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How to Motivate Corporate Business Travellers to Stay in Policy

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The essential travel policy compliance checklist

The primary purpose of this checklist is to help you convince non-compliant employees to work within your organisation's travel policy by turning it into a relevant, readable, useful tool for today's traveller.

Why is compliance so low?

If the travel policy is a crucial business tool, then why do so many companies find it hard to control travel policy compliance? With more business travellers going rogue, and booking their own trips, we provide some essential tips and ideas that may help you gain more compliance.

Communicating why your travel policy exists

The first hurdle of implementing an effective corporate travel policy is to make sure employees know that it exists - and to get them to read it. The policy should, crucially, create a framework to ensure how to keep their travel spending within budget, while providing a thorough understanding how the company will meet their duty of care obligations and keep them safe while travelling.

What's trending in corporate travel policy?

The emerging trends in the corporate travel industry are fuelled by technology, digital disruption, the pressure to drive down costs, improving efficiency and recognising the changing needs of Gen X and Millennial employees. Here we provide tips on how to balance the requirements of your business travel objectives with the needs of a new generation of employees.

**“Up to 70 percent
of non-compliant
employees aren’t
even aware that a
mandatory policy
exists.”**

**CWT Travel Management
Institute survey report**



IF NON-COMPLIANCE TICKS YOUR BOXES THEN CHECK OUT THIS ESSENTIAL TRAVEL POLICY CHECKLIST

Use the following checklist to help you get more employees to stay in policy.

1. Have you created a business travel policy yet?

This may seem oddly obvious, but without a robust corporate travel policy firmly in place it will be hard to track and reduce your company's travel spend; or keep your employees safe while working for you in different parts of the world. To help you do just this, we have created our own Visual Travel Policy Builder. Based on a visual, infographic approach it's designed to bring clarity, simplicity and organisation to your travel booking, spending, and reimbursement processes. Download and share the travel builder with your colleagues at: <https://booki.ng/2hKua9M>

2. Are your employees aware that you have a travel policy?

The first step to getting employees on board with your company's travel policy is to make sure they are aware your company has a travel policy. This should be clearly communicated to everyone in the company so it can be adhered to and enforced. A good tip here is to use multiple communication channels to promote the existence of your policy. Each employee has a different preference for traditional or non-traditional channels, so it's best to cover your bases with a wide range of options:

- Face-to-face
- Printed materials
- Webinars
- Intranet
- Video
- Emails
- Newsletters
- Social media
- Texts/Mobile

3. How compliant are your employees with your travel policy?

“Lack of awareness of the rules for controlling expenses is one of the main reasons why travellers book outside their company's policy to find lower prices,” says the CWT Travel Management Institute in a recent survey report. “This underlines lack of understanding of the travel programme, as well as the intricacies of effective travel management and the value of compliance.”

“Only 55 percent of surveyed travellers said they had a good or very good knowledge of their company’s policy.”

CWT Travel Management Institute survey report



4. What are your top compliance challenges?

There seems to be no end to policy compliance challenges. According to more than 500 travel management professionals surveyed by The BTN Group, 30 percent of respondents identified booking through the designated channel as the top concern. This was followed by adhering to advance booking policies (16 percent), booking preferred hotels (10 percent), adhering to per diems/cost restrictions (7 percent), booking negotiated hotel rates (4 percent) and booking preferred air suppliers (3 percent). Another 30 percent said they had other, unidentified challenges.

It's crucial, therefore, that you make employees feel that they understand the advantages of staying in policy. A good tip here is to share stories of how employees are actively seeking options that stay within budget. Make travel an ongoing conversation with your employees by sharing stories through your company blog, email, and newsletters. A good tip here is to share stories of how your business travellers are actively staying within budget. This promotes smart travel behaviour, gives you valuable insights into what is working and what is not, and helps you modify your policy to improve compliance.

5. Is your travel engaging business travellers in their own language?

The Baby Boomers are leaving the workforce and are being replaced by younger Gen X and Millennials employees. Because of this, consider writing your travel policy in a less corporate tone and voice. Using words like Whoops, YIKES, Uh-Oh! for policy violations should not be beyond consideration. Try to find the right balance between what you need to communicate and the person who should read it. If it sounds like it's only written by and for procurement and finance, then it will only be understood by procurement and finance.

6. Can your employees contribute to your policy?

One of the keys to making compliance more sticky is to make your travel policy part of an ongoing conversation. It should be a living, breathing, growing story that you communicate often. Rather than focusing on getting employees to conform, think about having them contribute as well. The key here is to ask for feedback from your business travellers about what works and where there are flaws. Then continuously modify the policy. The result will be a policy that meets their needs. Resulting in higher company compliance.

