

GOALS

1. Improve operational efficiencies
2. Employee engagement and satisfaction

WHO TO INVOLVE

- Head of IT
- Workplace Experience
- VP of HR (influencer)

Template: How to Choose the Right People for Workplace Tech Procurement

ROBIN TIP

Employees and visitors are key stakeholders too. A platform that works for admins but frustrates users could have you searching for a new solution within a year.

> Once I rolled out Robin, I didn't hear from anybody.
>
> ***In IT, that just doesn't happen.***

Dale Arnt, IT Operations Manager at VHB



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3

Establish Strategic Evaluation Criteria

Once you've nailed down who's involved and why you're writing this RFP, it's time to run through the rest of the process. We've highlighted some key areas to help you stay focused on what matters the most to your workplace – without getting lost in the details.



POTENTIAL PITFALL

Not every feature is a "must-have." Focus on your non-negotiables when choosing a platform.

Here's a checklist to keep with you as you start:

Primary capabilities

- [ ] Automatic resource reservations (e.g., spaces, desks, lockers, parking)
- [ ] Meeting service requests and ticketing
- [ ] Office space layout planning
- [ ] Visitor management workflows
- [ ] Office analytics and reporting
- [ ] In-office policy management and adherence
- [ ] Employee mobile app
- [ ] Wayfinding support

Technical requirements

- [ ] Integrations (e.g., Outlook, Slack, Google, access control systems)
- [ ] Security standards (e.g., data storage, certifications)
- [ ] Hardware compatibility
- [ ] SSO/SAML
- [ ] Cloud solution
- [ ] API library

Administration

- [ ] Custom roles and permissions
- [ ] Location-specific policies and guidelines
- [ ] Data exports
- [ ] Real-time notifications (e.g., service requests, resource issues, visitors)

Support services

- [ ] 24/7 access to support (across time zones)
- [ ] Dedicated account manager
- [ ] Onboarding and implementation planning
- [ ] Technical documentation

Proof of ROI

- [ ] Evidence of success with platform
- [ ] Customer references
- [ ] Business use cases
- [ ] Product release schedules, frequency

Template: Workplace Management Platform RFP

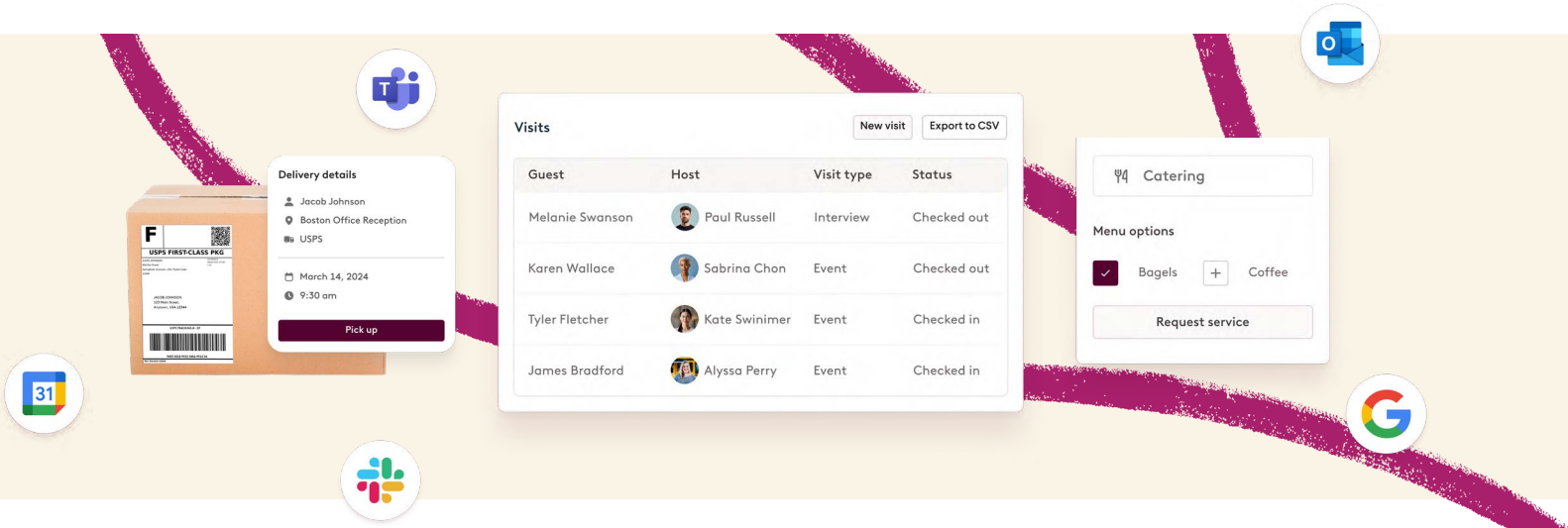
> ***Robin's ability to automate desk bookings and automate office check-ins has given us the clearest picture of our office occupancy.*** It's also one less ask of our busy employees who appreciate the change.
>
> IT Manager, Non-Profit Org



