Successfully Coordinating Travel Arrangements for Your Team

Mindsets Admins Need for Travel Planning

With travel…

❖ Nothing is ever set in stone
❖ All elements of the trip are always subject to change
❖ Always think about contingencies before you book the travel
❖ You must always be the one to remain calm under pressure, delays, cancelled flights, frustrated executives…
Mindsets Admins Need for Travel Planning

With travel…
- Know what tools exist to accomplish the job
- Know when to ask for help (international, complex itineraries)
- Understand expectations and identify your travelers wants and needs

Best Practices

- Develop a long term relationship with a local travel agency affiliated with a national brand
- Know your company travel policies
- Know your company’s preferred suppliers
- Develop standard forms and templates to make your job easier
Benefits of Using a Travel Agent

Working with an agent provides…
- Extensive industry knowledge
- Time to research exactly what you need
- Access to discounts and inventory you don’t have
- Access to additional services you don’t have

Benefits of Using A Travel Agent

- Agencies can administer your corporate travel policy
- Agencies can maintain profile data for each traveler
  - Loyalty programs
  - Preferences
  - Emergency contacts
  - Unused tickets, refunds, etc.
Benefits of Using a Travel Agent

✧ Agencies have preferred supplier leverage
✧ Agencies can provide consolidated reporting
✧ Agents have access to multiple inventory sources
✧ Agents have extensive destination knowledge
✧ Agents are experienced with the fine print

My Bottom Line on Travel Agents

✧ You may pay a fee for each ticket you book, but travel agents have saved me and my clients thousands and thousands of dollars throughout my travel planning career. The booking fees are so minor compared to the value a good travel agent will provide you!
Know Your Company Travel Policies

- Read your corporate travel policy for yourself – word for word
- Know who can fly 1st class and who cannot
- Know if you can book multiple executives on the same flights

Know Your Company’s Preferred Suppliers

- If you have preferred suppliers for travel, make sure you know them
  - Car Service
  - Rental Cars
  - Airlines
  - Hotels
  - Travel Agencies
Develop Standard Travel Forms/Templates

Every admin who coordinates travel needs:
- Traveler Profile Form
- Travel Arrangement Form (for intake)
- Travel Itinerary Template
- Trade Show Event Details Template

Traveler Profile Form

- All vital information for your traveler
- Cost Center/Accounting Info
- Frequent Flier Numbers & Status
- Seating Preferences
- Meal Requests
- Car Rental Preferences
- Hotel Preferences
- Passport Info
Travel Arrangement Form

Form should include info regarding:

- Flights (private and/or commercial)
- Car Service
- Hotel Reservations
- Meal Reservations
- Other basic meeting planning details

Use it as a planning worksheet to capture info needed to make the travel plans.

Travel Arrangement Form

Top right includes info for the traveler, dates of travel, type of meeting, and location.

Top left includes check boxes and blanks for tracking which details you’ve arranged and when.

Keep multiple blank copies in a folder on your desktop for quick use.

Color code your copies for each executive (e.g. exec #1 in yellow; exec #2 in green; exec #3 in blue)

Use this info to create the travel itinerary.
Travel Itinerary Template

- Don’t ask your executive if they want a travel itinerary – JUST DO IT!
- Saves time and hassle searching for information
- Gives the traveler a one stop shop for all of the details of their trip
- Makes a great document to leave with family members while they are traveling

Tips for Creating a Travel Itinerary

- Think CHRONOLOGICALLY to determine what you need to include
- Update the itinerary in the same order each time till it’s habit / so you don’t overlook vital info
  - Header
  - Airline
  - Ground Transportation
  - Hotel
  - Meeting Information
  - Driving Directions
Other Travel Itinerary Use Tips

- Proof read. PROOF read. PROOF READ!
- Save ALL travel itineraries for reuse later
- Create a standard naming mechanism for your itinerary files
- Print a copy for your exec AND for yourself and keep it with you at all times during their travel

Trade Show Event Details Template

- General Info
  - Key company/team contact info
  - Flight and hotel info for attendees
- Booth Info
  - Type of booth
  - Setup/Move-in Info
  - Exhibit hours
  - Items shipped in advance
  - Booth tear down info
  - Booth pack up checklist
  - Booth shipping info
Website Resources

**Corporate:** RESX, GetThere, Cliqbook, Rearden Commerce

**Online Agency:** Expedia, Travelocity, Travelleaders.com, Orbitz, CheapTickets, Hotels.com, Hotwire, CruiseHolidays, etc.

**Aggregator Sites:** Kayak / Sidestep, Cheapflights, BookingBuddy, etc.

**Supplier Sites:** United, American, Carnival, Marriott, Hertz, etc.

Website Resources

- www.seatguru.com
- www.flightstats.com
- http://www.countrycode.org
- www.timeanddate.com
- www.frommers.com
Website Resources

- www.tripit.com
- www.oagtravel.com
- http://www.independenttraveler.com/resources/
- www.aaa.com

Other Travel Tips

- Always confirm the STATE of the city your traveler is requesting travel for
- Always run the confirmed itinerary by your traveler AS SOON AS you have it available (even if the travel is weeks away)
- Research restaurants and activities in the area during your traveler’s stay
- Prepare driving directions/maps for all to/from points on the itinerary even if they have GPS
Other Travel Questions?

Submit your travel questions to me at AdminSuccess@AllThingsAdmin.com

If we don’t know the answer, we’ll figure it out and let you know!

Connect with Julie Perrine online

✦ Connect with me!  http://www.linkedin.com/in/julieperrine

✦ Follow me!  www.twitter.com/julieperrine

✦ Friend me!  www.facebook.com/julieperrine

✦ Visit my blog!  www.julieperrine.com/blog