*expert*technology

Checklist for your Technology Upgrade

Your guide to transforming your travel program with Corporate Traveller's Expert Technology.

Prepare for Digital Transformation

Technology is designed to make our lives easier; we want simplicity and efficiency, and technology often delivers. Where it can be challenging, though, is during the transformation process. When moving from a legacy procedure to a new digital platform, there can be uncertainty about the unknown and resistance to change.

That's where our guide to preparing for digital transformation comes in. Our Checklist for Change will step you through the seamless process of implementing Corporate Traveller's online booking tools and prepare your business for the changes that come with it. Simplicity, efficiency and money saving are the key benefits you should be getting from your travel technology.

What is a digital transformation?

A digital transformation is all about implementing technology to make a process or system easier. A digital transformation of your travel booking process might mean moving all your bookings into one online platform. It might seem like a lengthy and costly process, but it really doesn't have to be, and will actually save you time and money in the long run.

Why should you transition your travel booking process to a tech-based system?

Apart from the obvious reasons – to save time and money – technology is the way of the future and the digital capabilities we already have at hand make life so much easier. Given this, why would you not undergo a digital transformation?

When is the best time to transition?

There is no time like the present and with a seamless transformation process, there's no reason why you should wait; you don't need to wait until the start of the next Financial Year or a low travel period to begin the transition process.

Who should be involved in the process?

A project manager should lead the process, but if you're one of the decision makers, someone who books travel or you're a traveller within your organisation, then you'll also have some level of involvement in the digital transformation process. But we'll go into that later on.

What's involved in a digital transformation?

Read this Checklist for Change to find out what's involved and how we'll work with you to simplify the process.
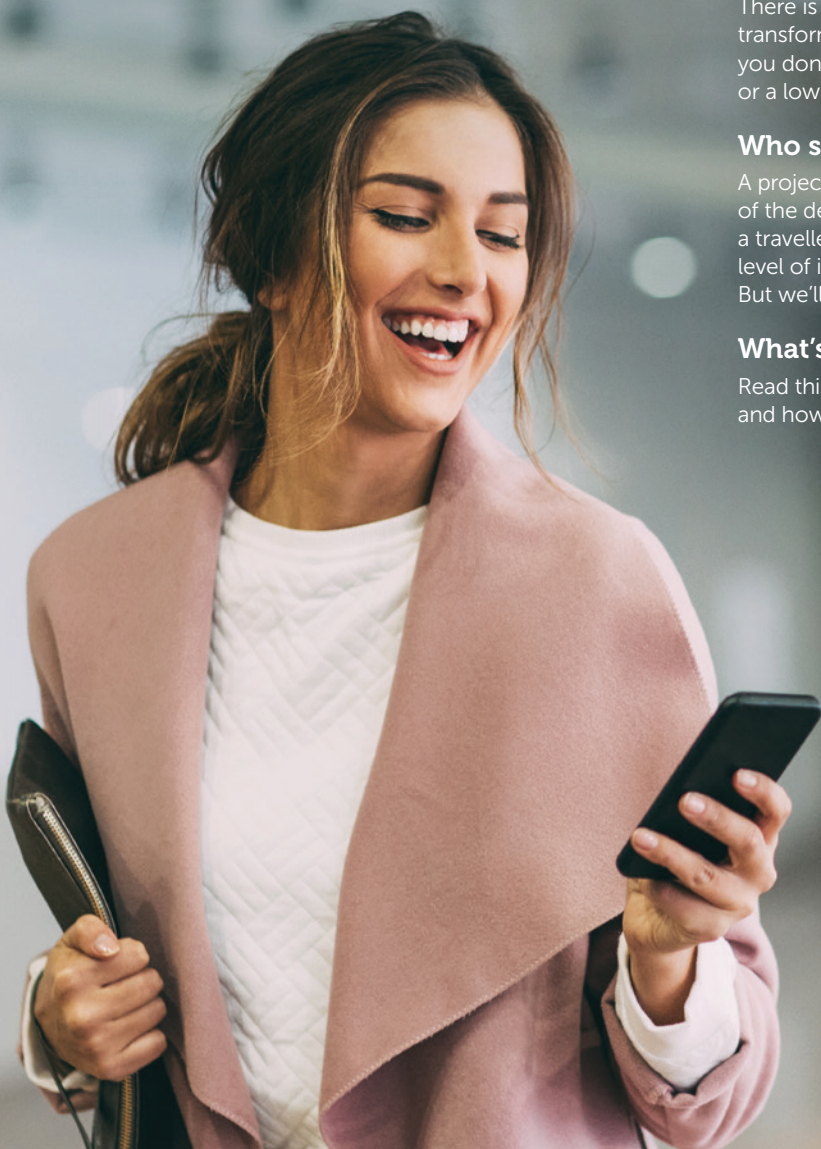
Digital Transformation Starts with Your People

Any process for significant change in an organisation should start with people. Getting the right people involved from the beginning ensures that the business' current processes, challenges and goals are clearly defined.

