

Pre-Trip Notification  
or Pre-Trip Approvals

# What's Right for Your Organization?

Travel Incorporated White Paper - 2020



# Setting the Stage:

## Shifting to a Managed Program

Finding the right balance to oversee travel due diligence, while staying true to your company culture and traveler convenience is challenging.

Over the past few months, many of our customers have enhanced their travel management programs to include a more structured process for ensuring safety through Duty of Care, as well as spend management through policy adjustments. Finding the right balance to oversee travel due diligence, while staying true to your company culture and traveler convenience is challenging.

As a specialist in tailoring programs to achieve this balance, TI has approached this topic by outlining options we make available to our partners for both Pre-Trip Approvals as well as considerations for Pre-Trip Notifications. It is our intent to provide the highest degree of clarity as well as guide you to making the best decisions for your organization.

To set the stage, corporations are shifting to a more managed program that incorporates defined structure, traveler safety, and spend management. Although many of our clients appreciated the flexibility for their travelers to make their own informed travel buying decisions, the obligation for their safety and security required contemplation of how to properly shift their travelers buying behavior to identify clear parameters through an approval process.

Whether this process is intended for a short term shift while travel limitations are in place, or for a longer term strategic approach, it is comforting to know you have options!

# Who can Be Designated to Approve a Trip?

The designated approver is tagged in the traveler's profile, and can be either the traveler's direct supervisor, or a company-wide administrator. If the approver is not available or on vacation, the approver can reassign another associate to receive the approval detail.

To reduce complexity in the approval processes, it is most common to limit the approvers to the above, but in some instances you may elect to have a "Conditional Approver" who would only be notified if certain fare rules were broken.

# What is the Difference between a Pre-Trip Notification and a Pre-Trip Approval?

## Pre-Trip Notifications

Pre-Trip Notifications provide trip purchasing information to the traveler's direct supervisor, or companywide assigned administrator, when a traveler makes a reservation that is either out of policy, or out of compliance for any component of the trip (air, hotel or ground transportation). No action is required, the booking is ticketed, but most can be voided within 24 hours without penalty.

## Pre-Trip Approvals

require a formal approval process for any out of policy or compliance trip component from the same direct supervisor or assigned administrator to proceed with the trip before the booking is ticketed.

Deciding which option is right you greatly depends on your company's requirements, resources and corporate culture. Let's dive into the benefits and related challenges of both options.

# Benefits and Challenges

## Only You Can Determine What's Best for Your Company

### Pre-Trip Notifications

A Pre-Trip Notification is an email notification which provides the information on the booking that is either out of compliance or out of policy, including the routing, fare, hotel, etc., and a listing of alternative options returned in the search which the traveler could have selected.

With Pre-trip Notification, there is no action required. The booking is ticketed without any hold being applied. Should the supervisor disagree with the purchase, they would have the opportunity to notify the traveler and request they void the transaction. By voiding within 24 hours of ticketing, there is no cost associated with the fare.

### Benefits

Notifications provide the least resource intensive approach while still having the ability to monitor travel purchases. As the pre-trip Notification allows for the visibility into out of policy bookings (example, can be tailored to policy for any flight that is \$100 more expensive than the lowest available fare), the Notification option continues to provide the detail of the trip, yet does not delay the transaction by blocking or having the risk of the rate changing as it is ticketed upon booking. The traveler is aware of the manager review, and encourages policy compliance.

**Flight Rule Triggered**  
Air Fare is greater than the least cost logical airfare plus 100 dollars - Notify Manager

**Reason Code:**  
PA - Passenger requested airline

Atlanta Hartsfield-Jackson Intl Airport (ATL) to Orlando Intl Airport (MCO)

Flight: DELTA Flight # 2672 Y  
 Departure: Atlanta Hartsfield-Jackson Intl Airport (ATL) Fri 12/11/2020 at 7:50 AM  
 Arrival: Orlando Intl Airport (MCO) Fri 12/11/2020 at 9:21 AM  
 Stops: Nonstop  
 Flt Miles: 404

Orlando Intl Airport (MCO) to Atlanta Hartsfield-Jackson Intl Airport (ATL)

Flight: DELTA Flight # 2324 Y  
 Departure: Orlando Intl Airport (MCO) Sat 12/12/2020 at 6:30 PM  
 Arrival: Atlanta Hartsfield-Jackson Intl Airport (ATL) Sat 12/12/2020 at 8:10 PM  
 Stops: Nonstop  
 Flt Miles: 404

**Best Options**

Category	Price	Vendor	Cities	Stops:
Best Price with the Fewest Stops	USD 241.20	DELTA	ATL-MCO	0
Least cost logical	USD 152.20	American Airlines	ATL-MCO	1

Options turned down:  
The following options were presented to the user, but not chosen.