4

Evaluate, Evaluate, Evaluate!

There is a lot to care about as you get further in the procurement process, so here are some recommendations for what to focus on. With Robin's platform, for example, you'll see three core pillars of focus and functionality: **Workplace Operations, Space Planning and Employee Experience.**



Workplace Operations

Workplace professionals today are asked to take on more and more day-to-day office management responsibilities – especially as budgets decrease and consolidation is a focus. **Workplace operations cover anything that is needed to manage common workflows in the physical workplace.**

> Using Robin to streamline our meeting service needs has shortened our response time, and reduced errors and duplicate requests. Our team managers who most often require these services have reached out to say thank you for making this process so much simpler.
>
> Facilities Manager, Financial Services Org

CHECKLIST

Workplace operations capabilities

- [ ] **Meeting management**

  This includes things like conference room management, policies, priority and private reservations, and meeting service requests.

- [ ] **Meeting service requests**

  Catering, AV support, room setup and other requests should be centralized, customizable and set up to keep stakeholders informed.

- [ ] **Visitor management**

  An essential part of managing offices today includes the experiences of non-employees, such as board members, job interviewees and clients.

- [ ] **Delivery and package management**

  This helps ensure all packages and other mail are accounted for and get to the right people quickly.

- [ ] **Resource issue reporting**

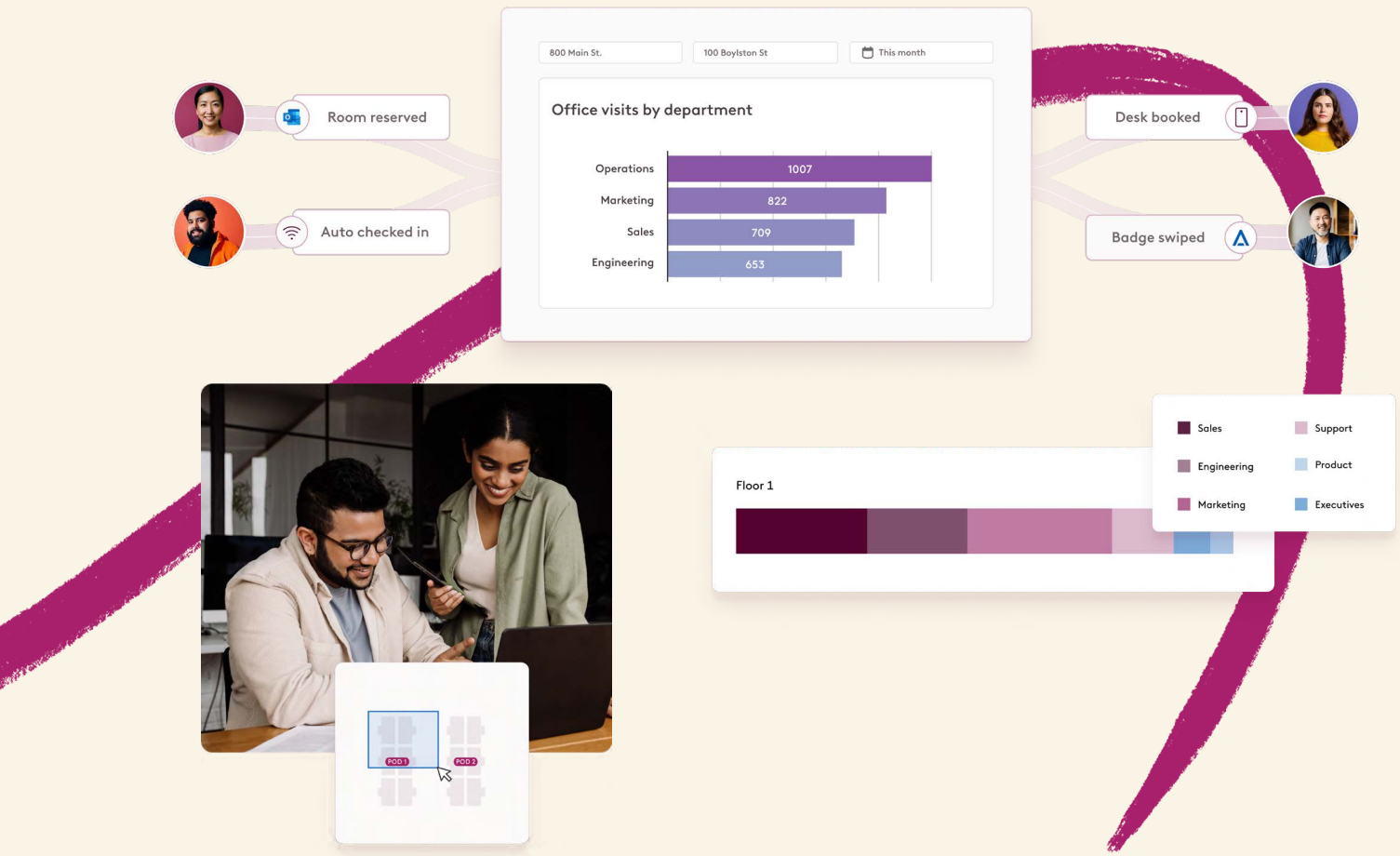
  Employees should be able to quickly send issues, such as a broken monitor or conference room audio problem, to the appropriate workplace admin.

- [ ] **Digital signage**

  Displaying digital signage around the office helps employees and visitors find their way more easily.

- [ ] **Integrations**

  Connecting with other workplace tools helps simplify management, increases employee adoption and improves reporting. Common integrations include Microsoft Outlook and Teams, Google Calendar, Slack, and HRIS and access control systems.



Space Planning

Space planning systems give workplace admins, such as facilities and real estate managers, a clear picture of space needs in a time when office usage is more unpredictable than ever. **Modern space planning must streamline office setup, allow for adaptation, surface insights and, critically, support a variety of office workflows via the right integrations.**

CHECKLIST

Space planning capabilities

- [ ] **Accurate data and insights**

  Workplace analytics today should help you understand whether business goals about the office are being met, and provide recommendations on how to make changes based on that data.

- [ ] **Office layout and resource management**

  Workplace admins require a source of truth for managing layouts and resource allocation that doesn't require switching systems.

- [ ] **Scenario planning**

  Map management should allow draft creation, collaboration, seating delegation and taking spaces offline as needed.