Start by identifying and engaging with those whose roles will be most impacted by changes to the travel booking system, including the decision makers, those who manage the booking process and those who do the travelling.

To help identify relevant staff, consider who is involved, and therefore who would be impacted by a digital transformation, at these stages of the process:

- Requesting travel
- Approving requests
- Booking travel
- Travelling
- Post-travel reporting and reconciling

Initial questions to ask to gain an understanding of the current processes and requirements of your travel booking system include:

- What is involved in the process?
- Who is responsible for each step?
- How long does the process / each step take?
- What costs are incurred?

Moving forward, focus the group down to key contacts who will help shape and drive the digital transformation. The project manager is going to need the expertise and support of others to ensure the right systems are put in place and adopted by the wider organisation.

You will also need to collate details on your travellers, such as preferences and travel requirements, however you can come back to this later on, once the transition process is underway.

Review Your Current Procedures

Once you have a sound understanding of your current travel booking system processes from different users' points of view, review them to consider where changes can be made and where the biggest benefits will be felt.

Some questions to consider at this stage include:

Are manual processes required or can they be taken online?

How lengthy is the approval process and can it be streamlined?

How long does the booking process take and can it be simplified?

Is there any room in the booking process for personalisation?

How are travellers supported when they're on the road?

What is required for post-travel reporting and is this a complex process?

Also review the points under 'Define Your Needs' on page 5 for more considerations.

It's also a good idea at this stage to review your current travel policy if you have one, to make sure you've considered all your organisation's rules for travel. Don't worry if you don't yet have one, as we'll work with you on this.

Finally, collate information about your organisation's travel budget and tracked expenses. Ideally, you should have this information at hand anyway, but pulling it together will help to give you an idea of where the biggest expenses are, and ultimately, where the biggest savings might be made.

Define Your Needs

Now that you have an understanding of the current state of your travel booking processes, take a moment to define your needs when it comes to a new system. What does your business as a whole, and your bookers and travellers in particular, want to gain out of implementing a new online travel booking system?

We can help you increase control by delivering total visibility of your travel program. We'll give you the big picture view of where your dollars are going and set parameters that achieve your business goals.

You might be thinking that the digital transformation process to this point has been very manual, with little digital involvement. But you have set the foundations for the rest of the process – and this is where we come in.

Here are some ideas to get you started:

Reduce the time it takes to request, approve and book travel.

Identify where you're saving money and further opportunities for cost-saving.

Improve efficiencies by introducing a single sign-on dashboard.

Easily reconcile credit card expenses and statement.

Easily locate your travellers 24/7 in case of emergency or international incident.

Provide your travellers with apps to make connecting on the road easy.

Generate reports at the click of a button.

Maintain control of your bookings.

Forecast travel spend for budgeting.

Receive ongoing and on-call support from a real person who knows your business.

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Work with your Dedicated Travel Manager

Implementing new travel technology into your organisation is not a process that you need to go through alone. We'll provide a dedicated Travel Manager to work with you through our process to ensure a smooth transition that achieves your goals. It's as easy as 1,2,3.

1. We get to know your needs

It all starts with discussing your needs. Your dedicated Travel Manager will set up an implementation meeting to discuss:

Your travel policy, which we'll review if you have a current policy or work with you to develop one if you don't, to set your rules for air, ground and accommodation:

- Your business administration set up, including policies and procedures, such as internal departments, cost centres, PO numbers.
- Booking policies that stipulate who is allowed to book, who can make changes, and authorisation requirements before ticketing.
- Payment options.
- Invoices, statements and EOM procedures.
- Reporting, to identify what reports you need and when you want them.
- Traveller profile spreadsheets to confirm any preferences and requirements.

2. We form a plan and timeline

With an understanding of this detail, we'll form a comprehensive plan for your online booking platform and provide a timeline of the key milestones for the launch of your new travel tool.

We'll then work to implement the technology based on your requirements and launch it for your organisation. For total peace of mind, we always include testing time as part of this process.