Flight  
 Cost: \$152.20  
 Outbound Flight  
 153 Atlanta Hartsfield-Jackson Intl Airport (ATL) 12/11/2020 7:05 AM Charlotte Airport (CLT)  
 2674 Charlotte Airport (CLT) 12/11/2020 11:20 AM Orlando Intl Airport (MCO)  
 Return Flight  
 1611 Orlando Intl Airport (MCO) 12/12/2020 5:10 PM Charlotte Airport (CLT)  
 2677 Charlotte Airport (CLT) 12/11/2020 7:05 AM Atlanta Hartsfield-Jackson Intl Airport (ATL)

## Challenges

As there is no formal approval action required, travel would be booked without oversight, potentially impacting budget and pre-ticket policy compliance.

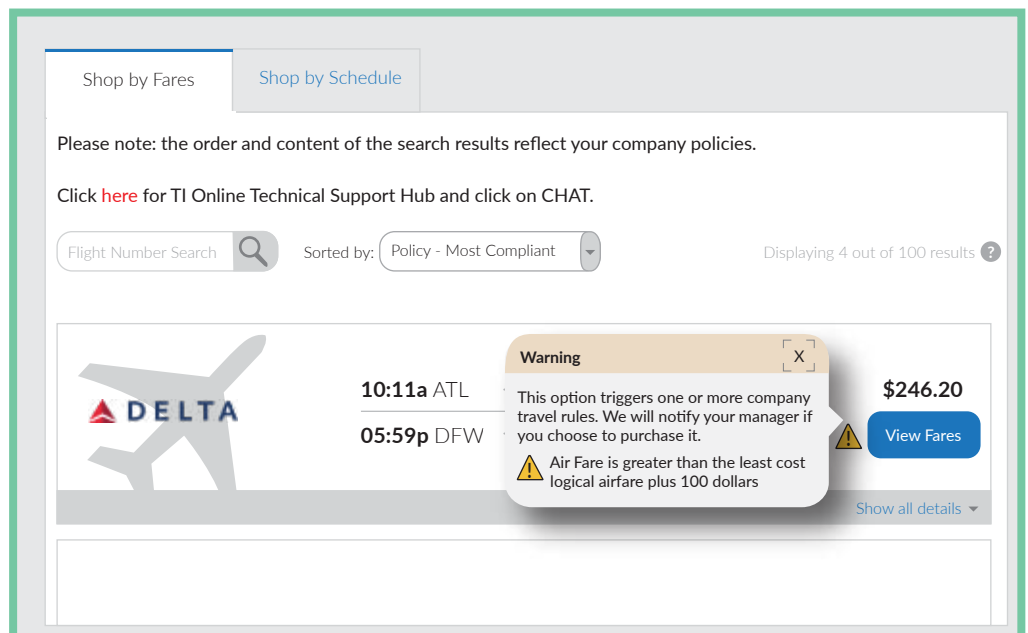
## Pre-Trip Approvals

Pre-trip Approvals require a formal approval process for any out of policy or compliance trip component from the same direct supervisor or assigned administrator to proceed with the trip before the booking is ticketed. These can be as prescriptive as requiring an internal authorization before a booking can even be made, or as simple as sending an email request to “approve” or “decline” if out of policy. Any pre-trip approval process can be included for bookings made offline through a TI Consultant.

As there are many approaches, we have outlined the most common for your review and consideration:

### Passive Approvals

The most common approach to Pre-trip Approvals is to provide a Passive Approval. The safeguard emails approval request and trip details for out of policy/compliance is emailed to the supervisor or administrator to approve. However, if no approval is received by the end of that day, the booking is ticketed to avoid fluctuations of fare. The traveler will be notified at the time of search if one of their selections is out of policy.



