



## Time to Select a New TMC. Now What?

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BEST PRACTICES FOR MANAGING CHANGE IN CORPORATE TRAVEL PROGRAMS



# The decision has been made

to search for a new global travel management company (TMC). What lies ahead is a period of RFPs, meetings, negotiations, and contract revisions to select a new global travel management company, or companies, that is certain to revolutionize how your multi-national business coordinates travel. You've taken the first step.

## CONGRATULATIONS.

You begin laying the groundwork for a plan that delivers greater savings through operational and contractual improvements as well as financial transparency. At the same time, your busy travelers continue to book tickets and jet across the globe—in ways that may soon radically need to change. Your team and your chosen travel management company will be responsible for implementing a new travel strategy, but the ultimate success of your program lies with your travelers, who can either adopt the new standards and guidelines set or resist change and fail to adhere to the new program.

How do you ensure success? By proactively and methodically managing all the changes that are required to launch your new global travel program.

The business definition of change management is “minimizing resistance to organizational change through involvement of key players and stakeholders.” But anecdotally, it’s more accurately described as “getting everyone on board and excited.”

So what are the best practices to apply to ensure a path to successful adoption of your new travel strategy? This white paper reviews several key areas on which to focus initiatives to manage the coming changes—and ultimately launch and supervise a successful global travel program.



### Creating a Cross-Functional Team

Select and empower your team by thinking far and wide. Identify thought leaders and influencers in these categories:

#### II GEOGRAPHY

Go beyond the country of your organization’s headquarters. If your effort is being managed out of the U.S. offices, include representatives from other regions. Even if 80% of your travel is between major cities, still include a member that regularly travels to secondary or tertiary markets.

#### II ORGANIZATIONAL LEVEL

Include a mix of senior leaders, mid-level managers and junior staff. Get insight into their needs as they book travel. Also, don’t forget to include an executive assistant who books the travel of your most senior staff—and who may ultimately be the travel “power user.”

#### II BUSINESS UNITS/ DEPARTMENTS

Although the travel and/or procurement team is driving the process, consider end-users. Include other departments and business units including sales, training, service, marketing, operations, and IT.

#### II TRAVEL FREQUENCY

Road warriors who travel often are used to change and will adapt. What about teams that travel only once or twice a year? Include a mix of users.



## Influence with Informed, Invested and Strategically Placed Stakeholders

Your first step to improving your travel program should actually take place several months before the TMC selection. When first considering a change, the best thing an organization can do is secure participation—and the investment of time and effort—from all corners of the company to build a business case with projected savings and ROI. You'll ensure that viewpoints of everyone in the company are considered throughout the process, and the business case can serve as a benchmarking tool along the way.

Too often, a small team based in one region starts the process of sourcing a new travel program without considering the impact on other regions or business units. The team leading the effort may not be aware of unique cultural or regional issues across borders or the particular needs of a specific business unit.

The RFP requirements present a prime opportunity to identify thought leaders in various regions and business units and get their input. Not only will the RFP and TMC review process be more complete with the guidance from these individuals, but you will also have a team that has been invested in the program from the very beginning and will be motivated to facilitate its success once it goes live.



## Actively Engage in 'Discovery'

The TMC account management team's first priority is a deep-dive into your business, or the "discovery" phase. This begins during the RFP submission process and continues through implementation. During the discovery phase, the deliverables and criteria for the program's success are determined and expectations are set.

Look for a TMC that takes the time to really understand your program's particular goals, not one who provides a cookie-cutter RFP. The tougher the questions, the more precise a TMC's response to your RFP and the more solid the subsequent execution.

Consider the time it takes from the decision to reevaluate your travel program through requesting proposals and then making a final TMC selection. It is not uncommon for business needs and travel trends to

change during the process. That is why it is so important to match selection with final program development.

Some key steps and questions to address include identifying why your organization is making the change, what's important in the travel program for each audience, and then developing metrics and key performance indicators (KPIs) to measure and determine success. Once these parameters are defined, your team can take a fresh look at technology selection and data integration points to build a methodical rollout plan.

For example, an initial goal may have been to push all travel bookings to an online tool; however, during the discovery phase a significant amount of travel taking place in India is found (perhaps due to a new acquisition in that area). Based on this knowledge, the decision to move forward and impose an online booking tool could be reexamined. Online booking tends to be significantly more expensive than offline booking in India. In the end, you may elect to take a phased approach and consolidate India-based travel after other regions have been implemented.

