



TripActions

THE ULTIMATE UNMANAGED
TO MANAGED TRAVEL CHECKLIST

What to Look for in Your First Managed Employee Travel Program

Taking on employee travel management can be like trying to tame the Wild, Wild West. Travelers book willy nilly, there's no visibility into where company dollars are going, and spend data is all over the place — it's every man for himself out there! No wonder you're ready to reign it in and create perimeters so you can regain control.

The hardest part of bringing in a managed travel program for the first time is understanding what to look for in the first place, which is why we've put together this handy checklist. From policy control and reporting capabilities to traveler experience and support, we've outlined the key features and functionality you'll want to consider on your search for the right travel management solution.

We've broken our checklist into four key areas of consideration — **implementation, inventory and policy, visibility and scalability, and traveler experience**. While our experience in the space has taught us that all of these areas play a crucial role in executing a successful managed travel program, we also understand that no two businesses are alike. Because of this, we've structured the checklist in a way that lets you focus on the aspects most important to your organization.

Simply locate your area(s) of concern below, tick off your focus area boxes while evaluating options, and start wranglin' that travel spend.



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Implementation

CHECK IN

When it comes to implementation, you'll want to consider a) simplicity and time to launch, b) system integration capabilities, and c) traveler onboarding and adoption. Worst case, you get stuck with a system that takes weeks or even months to get up and running, it doesn't fit in with your tech stack and workflows, and then no one knows how to (and then therefore doesn't) use it.

- It's quick and easy to get the system up and running**
Find out how long it's taken other customers to really get the ball rolling, both operationally and with rollout to employees.
- It offers dedicated support**
Is there an experienced team available to help you effectively launch the solution to travelers via proven templates and best practices?
- It can adapt to the workflows you're building and scaling internally**
Does the solution fit in or clash with other systems (such as HR or expense management) you're using as part of your current business ops tech stack?
- It will quickly deliver measurable ROI**
Work with vendors during the evaluation process to determine where each can deliver tangible value. Partnering on an ROI analysis will give you a good idea of what results you can expect.



Policy & Inventory

CHECK IN

A good way to achieve peak performance from your corporate travel program is by incorporating flexibility (within reason, obviously) where you can. Investing in dynamic policy capabilities, varied inventory from a wide variety of sources, and intelligent tech that surfaces personalized results for your travelers will help your program succeed. Think of how you can provide a consumer-like experience while keeping things in check cost-wise with pre-set, dynamic perimeters.

- ❑ **It surfaces a wide variety of inventory across flights, hotels, cars, and rail for any given search**
We recommend including inventory that's featured on popular consumer sites; travelers who can't find options they'd find on sites such as Priceline or Kayak often look outside the provided solution.
- ❑ **It surfaces all available flight and fare details across suppliers within the platform**
Let travelers consider their preferred fare class, whether Premium Economy or Business, and see all info per specific flight (ie. cancellations, seat type, on-time percentages, etc.) while also understanding what's in-policy.
- ❑ **It allows travelers to search flexible date-ranges for flights**
If your traveler has some wiggle room with their travel dates, this feature can help them book the most cost-conscious option.
- ❑ **It lets travelers book their hotels, flights, car rentals, and more in one place**
Bonus points if the solution neatly organizes individual business and personal travel itineraries so that details are always easily accessed.

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Policy & Inventory

- It lets you easily set and apply flexible policies that account for the who, where, and when of every individual itinerary**

Execs can book Business while your field team can book Premium Economy. NYC is pricier than Boise, especially during a conference. Look for a solution that lets you 'set and forget' it with bookings made for specific travelers, locations, etc.
- It can calculate a fair market price for each search depending on location, dates, etc. while still considering lower static costs you've set as part of your policy**

By showing fair pricing within each search, you empower travelers to make responsible spending decisions.
- It offers a variety of filters to use on search results**

Think price, flight time of day, hotel distance, review score, airline alliances or loyalty programs, etc.
- It pulls in inventory from various technology integrators**

Look for solutions that offer direct airline inventory along with consumer aggregators such as Expedia and hotels.com.
- It matches supplier-direct pricing while also layering in heavily discounted corporate and consumer rates**

No markups + big discounts = cost savings.
- It gives travelers the option to book with their preferred suppliers and gain loyalty points**

Traveler profiles allow employees to input loyalty club numbers, for instance, helping them easily sort according to preferred providers.
- It allows office managers, EAs, or recruiters to easily book and manage others' trips**

Trust us – the bookers and bookees will thank you.



