



The 5 Fundamentals of a Successful Travel Program

Travel Incorporated Whitepaper



We are frequently asked what makes a successful travel program. While the answer to this question is relatively straight-forward, consistent success requires planning, structure and measurements. It is important that you are clear with your objectives and the program takes into consideration every stakeholder's voice. As we discuss the Fundamentals of a Successful Travel Program, we ask you to embrace the reality that success is not reliant on perfection.

We have broken down the categories into 5 primary areas of focus:

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1 | Culture and Communication

Culture

Each company has a personality. It is what attracts the right people based upon individual skills, attitude, approach, collaboration and contribution. It sets the foundation and consistency in all aspects of the business as to why your organization exists and flourishes. Just as unique as your corporate culture, so is the importance of creating a **travel policy that aligns with your company values**. Travel is personal.

When building out a travel policy, it is important to balance the needs of the individual with the responsibility for cost savings and avoidance. A modern travel policy must be fiscally attuned, while addressing traveler safety, wellness and job satisfaction.

Communication

No matter how defined your travel policy, the traveler is often the final decision maker when booking their trip. They want to feel empowered and to be trusted to make the right decision. **Encouraging policy compliance** can largely be accomplished by first asking the travelers what they like about the policy then what and why they would ask for changes to be made. As a general rule, people appreciate being heard and having their input taken into consideration. This is not meant to imply that every request must be accommodated, but when we communicate back and share the 'why' behind the decision, the approach provides greater clarity which inherently leads to higher compliance.

Managing change is also best approached through **regular, clear and easily accessible** methods of communication. Keeping the points defined with the value of the change will reduce anxiety, frustration and alleviate confusion.



2 | Setting Strategic Objectives

Whether you are rolling out global travel in multiple countries or redefining your domestic program, understanding your strategic objectives and applying the structure to practically and realistically achieve the goals is critical to the success of your program. We find the following principles are beneficial to ensure you are on the best track to succeed.

- 1 When setting the objectives, ask yourself **what you are striving for** and why it is important?
- 2 Strategic objectives must have a long-term, forward-focused view, and have a **lasting impact** on your organization.
- 3 Identify what you require to achieve the goals so they are **actionable**. Be open to multiple approaches for achievement, as what may seem logical at first glance may not be practical in application.
- 4 Determine how you will **measure success**. If the goal is subjective, it should not be included as part of your strategic objectives.

As the travel program impacts every department within your company, it is imperative to understand what is important for each of the stakeholders and how the objectives within your framework may have an impact on each individual.

If you are rolling out a global program, make sure you are working with and listening to key stakeholders in each region. These individuals will represent your **'boots on the ground'** and provide you with the regional nuances, travel booking behaviors, and content requirements that must be included in your planning. Consider the input from executive administrators, travel coordinators, and someone within the finance department to ensure proper alignment with your expense technology.



3 | Technology that Matters

The world is dependent on technology. Our travelers expect immediacy of information. Travel Managers are being asked to do more with less. But, technology for technology's sake will not help anyone, and technology alone should not be expected to solve all of your challenges. It will require a **balance of traveler and stakeholder adaptive changes** with the **new tools and services** you determine are appropriate.

What will make an impact is partnering with the technology providers that not only deliver the functionality that you need today, they **must be flexible** to adjust to your future needs, listen to your requirements, and deliver in a timely fashion.

- **Mobile:** Technology and travel go hand-in-hand, literally! Information flow must be mobile-first for every aspect of your business. Information should be **personalized and relevant** to the individual, and should ensure significant efficiencies to reduce your ever-expanding workload.
- **Global or Regional:** As you identify the operational requirements to support your strategic objectives, understand how your technology partners are able to scale with your organization's growth. **Do not confuse scalability with global servicing.** You may wish to consider regional providers rather than a global service partner, as the best technology decisions and partners may offer similar technology, but in a unique way that is necessary for the specific regions they serve, as well as be more agile to rapid changes within the travel industry.
- **Intuitive:** Technology will be adopted if it is easy to use, intuitive, and requires minimal (if any) training. It must be accessible any time of day, anywhere connectivity is available. It should also **provide information when you need it**, rather than having to 'ask' or search for it.



4 | Actionable Data and Duty of Care

Actionable data is more than consolidating data, it is what the data ‘tells’ you that allows you to make the best decisions and recommendations on behalf of your company. Travel data comes in many forms and it is key to understand the benefits and differences of Booking Data vs. Expense Data.

- **Booking Data** is the travel information that is derived from all travel components searched for and transacted utilizing your preferred channels, whether that be Online Booking Tool or Travel Management Company. It is the basis for Duty of Care and traveler tracking, identifying sustainability footprint benchmarking and reduction opportunities and provides intelligence around pre-trip data, traveler buying behavior, cost avoidance and missed savings.
- **Expense Data** is derived from expense reporting and payment reconciliations. It is largely post-trip in nature, and provides a more comprehensive view of historical spending.

Global Data - The Great Misconception

Successful Travel Programs benefit from both Booking and Expense data. For global programs, there is a misconception that a single ‘global’ Travel Management Company will have completely integrated, real-time booking data.

Global Travel Management Companies service in-country travel through a combination of wholly owned, joint-venture, and partner agencies. Each region feeds the data to the centralized location which then is ‘normalized’ for quality control and assurance. When building out the strategy, the most important aspect is for you to have **access to real-time data** for each location! It may not be necessary to have real-time consolidation of data. These are two key components that you will need to weigh as you determine your global program.

Duty of Care

Duty of Care is a moral responsibility for any company. With Successful Travel Programs, it should be structured in a way that provides the ability to identify pre-trip bookings made to regions deemed high risk, identify the location of the traveling employee in journey as well as pre-trip to enable changes to itineraries in the event of a pending weather incident, provide clear information as to processes for assistance during emergencies, and to enable easy communication when emergencies arise. Duty of Care **should not be thought of only for international travel**.



5 | Partners: Service and Support

The final and most important aspect of a Successful Travel Program is your choice of partners, specifically your choices for Travel Management Companies (TMC). There are many factors that weigh into your selection of a TMC including:

- **Proactive and Attentive Account Management:** Whether dedicated or designated, your Account Manager must be your primary point of contact that oversees your entire global travel program. They should be readily available to you during your preferred business hours and take ownership of your program by providing data intelligence and analytics, issue escalation and resolution. They should proactively identify opportunities for further improvements to your program followed by implementing each initiative and measuring its success outside of quarterly business reviews.
- **Technology:** Determine the importance and benefit of the tools being developed in-house, or if the majority is through third parties. Technology offered by the TMC should include self-service tools, actionable data analytics, along with services to improve productivity and efficiency. Upon evaluation, review and identify the frequency of product enhancements and how the technology can be applied to adjust to changes within the travel industry.
- **Expertise with Online Booking Tools:** To support best in class compliance and utilization, ensure your TMC has the ability to optimize your online booking tools by region and provide first level traveler support.
- **Honesty and Transparency:** Travel is the second largest controllable expense outside of goods and services. You need a partner who cares about your business, commits to open and honest communications, and services your travelers with efficiency and expertise.



Summary

A Successful Travel Program is multi-faceted. It requires planning and partnership, technology and clear communication. Your strategic objectives must be measurable and operational processes to deliver to the long term goals. It can seem initially daunting, yet will be highly appreciated by your executive management, and a source of structure for your travelers.

Travel Incorporated welcomes your consideration as your industry partner to help guide and support your strategic travel initiatives.