The bottom line is that the discovery phase is an opportunity to make sure the implementation of your global travel program will support the best interests of your business by leveraging the global implementation experience and capabilities of your travel management company.



## Refresh Your Travel Policies and Procedures

Implementation of a new travel program presents the occasion to verify that travel policies and procedures are not merely updated but are also reviewed and aligned with changing business and available travel technologies.

Perhaps you are moving from a regional program to a globally-managed program and policy specifies that travelers not use private car services, only generic taxis. However, as you consider the impact on traveling in less-developed countries, this guideline may present a safety and security issue for corporate travelers. The review process considers such a situation and adjusts policies accordingly.

## QUESTIONS TO ASK DURING TRAVEL POLICY REVIEW

**1** Will your travel policies apply globally, or are they based on common practices in one region (e.g. United States) which may not be applicable in others (e.g. Asia)?

**2** How is compliance measured? Is it based on self-reporting or is there automated reporting? What tools are needed to measure adherence to the program?

**3** What is the targeted compliance level? Consider any potential roadblocks that may prevent meeting that level and address them accordingly.

**4** Do policies account for travel management technology—both current and what may change (e.g. mobile devices, tablet computers, etc.)? Are they flexible enough to accommodate future innovations?

**5** Do the policies reflect current pricing and travel trends? Consider “add-ons” such as WiFi access or preferred airline seating and make sure policy updating is flexible and effective to give guidance to your travelers in selecting these services.

**6** Do policies in travel align with stakeholder departments? For example, corporate credit card guidelines should be in alignment with authorized departments (Finance, Procurement, etc).

This is also an opportunity to build future savings into updated policies. For example, mandating all tickets be booked as non-refundable can bring substantial savings, even accounting for change fees expenses.

Other areas to consider during this policy review process include compliance and reporting, technology differences among regions and changes in travel trends, such as the rise of travel fees imposed by airlines for checked bags.



### Create Thorough and Compelling Employee Communications

If your HR or communications department has an internal communications person, now is the time to build a strong relationship.

With significant changes coming in the way you manage corporate travel, you will need to make sure you clearly communicate those changes with everyone throughout the company. The key is to create a comprehensive, integrated communications campaign that not only reaches all necessary employees but also touches them multiple times in varying formats. Don't hesitate to enlist the help of your new global TMC in building the most effective communications.

### //SEGMENT AND DEFINE YOUR AUDIENCES

VIPs, road-warriors, occasional travelers and executive assistants have different travel booking needs. That is why it is important to compile a comprehensive list of the people to reach and what they need to know—and make sure to address the “What's In It For Me” factor. From automated travel approval to mobile applications and beyond, each group has to have a reason to care about this new program, and your job is to tell them how they will benefit from the program changes.

### //PLAN FOR MULTIPLE TOUCH POINTS

A 2009 study found that the average email user receives more than 160 emails per day<sup>1</sup>. With all of that information pouring into the inbox, don't count on one e-mail to do the job. Make sure you have multiple touch points to communicate the changes that are coming to the company's travel policies and procedures.

You will need to communicate several messages, including those announcing the new program, illustrating key benefits and new tools to be set in place, offering full instructions and training on travel profiles and/or tools, and outlining when and how to start using the service.

<sup>1</sup>[http://business.timesonline.co.uk/tol/business/related\\_reports/business\\_solutions/article5961397.ece](http://business.timesonline.co.uk/tol/business/related_reports/business_solutions/article5961397.ece)

Beyond email, look for other opportunities to introduce the program. For example, consider these options:

- Internal media such as welcome monitors in lobby areas, paycheck stuffers and the company intranet
- Posters and flyers in frequently-traveled areas such as break rooms or vending machines
- Company newsletters
- Company-wide webinars to provide training
- Incentives and contests

### // LEVERAGE YOUR CROSS-FUNCTIONAL TEAM

Remember that cross-functional team you brought together for the RFP and vendor review? These are now the most informed people in the process and can be turned into change management evangelists. Arm this team with the information you need to disseminate and include them in your plans. Identify them as local experts that others can turn to and ask them to take the lead on trainings and presentations or personal e-mails to their divisions about the pending change.

