THE ROAD TO A SUCCESSFUL TRAVEL POLICY

START

SET GENERAL GUIDELINES

- Design booking processes (how to book/amend/cancel, out of hours)
- Set up payment terms
- Issue expense guidelines (link to full T&E guidance)
- Determine approval processes
- Decide cash advance procedures
- Create traveller profiles
- Set out non-employee travel guidelines (contractors, interviewees, relocation, clients, spouse/family
- Decide if personal/leisure travel bookings are in scope
- Consider business travel insurance
- Check health requirements (vaccinations, etc.)
- Include country security/safety guidance
- Establish key contacts
- Embed sustainability goals

AIR

- Class of service criteria
- Preferred vendors v mandated carriers
- Rules (same carrier for return leg, split ticketing, restricted v unrestricted tickets)
- Flight selection criteria (time window, lowest logical fare, lowest fare on the day, specific carriers)
- Revenue v non-revenue generating travel
- Insurance/risk management (numbers/levels of employees per flight)
- Weekend travel
- Additional costs (baggage, seat allocation, priority boarding)
- Upgrades
- Regional guidance

HOTEL

- Hotel selection criteria (hotel programme, hotel brands/ chains, hotel classification, distance from destination, total cost of trip)
- Link to hotel directory= manage deals/costs/satisfaction/risk
- Non-preferred properties (per diem, expense guidelines)
- Long-term stays (corporate apartments, specific hotels)
- Day rooms
- Cancellation policy
- Weekend stays
- Incidental expenses (laundry, etc.)
- Alternatives (stay with friend)

CAR RENTAL

- Preferred suppliers
- Car class eligibility
- Refuelling
- Insurance
- CDP and other code identifiers
- Booking direct v via TMC
- Vendor gold card/privilege memberships

RAIL & GROUND TRANSPORTATION

- Class of service (domestic, international)
- Booking procedures
- Seat reservations
- Eurostar/regional variations
- Airport rail v ground transportation
- Use of taxis/black cars/public transport (home, airport, destination)
- Personal car usage (mileage rates, insurance, etc.)

FINISH

You have a successful policy!

Go back to the start to review

Carlson Wagonlit Travel