“Rather than asking employees to conform, think about having them contribute as well.”



7. Have you defined your priorities?

It will come as no surprise that different departments in your organisation have different priorities surrounding business travel. Chief executives might want growth at all costs, while others desire to restrain costs or increase the efficiency of an organisation. Travellers themselves, of course, just want to have a productive trip.

A new report, “Managing Every Mile,” from Amadeus and the London School of Economics, shines a light on this phenomenon (<http://bit.ly/2C6wVf2>). Based on interviews with C-level executives from major international corporations, the study reveals that organisations need to implement a comprehensive framework for travel and expense spend management if they are to achieve maximum return on investment (ROI defined not only in financial terms, but also in terms of greater employee satisfaction, productivity and duty of care).

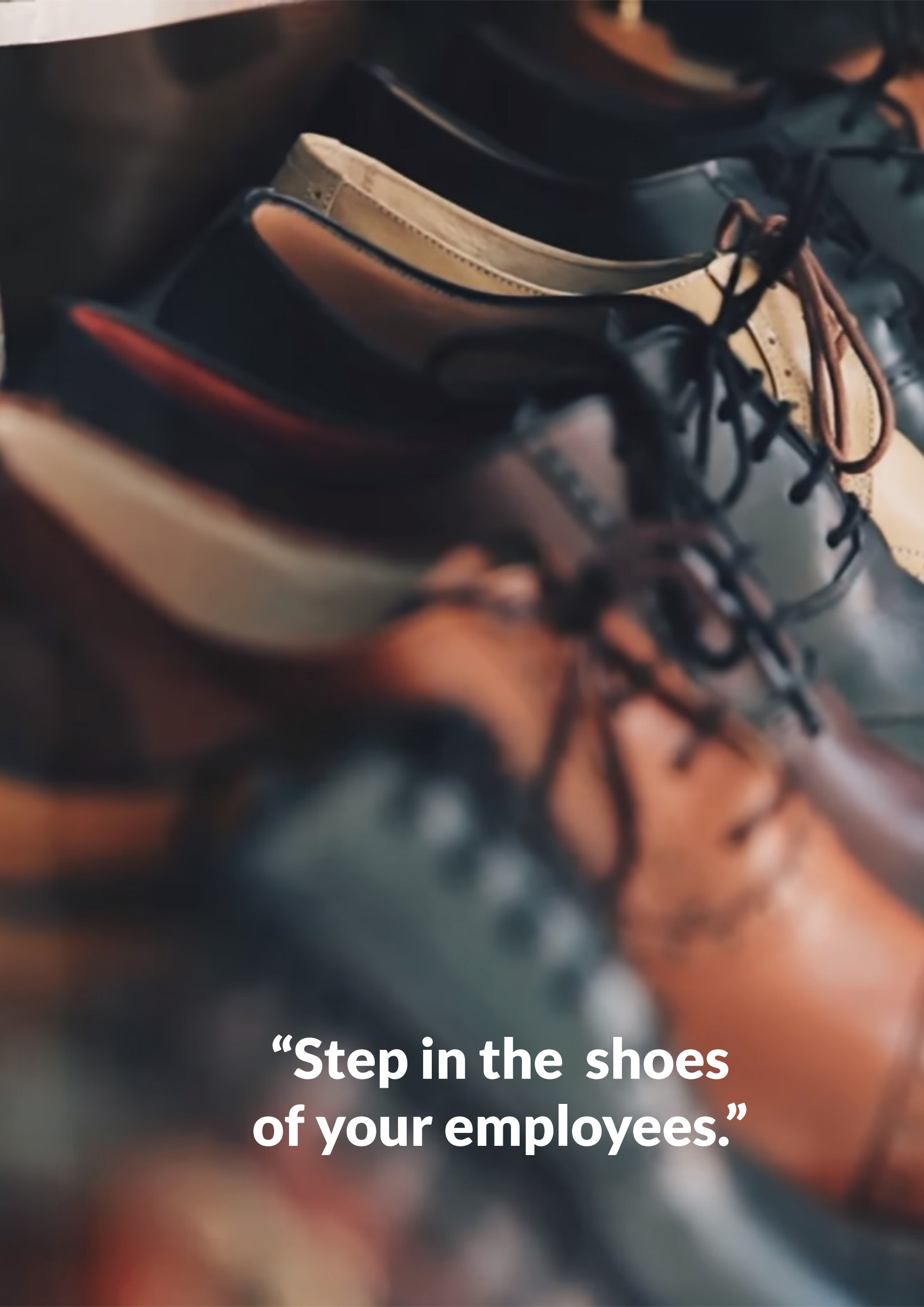
8. Is your travel policy readable?

