

Travel Program **HEALTH CHECKLIST**





TRAVEL PROGRAM HEALTH CHECKLIST

This checklist was created to help you measure the strength of your program as you continue to grow your business. It will guide you through some of the most important areas in your travel program – travel policy, program savings, technology & innovation, and traveler experience.

By taking an in-depth look at these key categories, you'll be able to see where you need to focus your energy as you work to reach your goals.

HOW TO USE THIS CHECKLIST

Put a checkmark next to each statement your current travel program fulfills. If you see there are significant gaps in any given category, consider setting goals and objectives to close those gaps – attend local industry meetings, learn from key service and technology providers, and connect with colleagues across the industry with similar challenges.



TRAVEL POLICY



PROGRAM SAVINGS



TECHNOLOGY & INNOVATION



TRAVELER EXPERIENCE





TRAVEL POLICY

My organization's travel policy...

INDUSTRY TRENDS

- ☐ Is a competitive retention and recruitment tool.
- ☐ Considers reimbursing travelers for things that make travel easier and more comfortable (TSA Pre✓, airport lounges and more).
- ☐ Rewards frequent travelers with special benefits (work from home time or PTO in exchange for non-work hour travel).

ORGANIZATIONAL EFFECTIVENESS

- ☐ Aligns with our organizational culture.
- ☐ Matches travel program and business objectives and goals.
- ☐ Finds a balance between a traveler-first mindset and cost savings.
- ☐ Receives updates on a yearly basis.

TRAVELER EXPERIENCE

- ☐ Addresses C-Suite travel needs separately from other employees.
- ☐ Applies special considerations for VIP and executive travelers and identifies who can qualify.
- ☐ Provides guidance on extending business trips for pleasure, from booking to reimbursement procedures.

DUTY OF CARE

- ☐ Instructs travelers on how to maintain data security to prevent corporate fraud.
- ☐ Teaches travelers how to remove sensitive information from devices prior to a trip.
- ☐ Points travelers to the right resources in case of a crisis.
- ☐ Highlights additional duty of care precautions for minority groups.

USABILITY

- ☐ Is designed in digestible, readable formats for various channels (e.g. desktop, mobile).
- ☐ Is easy to find by employees.
- ☐ Is reinforced through on-demand training recordings, quality checks, resource center and more.



PROGRAM SAVINGS

My organization's travel program...

TECHNOLOGY

- ☐ Reviews the travel technology stack to ensure that the right solutions are in place to identify savings:
 - ☐ A messaging service to drive compliant behavior.
 - ☐ Price assurance tools for both air and hotel.
 - ☐ Gamification and rewards programs.
 - ☐ Automated contract optimization services.
 - ☐ Key programs to source, contract and manage meetings.

BEYOND THE BOOKING

- ☐ Uses a virtual pay process to simplify payment and reimbursement.
- ☐ Analyzes ancillary fees to understand spend beyond the booking.
- ☐ Recommends solutions to save on parking expense.
- ☐ Works with marketing & communications to develop an internal campaign to promote compliance.

RELATIONSHIP & SUPPLIER MANAGEMENT

- ☐ Practices continuous hotel sourcing.
- ☐ Renegotiates contracts to ensure the best rate (for the current year and the years to follow).
- ☐ Understands the supplier contact exclusions and evaluates the number of transactions that fall under those exclusions to determine contract fulfillment options.
- ☐ Reviews current car rental usage and compares for mileage reimbursement.
- ☐ Evaluates ways of aggregating, analyzing and reporting on shared economy vendors.





TECHNOLOGY & INNOVATION

My organization uses the following technology:

TRAVELER EXPERIENCE

- ☐ Dedicated Travel Portal
- ☐ Mobile Itinerary Management
- ☐ Automated Messaging
- ☐ Check-In Capability During Crisis
- ☐ Online Booking Tool
- ☐ Corporate Parking
- ☐ Virtual Cards
- ☐ Language & Culture Guide
- ☐ Gamification
- ☐ Universal Profile Tool
- ☐ Invoice Finder

TRAVEL MANAGER EXPERIENCE

- ☐ Customized Analytics Dashboards
- ☐ Duty of Care Platform
- ☐ Approval or Notification Workflow
- ☐ Virtual Cards
- ☐ Benchmark Scoring
- ☐ Traveler Friction Reports & Surveys

SAVINGS EXPERIENCE

- ☐ Air & Hotel Price Assurance
- ☐ Unused Ticket Management
- ☐ Automated Messaging
- ☐ Digital Supplier Notifications
- ☐ Trip Disruption Compensation



TRAVELER EXPERIENCE

My organization's travelers:

PRE-TRIP

- ☐ Know where to find information about the travel policy.
- ☐ Understand the booking options available to them.
- ☐ Can distinguish when to book online or with a travel advisor.
- ☐ Know how to update the profile that contains their personal information.
- ☐ Receive destination information before their departure.

ON-TRIP

- ☐ Can access their business travel plans on the go.
- ☐ Are able to easily manage receipts and submit expense reports on the go.
- ☐ Know how to get assistance outside of regular business hours.
- ☐ Feel supported when an emergency or unexpected event happens.
- ☐ Receive travel alerts while on the road.
- ☐ Understand company-approved apps to stay productive.
- ☐ Utilize wellness resources while traveling.

POST-TRIP

- ☐ Know how to easily locate digital receipts.
- ☐ Can easily locate lost invoices.
- ☐ Can efficiently submit expense reports using an expense tool.
- ☐ Share their feedback via post-trip surveys.
- ☐ Are kept aware of travel program updates until their next business trip.



Now that you've completed the health checklist, it's time to evaluate how your program is doing. What are you doing well? Where do you see gaps? How does your travel program stack up to other companies?

If you do see some opportunities to incorporate new elements into your travel program, use those indicators to influence your goals and objectives to ultimately reach corporate travel success.



Want to get more out of your Travel Program? Schedule time with a Direct Travel expert to see how your travel program stacks up against the industry.

REQUEST CONSULTATION

We have one mission – deliver all-encompassing, personalized programs adapted to every client we serve. As an empowered, client-focused company, Direct Travel offers business travel, meeting, events and vacation services in 190+ locations globally. We deliver a unique blend of high-quality solutions and adapted technologies, providing excellence across all touchpoints. Structured to respond to your needs with agility and advanced consultation, Direct Travel is the right fit to elevate your travel program.