The screenshot shows a flight search interface with the following elements:

- Navigation tabs: "Shop by Fares" (selected) and "Shop by Schedule".
- Disclaimer: "Please note: the order and content of the search results reflect your company policies."
- Support link: "Click [here](#) for TI Online Technical Support Hub and click on CHAT."
- Search bar: "Flight Number Search" with a magnifying glass icon.
- Sort by: "Policy - Most Compliant" dropdown menu.
- Results: "Displaying 4 out of 100 results" with a help icon.
- Flight card for Delta: Includes the Delta logo, flight times "10:11a ATL" and "05:59p DFW", and a price of "\$246.20".
- Warning box: A yellow box with a close button (X) containing the text: "Warning: This option triggers one or more company travel rules. We will notify your manager if you choose to purchase it." Below this is a yellow triangle icon and the text: "Air Fare is greater than the least cost logical airfare plus 100 dollars".
- Buttons: "View Fares" (blue) and "Show all details" (grey).

## Hard-Stop Approvals

A more controlled approach is to require each out of policy/compliance ticket to be approved via email by the supervisor or administrator replying “approve” or “decline” to the email. In this instance, the booking will not be ticketed until an approval is made.

From: **Concur Travel** <[TravelWizardApprovals@concur solutions.com](mailto:TravelWizardApprovals@concur solutions.com)>  
Date: Tue, Oct 13, 2020 at 4:53 PM  
Subject: Travel approval required for traveler William Never  
To: <[user.name@company.com](mailto:user.name@company.com)>

### Action Required

One of your employees has submitted a request for travel that requires approval. Please review the trip details, then approve or reject the request following the instructions below.

**Traveler Name:**  
William Never

### What do I need to do?

You can approve or reject this trip by either:

- Replying to this email with the word “Approve” or “Reject”
- Logging into Concur Travel and following the instructions to approve or reject the trip

### When do I need to do it by?

This trip **must be approved or rejected by: 10/14/2020 9:00 PM Eastern time (10/14/2020 9:00 PM Eastern time)**. If you do not approve the trip by this time or if you reject the trip, it will **automatically be cancelled**.

## Authorization Prior to Booking Travel

A few of our clients have chosen to require an authorization before travelers have the ability to search for a reservation in Concur. The authorization process can include requiring an authorization number, or simply a verification the trip has been authorized. This is especially useful in a short term environment when every trip needs to be authorized.

### Welcome to Concur!

We need a little more information to start booking your trip. Please take a moment to fill out the following fields and click **Next**.

Thank you.

Please Provide your 10 digit trip approval code obtained from your manager.

[Required]

To reduce the complexity, Concur can be set up to simply have a Box Check to validate the trip was verbally approved. In either instance, this will act as a gatekeeper prior to allowing the traveler to actually search for their fares. Below please find sample options for authorization requirements at the time of booking:

### Welcome to Concur!

We need a little more information to start booking your trip. Please take a moment to fill out the following fields and click **Next**.

Thank you.

Please confirm that your Travel Authorization Form has been approved by your manager [Required]

 I confirm that my Travel Authorization Form has been completed and approved.

## Benefits

Pre-trip approvals apply more governance to the approval process, resulting in a higher travel compliance as the travelers know the booking is being reviewed and possibly scrutinized. By outlining specific rules that need to be complied with at the time of booking, the traveler tends to shift their buying behavior to remain in compliance.

## Challenges

The most significant challenge to pre-trip approvals is the possibility the fare will increase prior to approval, or seating availability may be limited. Additionally, although the traveler is aware that the ticket is being held based upon approval, they may not validate that it had been approved and ticketed. Therefore, if it was not approved the reservation will not have been completed and there will be no record of the reservation. This tends to cause traveler confusion and last minute rebooking requests.

Any approval process will require additional resource requirements, and the level of action needs to be balanced with the objectives of the program. If you elect to implement an Authorization Process, this will require your company to set up the process internally providing a mechanism for the traveler to request an approval and to receive either the authorization number or validation of approval prior to booking the trip.

## Summary

Travel Incorporated is here to assist your decision making when determining if a Pre-Trip Notification or Approval process is right for you.

We provide you with reporting capabilities outlining non-compliance and missed savings to assist with your analysis and decision making, and appreciate the opportunities to partner and improve your overall travel program.

**Travel Incorporated** is your Industry Expert and available to assist with any of your pre-trip notification and approval needs.

4355 River Green Parkway, Duluth, GA 30096 USA  
(770) 291-4100