Visibility & Scalability

CHECK IN

The only way to get a foothold over travel spend is to see where it's going, know who's spending how much where, and analyze trends so you can make more informed decisions moving forward. Gaining visibility into the many facets of business travel operations offers advantages as you work to corral costs. As a result, you'll grow your business more — and your solution should be capable of scaling alongside you.

- ❑ **It offers visibility into each individual traveler's spend and allows you to track across departments and cost centers**
 Taking a closer look at the company's top savers and spenders will help you plan and allocate more effectively.
- ❑ **It offers visibility into your travelers' upcoming and past trip itineraries**
 If you ever need to, you should be able to access the specific details of every single business trip.
- ❑ **It provides Duty of Care by showing you where all your travelers are and enabling you to get in touch with them at any given time, no matter where they are**
 In case of a natural disaster or other emergency, you should be able to instantly locate and contact all travelers to ensure their safety.
- ❑ **It offers real-time dashboards that show you the info most important to you**
 For instance, see how much your company is saving, who your top saving travelers are, which departments are spending the most, or which suppliers are booked the most, and make better decisions down the road based on what you see over time.

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Visibility & Scalability



- It offers robust reporting capabilities**

We suggest something that lets you customize and pull the specific reports you need (think of what these are prior to evaluating), and identify trends so you can make data-driven decisions and adjust travel policies to be more effective.
- It helps identify KPIs that will most effectively measure the org's travel policy**

Our recommendation is to at the very least track 1. overall spend and if it's within budget, and 2. traveler adoption rates.
- It tracks and visualizes your company's travel spend data**

By accessing all of this information in one place, you'll have what you need to make intelligent updates to policies and programs.
- It's easy to setup and train multiple designated admins with certain privileges depending on role**

For example, while they may require higher-level access, recruiters and EAs should have different permissions than those in Accounting.
- It supports admins and travelers as you grow and scale – at home and around the world**

A solution that offers all of your reporting into one backend and support teams located around the world will simplify bookings and support as your organization expands or does more business.



Traveler experience

CHECK IN

After putting the right permissions and perimeters in place, you should be able to trust your travelers to do the right thing and treat company money as their own. Encourage high adoption by making the process and experience as easy and flexible as possible, ultimately putting people before rigid or outdated policies and tools.

- ❑ **It makes traveler experience a priority without sacrificing cost considerations**
You shouldn't have to choose between your employees and your bottom line.
- ❑ **It surfaces personalized booking options for each traveler**
By leveraging machine learning to surface more personalized and relevant search results, your solution should make it easier (read: faster) for employees to making a booking and get back to their jobs.
- ❑ **It offers around-the-clock proactive agency support**
Our survey data shows that 64% of business travelers feel they're left to fend for themselves when something goes wrong on the road – 24/7 global support ensures your employees won't ever feel that way.
- ❑ **It offers a user experience that's similar to consumer sites**
To maximize adoption, your corporate travel solution should provide an experience on-par with the consumer tools employees are accustomed to using.
- ❑ **It lets travelers receive support through a variety of channels**
Empower employees to communicate whichever way is easiest, whether through in-app chat while on the go or email at home.
- ❑ **It lets employees set up individual traveler profiles with personal preferences**
Help employees book in policy while still taking loyalty club memberships, seat preferences, passport info, and more into account.
- ❑ **It comes with an easy-to-use mobile app**
From messaging to email to expense reporting, employees have gotten used to doing almost everything via their phones.



No matter your departmental priorities or overarching business goals, the decision to implement a corporate travel program should be approached thoughtfully and strategically. With the above checklist by your side, you and your travelers will be well on your way to enjoying an effective program in no time.

Learn more about how to select and implement an effective managed travel program for your business with TripActions.

Lets go.