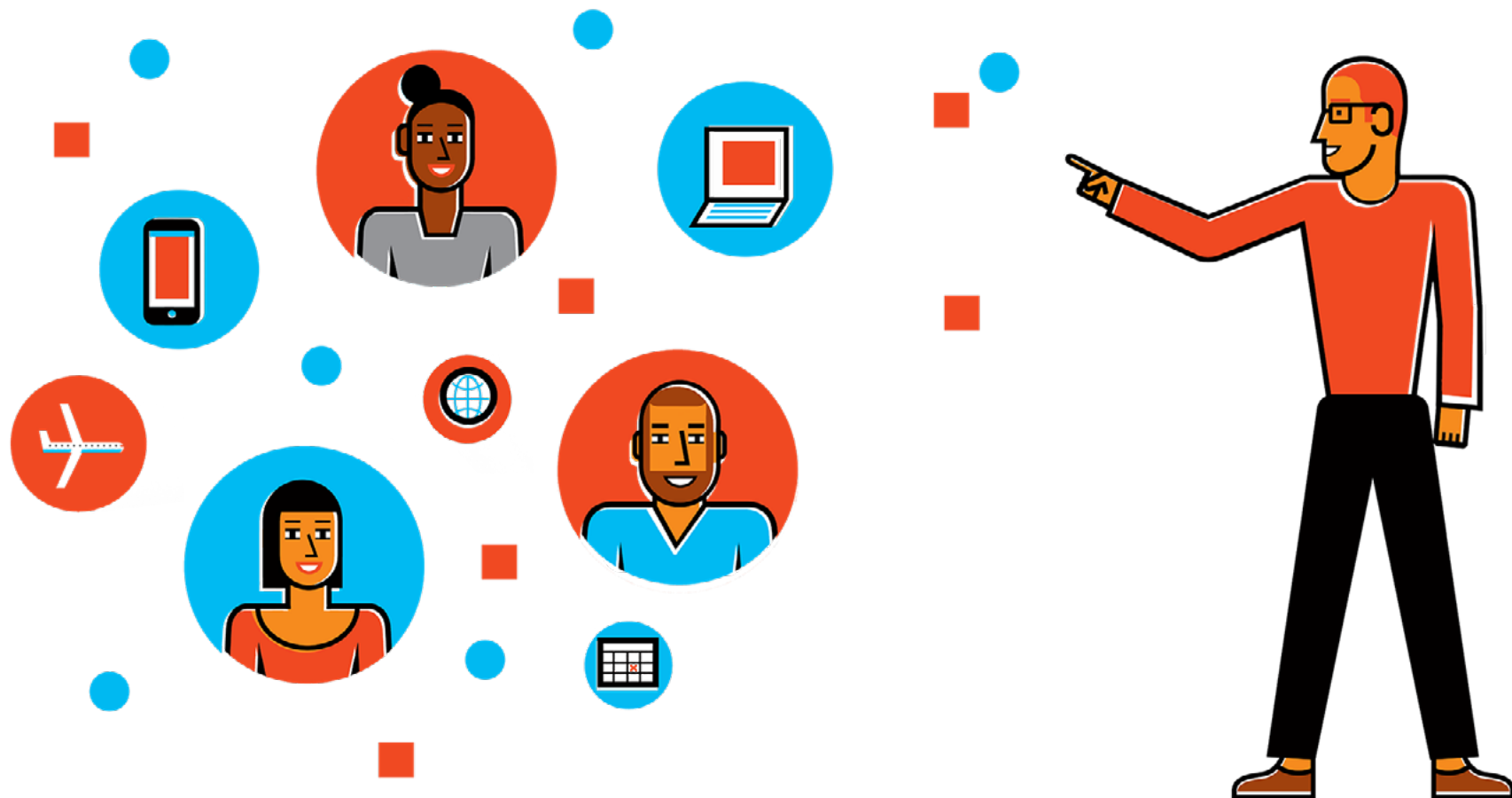




PRESENTATION WORKBOOK:

Make Your Business Case for a Corporate Travel Program Upgrade

After assessing the challenges posed by your organization's current travel solution and doing your due diligence around how to solve them, you've come to the conclusion that it's time for an upgrade. Now, it's simply a matter of getting your key stakeholders on board, too.

As a bonus to our full-length [Guide To Making A Business Case For A Corporate Travel Program Upgrade](#), we've created this easy-to-use workbook, complete with examples, to direct you step-by-step in building your effective deck and presentation.



HOW TO USE:

Read through each section and fill in corresponding blanks with the responses that make the most sense for your organization. This workbook will provide you with all you need to create your own branded presentation deck in Google Slides, PPT, or whichever tool your business utilizes.

#1 Define Your Program Upgrade Goals

Which business problems do you want to solve, and what specific goals do you want to achieve by implementing a new solution? How will you know when you've met your objectives? In today's data-driven world, being up front with how you'll measure progress against each goal will significantly strengthen your case. Remember to confer with key stakeholders across the organization to gather corporate travel-related pain points across finance, HR, procurement, and other impacted teams.

For each challenge currently faced, propose your objective for change along with measurable KPIs to prove success:

CHALLENGE 1: Low traveler adoption

IMPACT:(S) No visibility into travel spend;
Inability to fulfill duty of care obligations

OBJECTIVE #1: A. Improve the traveler
experience, and B. drive more program
adoption.

