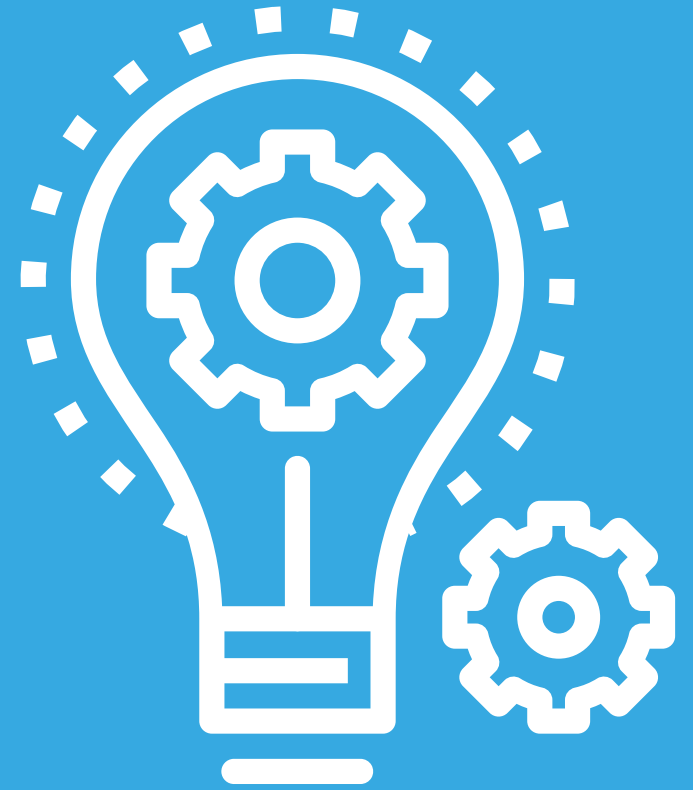
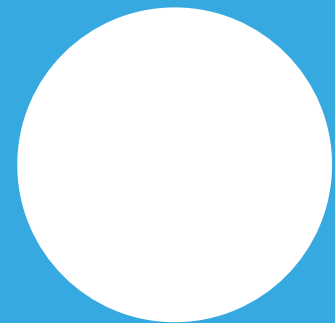


BEST PRACTICE FOR
implementing
a travel
management
service



A handy guide from  ClickTravel





BEST PRACTICE FOR **implementing** a travel management service



A HANDY GUIDE

Introduction

Know your objectives

The right timelines

Know what's expected of you

The right data

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Introduction

You want to implement a Travel Management Company (TMC) and more importantly, you want to get it right.

Once that initial decision has been made, you may be finding the thought of getting from A to B quite daunting and you're likely to be asking yourself a number of initial questions.

How long will it take?

What will make the roll-out successful?

How can you gain buy-in?



BEST PRACTICE FOR implementing a travel management service

Introduction

This guide will help you understand some of the best practices within the industry for implementation success and secondly, provide some direction to help make sure your objectives are truly understood during the process.

So where do you start and where should you be focusing your energy? Firstly, allocate time for some initial planning - reading this guide is already a perfect first step. Then, plan to address each of the key areas below to make sure you're as prepared as possible for your first implementation meeting.





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Know your objectives

Firstly, with any project you undertake you need to be aware of what you're trying to achieve and to some degree what the end goal looks like. Without this you could end up making incorrect decisions or creating unnecessary rework for yourself.

Instead, take the time before your implementation starts to really understand your business and 'as is' processes. Implementing a new TMC is an ideal opportunity to consider making some small changes, some of which could potentially make a huge difference. Think about the key objectives you need to achieve as part of the implementation and begin talks with your new TMC about realistic timeframes to achieve each of these. You may already be considering areas such as:

- Reducing your average room rates to £x
- Increasing service adoption, online adoption (or potentially both) to x%?
- Providing a greater focus on duty of care for your employees and considering options such as traveller tracking



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Know your objectives

Of course, your TMC is likely to have already identified some of the factors behind your decision to change and can add depth to your discussions, but don't underestimate the importance of truly knowing your own objectives too.



TIP - Be realistic. Focus on your top 3 objectives to start with; any more than that and you may find you're not getting the initial results you hoped for. Once you've achieved them, you'll have the confidence to move on to the next level.



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The right timelines

Secondly, you'll need to consider timelines. Sometimes one size really does not fit all. Start by having meaningful discussions with your TMC around your requirements and work together to agree the best plan. Thinking through the questions below will help you determine the right implementation timelines for you and for your organisation.