- [ ] **Stack planning**

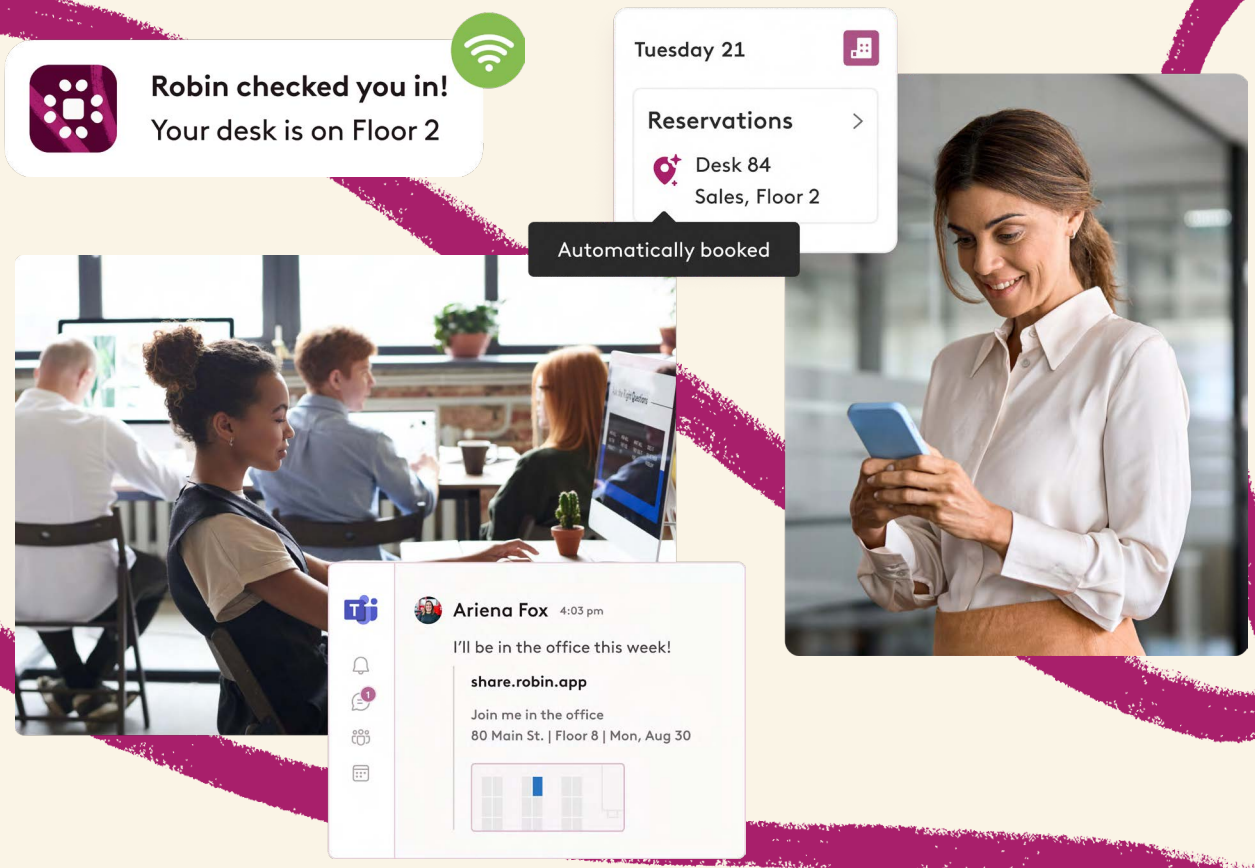
  Workplace managers can view assignments at the building level and arrange space based on factors like capacity and planned occupancy.

- [ ] **AI-driven planning**

  AI can be used to power planning, insights and reporting. This helps kickstart the "well, now what?" phase of space planning.

LOOKING TO MAKE REAL ESTATE DECISIONS BASED ON DATA?

Look for capabilities like custom reports, automatic sharing, collaboration rates, API libraries and access control system integrations.



Employee Experience

A workplace management platform is not worth your time if it doesn't make days at the office easier for your employees. **A great employee experience ensures the office is simple to navigate, fosters collaboration and empowers admins to use insights for continuous improvement.**

> Robin is easy to use. Our staff adopted it quickly.
>
> G2 User, Commercial Real Estate

CHECKLIST

Employee experience capabilities

- [ ] **Automatic resource booking**

  Facilitates AI-powered desk booking, room scheduling and reservations for whatever resources employees need for the day.

- [ ] **Automatic check-ins**

  Get accurate usage data with a variety of automatic check-in options (e.g., mobile, badge swipe).

- [ ] **Hybrid work coordination**

  Provide visibility to who's in the office and when to maximize time together in person.