KPI: Percentage increase of employees
using the provided booking tool.

CHALLENGE 2: _____

IMPACT:(S) _____

OBJECTIVE #2: _____

KPI: _____

CHALLENGE 3: _____

IMPACT:(S) _____

OBJECTIVE #3: _____

KPI: _____

Come prepared to talk through how each challenge impacts your organization. With the first example above, for instance, not only does low adoption mean zero visibility into spend and behavioral trends, it also means you're unable to provide duty of care in the case of an emergency.

#2 Outline 2-3 Potential Vendors (With Your Top One in Mind)

By identifying the key business problems stemming from your current program, talking to stakeholders about their needs, and outlining a features and functionality wishlist, you should be able to identify potential solutions that align with your corporate travel upgrade goals. Beyond your top recommendation, you should come to the table ready to discuss an alternative or two (and why they are not your top choice).

For example, one vendor might integrate with your existing finance software, but doesn't come with a mobile app to simplify the traveler experience. It's important to show that you've done your homework on the top players in case your committee comes ready to poke holes.

For each potential vendor, outline top strengths and any potential Achilles heels (time to launch, lack of 24/7 365 traveler support, lack of a global infrastructure, etc.):

VENDOR 1: _____

KEY STRENGTHS: _____

POTENTIAL CHALLENGES: _____

VENDOR 2: _____

KEY STRENGTHS: _____

POTENTIAL CHALLENGES: _____

VENDOR 3: _____

KEY STRENGTHS: _____

POTENTIAL CHALLENGES: _____

FINAL RECOMMENDATION: _____

Frame your recommendation by detailing how its strengths will help you and others across the organization solve the particular challenges covered at the beginning of your presentation. It can also be helpful to lean into customer proof — ask for references that best align with your business (company size, industry, use cases, etc.).

#3 Present Your Recommendation & Calculate Potential ROI

To help drive home the desired impact of a corporate travel program upgrade, you'll need to present the potential ROI your team can expect to come with your recommended solution.

Have concrete numbers ready to prove you've done your homework and are considering business impact first and foremost. In particular, at least as a starting point, we recommend determining the impact your upgrade would have on travel spend, employee productivity, employee satisfaction, and program adoption.

TRAVEL SPEND: **1)** Take your current annual travel spend, plus the overall program cost and total cost of bookings; **2)** Calculate annual spend minus what you expect to save with your upgrade (ex. 15% on \$200,000 = \$30,000 savings; \$170,000 annual spend), plus the new program cost and total cost of bookings; **3)** Estimate total expected savings - including program and booking fees - by subtracting the second calculation from the first.

Your total savings: _____

LOST PRODUCTIVITY COSTS: **1)** Take the avg mins it takes to book a trip plus avg mins spent on traveler support and multiply by the total number of trips taken; **2)** Figure out avg mins to book with the upgraded solution, plus avg mins spent on traveler support with the upgrade, multiplied by total number of trips; **3)** Subtract the latter by the former to calculate total productivity cost in minutes.

Your lost productivity cost: _____

TRAVELER SATISFACTION: There are two ways to calculate this: **1)** Compare the % of travelers who DO use the provided solution with % of travelers who adopt the upgraded solution on average; **2)** compare the NPS (net promotor score) of your current program and/or solution with that of your proposed upgrade.

Rate of satisfaction: _____

All three of these suggested ROI calculations might not carry the same weight within every organization. Before you prepare your presentation, think carefully about which metrics will matter the most and tailor your deck accordingly.

What to Know Before You Go: Our Top 5 Tips for Delivering an Effective Presentation



1. Prep your decision makers with all the right documentation, information, and the agenda.



4. Specify your proposed timeline and action items at the end of your meeting.



2. Keep your presentation short and focused, leaving time for Q&A.



5. Send a followup email that summarizes your presentation and clearly lays out any decisions made in the meeting and next steps for each attendee.



3. Don't read directly from your slides. Instead, use the slides as supplements or evidence for your talk track.

With our full [Guide To Making A Business Case For A Corporate Travel Program Upgrade](#) and this step-by-step presentation workbook in tow, you now have everything you need to go forth and make your rock-solid business case for a travel program upgrade.

At TripActions, we believe being there in person is powerful. It enables employees to build relationships, close deals and drive growth. Fast becoming the default for corporate travel, TripActions is the modern business travel platform that combines the latest AI-driven technologies with unrivaled flight, lodging and rental car choice and 24x7 365 live human support to delight employees, finance leaders and travel managers alike—all while empowering organizations to seize travel as a strategic lever for growth.

Delivered within a powerful, easy-to-use mobile-first interface, TripActions helps over 2,000 customers globally—including WeWork, Aston Martin, Lyft, Expensify, SurveyMonkey, Sara Lee Frozen Bakery and the ACLU—reduce average booking time from 60 minutes down to six while achieving an unprecedented 90% traveler adoption, 93% traveler satisfaction and up to 34% savings on lodging alone.

The future of business travel has arrived. Power your organization's growth and delight your employees with TripActions. Let's go! Learn more at tripactions.com or on the [TripActions blog](#).