Q: How ready is your company for this change? Are there other internal projects going on that you need to consider?

Q: Are you reviewing your travel policy as part of the implementation? If so, consider who needs to approve it and how long gaining approval is likely to take.

Q: Do you need to implement everything in one go, or could things like travel policy and approval processes be layered on after the initial launch?



HINT - This can often be a better way of rolling out a new service, rather than hitting everyone with huge change in one go



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The right timelines

- Q.** What resource do you have available to support the project?
- Q.** How quickly can your new TMC implement and can they offer any flexibility with timeframes?
- Q.** Does your existing contract have a fixed end date? Could this be extended if needed?



Once you've agreed realistic and achievable timelines, make it your goal to stick to them. Your TMC should be providing you with, and owning, a step-by-step implementation plan to help ensure your project stays on track.



NOTE - If a TMC is reliant on a 3rd party you may find they are limited as to what they can commit to



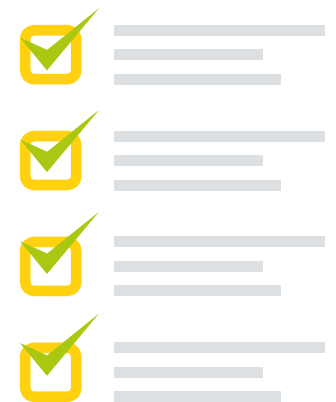
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Know what's expected of you

It's important to take the time to really understand the level of input you need to provide during the project. Experience shows that the most successful implementations are the ones where clients have been the most engaged, but what does this actually mean? In short, you need to be prepared and you need to have some resource set aside each week to support the project. This could be yourself or you may decide to allocate the project to someone else within your business who can provide greater support with the finer details of the implementation.

The considerations below will help you plan this area in the most effective way:

- Ask your TMC to share their project plan with you as early as possible. Ideally, you'll have already seen this as part of your tender process (if you used one), so there should be no surprises.
- Use the experience of your TMC and ask them to share an example of their recommended resource plan. This way you'll have a much better idea of the time you're committing to upfront.
- Consider forthcoming periods of annual leave. For example, it is not advisable to delegate the project to someone who is due to be on leave for any significant period of time in the run up to launch.
- Understand how the project will be managed from the outset. Weekly conference calls, project plans and action logs can all help, but check that your TMC will own these processes. You want to be confident that they'll alert you early enough if the project status is at any risk of changing.





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Know what's expected of you

Perhaps most importantly you need to be committed to delivering what you say you will, within the timeframes you agree to. If at times this isn't possible, let your TMC know early enough so that the impact can be assessed.



TIP - If you have any concerns around resource, always talk to your TMC about the most critical items required and focus on these first. Maybe there's an opportunity to pick up on the less important tasks or 'nice to haves' post launch. This way you'll still start to see some early benefits without losing too much momentum.



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The right data

This may seem quite obvious but it's surprising just how many organisations are unable to get their hands on this type of information quickly. To help implement your business successfully, a TMC really needs to know as much about your company and travel patterns as possible. This can range from your last 12 months' management information (MI) data, to a list of your negotiated hotel contracts. Without any existing data, your TMC will need to ask you lots of questions during the implementation, most of which could easily have been avoided.

Make a start on gathering the key pieces of information you know will be required as early as possible, items such as Travel Policy, Cost Coding Requirements and Supplier Contracts are generally standard requirements.



NOTE - Your TMC should have an Implementation Checklist they can share, which you can start to work on in preparation for that first meeting. Use this as a starting point and share as much information as you possibly can.



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Communication, and lots of it!

There's no denying that travel is an emotive subject. Everyone has a vested interest and a personal opinion; at times you are likely to find yourself in the centre of this. Communication will be key to your success, and you can significantly support your implementation by building in some of these best practice communication ideas:

- Involve key stakeholders from the start. Invite Senior Travel Bookers or PAs to be part of the procurement process. Quite often the more vocal they are, the better.
- Talk internally and engage all areas of the business. Make a note to also include any Subsidiary Companies, Finance Departments or non HQ offices, as these can often be overlooked.
- Plan a visit to your TMC's office to meet their wider teams. Consider taking along some key stakeholders too.
- Ensure initial company-wide communications are endorsed by Senior Management to help gain buy-in.





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Communication, and lots of it!

- Work closely with your internal communications team to ensure they are kept well in the loop, can support the project as required and are there to ensure your internal guidelines are followed.
- Provide an FAQ and a point of reference to support the change process.
- Develop subject matter experts for the new process to help drive service adoption.
- Keep key suppliers updated with the changes taking place and introduce them to your new TMC contacts.
- Keep communication channels with your incumbent agent open regarding the de-implementation process and the support you will require beyond the transition date.