- [ ] **In-office policy communication**

  Makes clear and regular communication easy, putting the policy front-and-center for employees and allowing them to keep track of their days in the office.

- [ ] **Multi-device and system access**

  Whether on mobile, web, status boards or their favorite communication tool (like Microsoft Teams), employees should be able to manage their hybrid experience their own way.

- [ ] **Employee feedback**

  Want to know how employees feel about the office? Ask them in a workplace survey.

5

Consider the Intangibles: Support and Partnership

Yes, the technology is important – but so is the support that goes along with it. The company you choose to work with should be a partner.

Support you can count on: Your workplace management partner should offer direct access to expert help when you need it. 24/7 email and chat support, for example, is expected, along with **detailed help documentation.**

DID YOU KNOW?

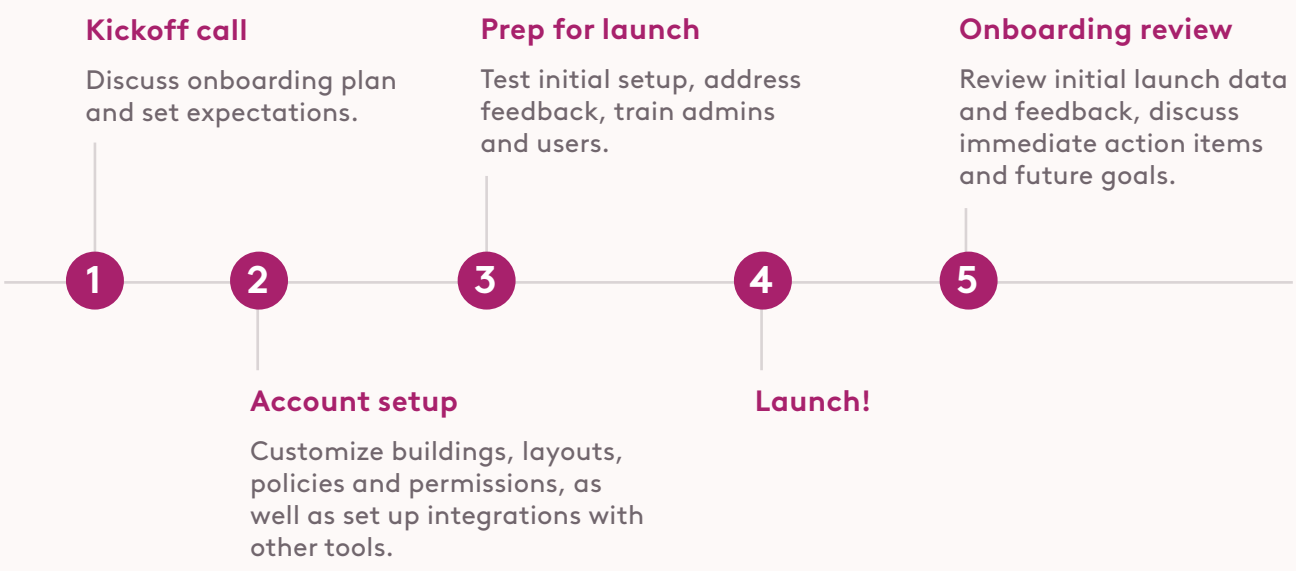
Robin's support team is always here to help with industry-leading response times.

< 2min
Median chat response time

96%
Satisfaction Rating

Onboarding and implementation you can trust: You need support getting a platform up-and-running, with clearly defined steps, responsibilities and deliverables.

Example timeline with Milestones



“

The partnership with our Account Manager and beyond – from Robin's CEO to your product and marketing teams, I know the team that works to make Robin work.

We try to find vendors we can partner with and not just be another client. I definitely feel that we have that relationship with Robin.

Dale Arnt, IT Operations Manager at VHB

Template: How to Get Executive Buy-in for a Workplace Management Platform

READY TO STEP INTO A NEW ERA OF WORKPLACE MANAGEMENT? ROBIN IS HERE TO HELP.

Manage your entire workplace on a single platform.

Book a demo today