This group has a vested stake in the process because of their early involvement. They are the perfect group to spread your communications and add an authoritative voice to the process.

### // ASK YOUR TMC FOR HELP

Your TMC has been through this process before. Ask your global account manager what they have seen work for companies like yours and if they have prepared materials. Take advantage of their expertise and materials to make your job easier.



### Make Training a Priority

New booking tools, policies and travel options have the potential to confuse travelers—and derail the implementation of your new travel program. As mentioned in the previous section, you need to thoroughly communicate to everyone about the pending changes. However, beyond “what is coming,” you also need to educate about “what to do.”

## Overlooked Internal Tools to Communicate Change

■ **EMAIL SIGNATURE** > add a tagline that reminds staff of the new program launch date or a link to more information

■ **COMPANY INTRANET** > create a landing page that lists program benefits and FAQs

■ **STAFF NEWSLETTERS** > include articles and updates in regularly scheduled distributions

■ **REFERENCE SHEET** > prepare a document for managers to review during their staff meetings

■ **MEETING AGENDAS** > include program updates for quarterly staff meetings

■ **INTERNAL SOCIAL MEDIA** > don't forget tools such as Yammer, your LinkedIn company page, wikis, or internal blogs

You and your TMC should plan several training opportunities and make them a priority for key audiences to attend. For busy sales teams, attend the monthly staff meeting or conference call to deliver direct training. For casual travelers, schedule a training session with lunch provided to encourage participation. And for executive assistants who do lots of travel bookings for the senior leadership, conduct small group-intensive training sessions.

While in-person training is best, you won't be able to reach everyone with a live presentation. For that reason, it is important to provide training in multiple formats. Use a screen capture software package to record a webinar to be posted on your organization's staff site so people can watch on their own schedule. Create a “how-to” guide and other documentation that can be saved on shared network drives and distributed through division and department managers.

Not enough manpower? Ask your TMC for support in the creation of these training materials.

## Don't Forget HR—Hires, Promotions and Transfers

According to the US Bureau of Labor Statistics, U.S.-based companies have an employee turnover rate of over 3% annually. Adding in promotions and department changes, this means that your company will have more workers signing up for your travel program on an ongoing basis.

Make it easy to train these new travelers by preparing a Travel Welcome Kit for HR that includes training, policies and procedures.

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## Phased Implementations

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For larger corporate programs—either regional or global—an implementation rollout strategy may make the most sense. As each market or regional program is completed, there's an opportunity to review what worked really well in employee adoption and what could be improved before the next phase of implementation. Engage your stakeholder group for this feedback as well. As painful as it might be to hear negative feedback, having the chance to fix it “on the fly” is worthwhile.

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## Assess and Close the Loop

After everyone has been informed, trained and the program has gone live, it may be tempting to think your work is done. However, there is one final important step—to measure how things went and how your new program is performing.

Start with a post-launch user survey. Check in with your travelers and key audiences to make sure they received everything they needed during the implementation process and assess how well-informed they felt throughout the process. This will indicate whether you are on the right path or if additional training is needed.

Take a close look at your incoming data and audit travel operations. Are you meeting the compliance levels established during the discovery phase? Is the data you are collecting complete and does it meet established quality standards? What you find through this initial audit may indicate that additional tools and processes need to be deployed or that supplementary training may be useful to further educate your organization on the new policies.

The most important component of this process is to share the results. Use the same communications channels that announced the program to inform your company about its success or needed improvements. Whether your goal is improved traveler satisfaction, increased savings or consolidated supplier agreements, keep everyone informed so they know their role in the process and how their efforts contributed to the results.



## Conclusion: Managing Change is Managing Expectations—Communicate, Communicate, Communicate!

Properly managing the changes involved in implementing a global corporate travel program boil down to a few key points:

- Define Measures of Success
- Communicate and Educate
- Manage Expectations

With proper planning, implementing a new travel program doesn't need to be disruptive or chaotic. The more proactive you are in the approach, the better results of the program; e.g., employee adoption and compliance. Identify key individuals within your organization who need to know specific information, figure out what they need to know (and why they need to care), target communications, and measure results.

Post-implementation, your global corporate travelers will not only have access to new tools and travel options that improve their experience, but will also be generating savings for your company and properly following the policies and procedures you have established.

RADIUS wishes you success!

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