NOTE - Save yourself time and try not to reinvent the wheel. Agree a communications plan with your TMC and ask for example documents and recommended timeframes from them that you can use and adapt to suit your business.



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The right training

Whilst there is no denying training is important, you want to take the emphasis away from the volume of training and instead make sure it is focused on the right training for the right people. If you've selected a TMC that is simple and easy to use, there really shouldn't be the need for lots of over-complicated training sessions. Instead, consider the culture in your organisation and the training your end users will expect or will ultimately need.

For example, if this is the first time you're rolling out an online booking tool, more hand holding may be required. On the flip side, if you're based at a tech savvy company you may find structured training sessions go down like a lead balloon.



TIP - Remember, if you're implementing an online tool as part of your new TMC rollout to consider the benefits of a two week Pilot phase for a group of key users. This will help significantly towards building user confidence and gaining buy-in across the business ahead of your full rollout.



BEST PRACTICE FOR implementing a travel management service

The right training

Your TMC should be able to offer a range of training options for you to select from. Use their knowledge and experience to understand what works well for similar companies. The types of options available should include:

- Clear and concise user guides
- Informative Online help pages
- Online chat facility
- 24/7 emergency support



TIP - Think about how your TMC can also support you with ongoing training as this will be critical to continued success in the future.

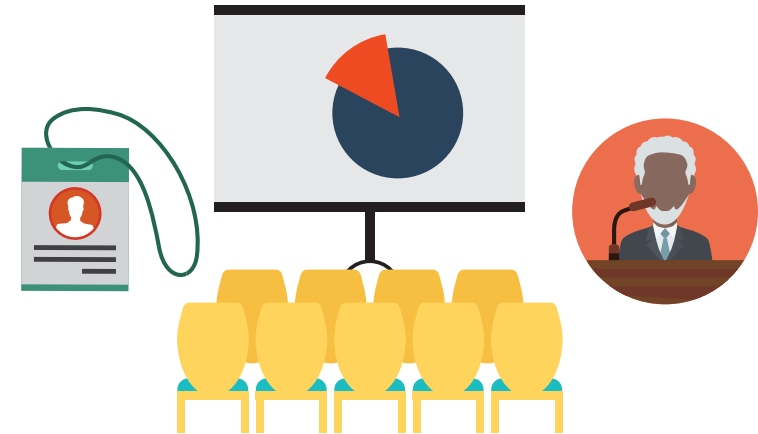


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The right training

- Live WebEx session
- Recorded video sessions that can be used 24/7
- Face to face training sessions at your company offices
- Customised video and guide options
- Traveller or booker roadshow days
- Feedback and frequently asked question sessions

Whilst some of these options may come as an optional extra, if you're confident it's the right training for the right people, be open to the fact that the benefits are likely to far outweigh any additional cost.





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Allow room for improvement

Finally, it's important to remind yourself that you really don't need to implement everything from day one to make your project a success. Whilst it's natural to want to include as much as possible for the launch of your new TMC, you need to weigh up all of the points covered here in this guide. Prioritise what is most important to you and keep revisiting those initial objectives you set yourself to make sure you don't lose sight of where you want to be.

A great TMC will grow with you over time and even when the implementation phase is complete, they will constantly be looking at ways of continuous improvement to support you and your goals. This could be simple things such as recommending small tweaks to your travel policy, or implementing additional product types. It could also include benchmarking your company against other similar clients to identify opportunities for improvement.



REMEMBER - Travel is not static and as such you'll need your TMC to have a degree of flexibility so that they can drive and support you on a continuous improvement cycle.



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Conclusion & additional resources

By understanding these industry best practises, you're certain to be in a better position to plan your forthcoming implementation. And remember to bear in mind that your TMC should be working with you to make the implementation process as smooth as possible, so if they're not pulling their weight, let them know and be proactive in getting the process back on track; if they're worth their salt they'll respond in a prompt and positive manner.

Helping clients achieve a successful rollout is key to Click's success; read more about how we guide our clients to travel management success in our [Case Studies](#).

For further hints, tips and advice on how to achieve a successful implementation, read some our handy blog posts:

- › [7 things you need to do when implementing a new business travel agent](#)
- › [5 fatal mistakes to avoid when implementing a new business travel management company](#)
- › [10 tips to successfully implement a business travel management service](#)

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