

Top 10 Implementations Best Practices

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Top 10 Best Practices for Implementing Your Corporate Travel Program

The Implementation Process is the foundation for a successful travel program. At Egencia, we've found that by following a series of best practices, companies can set the stage in these first, critical weeks to establish traveler adoption and compliance and meet their travel program goals.

In this Special Report, we'll cover best practices for creating a transition strategy, securing change management support, de-implementing your incumbent Travel Management Company, shaping a policy that mirrors your unique travel needs and corporate culture, and developing a seamless transition for travelers and arrangers.

1. Do Your Homework

Before you begin implementing your program, you will want to gather information to gain an accurate picture of your current corporate travel situation. These data points will help your new Travel Management Company work with you to create policy settings to set the stage for a successful new travel program.

Pre-Implementation Checklist:

- Hotel, car or air vendor agreements
- Your most recent travel policy
- Form of payment information such as a central bill card or individual credit card
- Identification of any traveler groups that may have different forms of payment
- Specific needs of your traveler groups such as VIPs
- Travel patterns such as key cities and routes, hotel per diems
- Traveler habits – do they book primary online or offline?
- How many employees are arranging travel for others? Who are they?
- How are other offices or divisions in your company currently managing travel?
- How is guest travel, travel for relocation, and recruitment travel handled?

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“One of the key factors in the successful launch of Egencia at LG Electronics was the support the program received from our CEO and the top executives. They really wanted the visibility, control and savings that were possible and were instrumental in fostering the right attitude within the company towards making the change.”

Steven Yu
LG Electronics

2. Assemble the Right Team

It is important to ensure you have an integrated team on your side to cover various responsibilities. Your core team will consist of the point person for day-to-day management of the Travel Program, cost-management, and the communications about the change.

Core Team

Responsibility	Typical positions within company
Day-to-day travel management and reporting (Travel Manager)	Varies
Cost-management and contracts	Procurement
Credit card administration and expense management	Finance
Launch communications and training	Marketing and/or Human Resources

Other key players for pieces of the change management process include a technical contact, other colleagues at your company implementing a new large-scale system or process, and your Executive Sponsor.

Auxiliary Team

Responsibility	Typical positions within company
Technical requirements and implementation for profile creation	Human Resources and/or IT
Change management lead	Varies
Traveler needs and unique requirements	“Roadwarrior” and VIP arrangers (e.g., Executive Admin)
Executive Sponsor to be the face of the change	CFO, CEO, or President

3. Have a Change Management Mindset

While the shift to a new Travel Management Company will likely offer your traveler community many new advantages, it's important to keep in mind that the change will also require your travelers and travel arrangers to modify behaviors that may have been ingrained in them over a long period of time. Develop a deep understanding of what this change will mean for those who travel and arrange travel by determining what current pain points will be addressed in your new program and what benefits they might be losing. Identify how the booking and payment process will change for travelers and where extra coaching will be required. This sense of “then vs. now” will be key in your traveler communications and training.

We also recommend reviewing the process from other company-wide systems that have recently been rolled out to your company such as a new benefits system or Customer Relationship Management (CRM) tool. These previous roll-outs could offer valuable learnings for what change management practices work well for your company culture and which ones do not.

Empower your travel program

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“The number one key to our success has been our communications and training tools for travelers. I’m a firm believer that you can’t offer too much training, or too many tools to help them. If you give your travelers the information they need, compliance becomes so much easier to achieve.”

Trina Redfeldt

J.R. Simplot

4. Smooth the Transition from Your Current Program

If you are currently using another travel management company, you’ll want to create a de-implementation plan.

- Inform your current Travel Management Company of your plans to move to a new partner and discuss a timeline for the transition.
- As a best practice, we recommend an overlap of 4-6 weeks between your incumbent and new Travel Management Company. This allows your travelers time to complete unused trips and redeem unused tickets. Work with the incumbent Travel Management Company to develop a plan to redeem unused tickets after the transition date.
- Consider leveraging the phone system with your incumbent Travel Management Company to spread the word about the change to a new Travel Management Company. This message could inform travelers about the new Travel Management Company and let them know the date of the transition. You might also direct them to your intranet for more information.
- Post on your intranet information regarding the transition to your new Travel Management Company such as a link to your new online booking tool or the telephone number.
- Download or obtain copies of all available reports with your incumbent Travel Management Company including unused ticket and in-progress travel reports.
- Encourage travelers to review the information in the current travel profile such as reward program numbers and credit cards prior to including them in their profile with the new Travel Management Company.