3. We review

it can take time to become familiar with the nuances of new technology, so once you've had a few months to get to know it better, your dedicated Travel Manager will schedule a 3-month review to discuss your needs, feedback, any questions in more detail and any tweaks or changes you'd like to make.
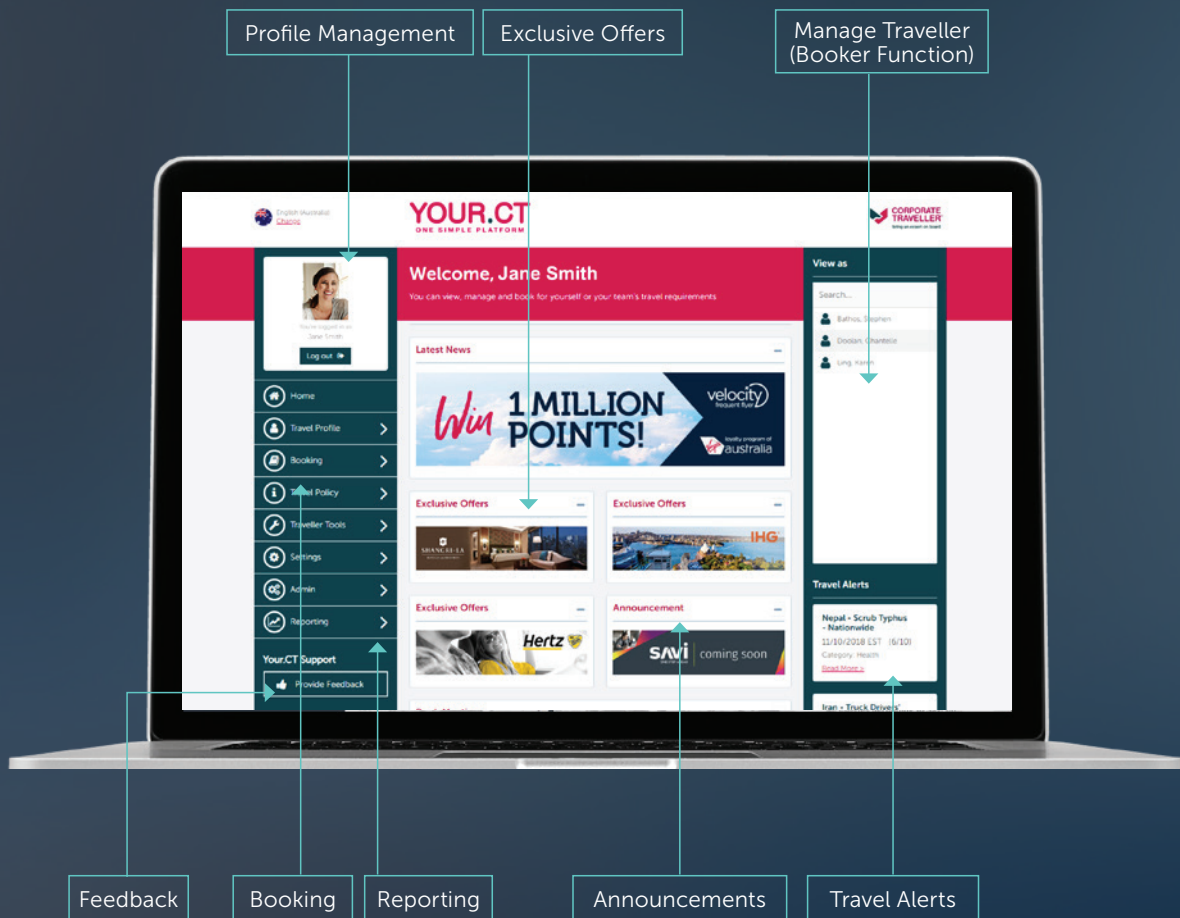
The 3-month review provides a formal opportunity to:

- Ask any questions you may have.
- Address any issues that have arisen or functions that are not working.
- Discuss any key recommendations we may have.
- Discuss your future objectives.

Consider the right tech for your needs

As you work through the early steps of this digital transformation process, it can be beneficial to have an understanding of the technology available and how it might be integrated into your organisation. YOUR CT is a single sign-on platform that brings all your travel tools together into one easy to manage place. Book trips, run reports, access all your travel info and invoicing data from a simple, easy-to-use dashboard.

Your suite of travel tech tools may include:

Profile Management

Exclusive Offers

Manage Traveller (Booker Function)

Feedback

Booking

Reporting

Announcements

Travel Alerts

SAM
AI-Powered Pocket Travel Assistant

Sam (Smart Assistant for Mobile) is an AI-powered pocket travel assistant that helps business travellers with everything from itinerary management, bookings, service and support.

CT Mobile App
Itinerary Management for Travellers

The best way for travellers to manage their itinerary in one place instead of searching through multiple documents, plus booking capability that lets you make changes on the go with travel policy integration.

Rapid Reconcile
Expense Management Tool

Plug in your business expense tool to your finance management team, reducing double handling and letting your employees focus on what they do best.

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Manage Organisational Change

With Corporate Traveller's support, the easiest part of the digital transformation is the actual implementation of the new technologies. You might find that the most challenging part of the process is managing organisational change.

As is the nature of change, there is the potential for resistance from your staff. With preparation and a framework in place, you can manage the changes from within your organisation with as little friction as possible. Change management involves preparing and supporting your staff through the process of implementing and successfully adopting change.

Communicate

Remember back to the start of the process, when you engaged with those in your organisation whose roles would be most impacted by the digital transformation? This was actually the start of your change management process. Engaging, and being open and transparent with your staff throughout the process will help them to understand and accept the changes as they are happening. Inform them of:

- Why you are introducing an online travel booking system?
- How will the process change, especially from their point of view?
- What are the benefits of the new system to the users?
- What are the time frames for each step?
- What are the impacts of non-compliance will be
- How will they be equipped for change?

Train

Providing relevant training for your staff in the new online travel booking system will not only educate them to navigate their way around the new technologies, but it will also give them confidence and empower them to own their part in the process.

Running personal, hands-on training sessions will enable your staff to gain a greater understanding of the functionality available and how it will benefit them while on the road.

Measure

the best way to measure the effectiveness of your new online travel booking system is to go straight to the user. You can gauge participation in training sessions, staff interaction with the platform and apps, and introduce regular pulse surveys to gain feedback.

Be sure to use the data you collect to enhance the experience for your staff. For example, if you receive feedback on the digital platform, speak with your dedicated Travel Manager about possible solutions. Implementing changes based on feedback is a great way to show your staff that their opinion is valued.

You're ready to HIT START on your digital transformation, join Corporate Traveller's world of online booking tools and prepare your business for digital transformation. Use this guide and the following Checklist for Change to simplify the process.

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Your Checklist for Change

Implement Corporate Traveller's online booking tools with a smooth digital transformation process by following the Checklist for Change.

Start:
☐ Arrange a meeting with a dedicated Travel Manager from Corporate Traveller

Start with your people:
☐ Identify staff whose roles will be most impacted by changes to the travel booking system

☐ Engage with staff to understand the current process, their challenges and suggestions

☐ Identify key contacts to help drive digital transformation

Review current procedures:
☐ What are the manual processes?

☐ Can they be moved to an online format?

☐ Is the request process already electronic?

☐ What is the approval process like?

☐ How long does it take?

☐ Can it be streamlined?

☐ How long does the booking process take?

☐ Is there opportunity for personalisation in the booking process?

☐ How are travellers supported when they're on the road?

☐ What is required for post-travel reporting and is this a complex process?

☐ Review your current travel policy to consider all your organisation's rules for travel

☐ Collate information about your organisation's travel budget and tracked expenses

Define your needs:

Do you want to:

☐ Reduce the time it takes to request, approve and book travel

☐ Improve efficiencies by introducing a single sign-on dashboard

☐ Easily locate your travellers 24/7 in case of emergency or international incident

☐ Generate reports at the click of a button

☐ Forecast travel spend for budgeting

☐ Identify where you're saving money and further opportunities for cost-saving

☐ Easily reconcile credit card expenses and statements

☐ Provide your travellers with apps to make connecting on the road easy

☐ Maintain control of your bookings

☐ Receive ongoing and on-call support from a real person who knows your business

Your Checklist for Change

Implement Corporate Traveller's online booking tools with a smooth digital transformation process by following the Checklist for Change.

Compile the following information for your meeting with your dedicated Travel Manager:

Your business administration set up, including:

☐ Policies and procedures

☐ Internal departments

☐ Cost centres

☐ PO number

Booking policies that detail:

☐ Who is allowed to book

☐ Who can make changes

☐ Authorisation requirements before ticketing

☐ Payment options

☐ Invoices, statements and end-of-month procedures

☐ What reports you need and when you want them

☐ Traveller profiles, including preferences and requirements

Leave the planning to your dedicated Travel Manager:

☐ Receive comprehensive plan for your online booking platform from your dedicated Travel Manager

☐ Receive timeline of the key milestones for the launch of your new travel tool

☐ Stay updated on the implementation and launch of the technology

☐ Let Corporate Traveller take care of the rest!

Manage change management:

Communicate

☐ Engage staff at the start of the process

☐ Provide regular updates to key contacts and all staff who will be impacted

☐ Ensure two-way communication by providing opportunities for input and feedback

Train

☐ Talk to your dedicated Travel Manager about training in the new platform

☐ Schedule training sessions and invite your staff to participate

☐ Provide ongoing opportunities for refresher training and guidance through new tools

Measure

☐ Gauge participation in training sessions

☐ Gauge staff interaction with online booking tool platform and apps

☐ Introduce regular pulse surveys to gain feedback

Prepare for 3-monthly review:

☐ Compile feedback and any questions put forward by users

☐ Record issues that have arisen or functions that aren't working

☐ Consider your future objectives for your online travel booking processes

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To find out more, visit corporatetraveller.com.au

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