5. “Over-Communicate” the Change

Communication and employee involvement are imperative to successfully launching a new travel program. When mapping out a communications strategy, ensure that you tailor the plan to your company culture. Whether in the form of collateral, giveaways, posters, or company emails, it is important to create excitement about the potential of this new offering in a way that resonates with your company. Developing a theme that is consistent in all touch points is a great way to capture attention.

Interview key stakeholders and super-users early in the process to understand their concerns about the change. Ensure that your communications address these concerns. Repeat the key takeaways using a variety of formats, especially for those employees who will be most affected by the new travel program. Your Account Manager can work with your Marketing or HR representative to help build a communication plan that fits with your company culture.

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///DATATEL

“If you’re looking to move to a new travel program, take the time to identify and understand your goals, be collaborative across the company, and think big picture.”

Jane Roth
Datatel

6. Reinforce With Executive Endorsement

Leaders “know the way, show the way, and go the way”. Help your travelers and travel arrangers understand the importance of the change by ensuring your company’s leadership explains why this decision was made. Here are some of the ways to leverage your Executive Sponsor throughout the transition to drive awareness and compliance:

- Work with your Executive Sponsor to be the face of the change by announcing the new Travel Management Company via e-mail. He or she can send another communication at launch to reiterate the benefits and drive adoption.
- Consider creating a short video message with your Executive Sponsor to announce the change and benefits to travelers and the company. Play the video in your company’s common areas.
- Have key stakeholders speak about the new Travel Management Program in company and department meetings.
- Include a cover letter in the front of your travel policy to reinforce the Executive endorsement.

7. Make Training Relevant

Training helps travelers and arrangers feel empowered to navigate the new booking process. For the greatest impact, consider offering a mix of in-person, web training, and recorded videos. Offering numerous training options that are customized to your travel program and combined with an incentive, such as breakfast or lunch, will help keep attendance high. You might consider staggering the training calendar so that several sessions are offered after the launch of the new Travel Management Company. For many travelers, training might not be top of mind until the new online tool is in use. Another best practice is to offer an advanced user class post-launch that highlights tips and tricks for road warriors or arrangers.

8. Maintain Momentum

It is important to launch your program soon after your implementation is complete. Capitalize on the “buzz” surrounding this change to get as many employees to try out the tool for themselves.

As you are rolling out your program, listen to feedback from employees and react. Remember that this change may be more challenging for some than others. By implementing a feedback process, you can make adjustments and more quickly gain traveler acceptance.

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“We’ve even been able to negotiate an additional 12-15 percent savings from our preferred rental car provider using the data provided in Egencia reporting.”

Jason Mefford
Ventura Foods LLC

9. Set Your Policy for Success

Implementing a new Travel Program is an ideal time to take a fresh look at your policy. The most successful companies do not implement the strictest policy settings immediately but do so in a gradual way. Closely monitor your new program for cost-savings and refine your policy as needed, once your traveler community becomes more comfortable with the new procedures. Leverage reporting to monitor the following:

Several weeks after launch, take a closer look at your new program and identify further cost-savings opportunities.

1. Consider leveraging the buying power of your Travel Management Company to supplement your hotel and air negotiated programs. This is a great way to drive cost-savings in your smaller markets or to reduce the manpower required to maintain negotiated contracts.
2. You might also consider implementing a pre-trip approval process. When pre-approval has been set up, an e-mail is sent to a designated person within the company to approve a pending travel request. If approved, the booking is made. If the approver denies the travel request, an e-mail is sent back to the traveler notifying them.
3. Post a link to the corporate travel policy on your corporate travel home page and online booking tool will allow travelers to review the policy while making bookings.
4. If you are not already utilizing reason codes for out of policy purchases, consider taking this step. Reason codes offer insight as to why travelers are making choices outside of the recommend policy and can illuminate next steps for cost-savings. Some of the ways companies action this data are to:
 - Work with their preferred suppliers to improve their rate agreements, if reporting shows that travelers are not receiving the expected rates
 - Adjust city specific hotel per diems, if travelers are unable to stay within the current threshold

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“Leverage your account manager and the expert advice they can offer. If you combine your insight with their expertise you will be able to reach your goals much sooner than if you simply go it alone.”

Sibu Thomas
eClinicalWorks

10. Leverage your New Travel Management Partner

Your new Travel Management Company is your greatest ally in the change management process. They are able to recognize trends in the marketplace and recommend best practices. Some of the ways you can lean on your Implementation and Account Management teams for support include:

- Guidance on revising a travel policy
- Benchmarking data such as hotel per diems
- Recommendations on communicating the change to your travelers
- Traveler training support and guidance
- Best practices for gaining visibility into your travel program with reporting

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