Is it useful, usable, understandable and clear? Writing a travel policy that people will read and use is a balancing act. While the details matter—covering every stage of the trip from booking through to reimbursement— clarity and brevity are the heart and soul of an effective travel policy.

So how do you get people to engage with your travel policy? The answer can be found by reading ‘The Ridiculously Uncomplicated Guide To Creating A Travel Policy People Will Actually Read (And Follow)’. This helpful eBook explains how to boost compliance for the busy traveller through visualisation techniques. Download your free copy here: <https://booki.ng/2C8C6xn>

9. Pretend to be a business traveller and read it out loud

Once you’ve written your corporate travel policy, the first step is to read it as though you were a business traveller. Step out of your shoes and imagine the steps that your employees need to take to arrange a trip and be reimbursed for expenses. If there are too many hurdles, then you should focus on cleaning up or simplifying the policy. If it only focuses on saving the company money, with no real benefit to the reader, then it will not get read.



**“Step in the shoes
of your employees.”**

10. Does your travel policy reflect the real needs of the traveller?

Research shows that only 38 percent of business travellers are satisfied with their company travel policy. That means a lot of people are dissatisfied with their business travel experience. Which in turn could reflect badly on their ability to perform at their best. So how do you make sure employees stay on policy and not become rogue travellers? In short, factor in the needs of the employees. At the same time, make sure the travel policy is easy to follow and gives concrete reasons why it's in everybody's interest to control costs.

11. Can your recent travel data be used to make changes or improvements to your current policy?

With flights and accommodation costs fluctuating widely from city to city, do you see examples of potential cost-saving opportunities resulting from a small change in the itinerary? Do certain city districts have better hotels at cheaper rates? Are there ways to avoid the costs of last-minute bookings by encouraging advanced purchases? And so on.

12. Is your travel policy flexible in its range of options?

Travellers feel their needs are being taken into consideration when they are offered a wider range of options for hotels and flights. Costs can always be kept to a reasonable level by setting a benchmark for hotel star ratings and class of airline tickets.

13. Are you crystal clear about what's expected from the traveller?

A travel policy is a juggling act between the needs of employees, with the needs of the company. It's not always easy to get this balance right. While we can't recommend the exact approach that each company should take, the ideal travel policy should cover every eventuality. Leaving no stone unturned or any area for doubt. If this is not possible, the policy should at least cover expense categories, non-refundables, expense reporting, reimbursement process and safety information.

**“Only 38
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**GOOD
VIBES
ONLY**

14. Do you thank your business travellers for their compliance?

Make sure you thank your business travellers for their thoughtful compliance and ethical use of company or foundation resources. Many cutting-edge companies are using gamification to give business travellers tangible rewards for complying with company travel policies. For example, one popular reward incentive is to give cash back to employees who save their company money by beating the budgets they set. We recommend half. Do this, and you will find employees are eager to make cost-effective choices. Be aware that this kind of incentive can be taxable.

Another example is to reward travellers who stay at less expensive hotels with a room upgrade. Rewards can also include gift cards from airlines, hotels, or car services for employees' leisure travel. Emotional incentives are also popular and easy to set up. Start an office competition, for example, for who saves the most. Then display or email the names of the big savers. This has the potential to go a long way.

15. Does your travel policy have the right balance between travel expenses and business support?

Business travel is essential for growing your business. It provides important face-to-face time, which is so vital in pursuing new business opportunities, building critical relationships and securing new deals. It's essential, therefore, that your travel policy supports employees in performing at their best while travelling on business.

Try to provide the right balance between providing thoughtful corporate traveller support and controlling expenses incurred in support of company-related business.

16. Do you train your staff on how to use your travel policy?

Many business people are seasoned travellers but this should not stop you from training them on your travel protocol—especially if it's their first trip with your company. There are many ways to do this— in person, in a group or online. Apart from a read-through, the training should also touch on various examples of how to react to possible events—especially where safety is concerned. Many businesses fail to implement this essential step.

Training should also be documented and signed off. This provides, in case of a liability, your commitment to employee education and safety. To save time, we highly recommend making a video to cover these points. Make sure that your employees know that it exists and where to find, view and download it online.

17. Does your travel policy cover how you and your employees should react in case of an emergency?

All travel these days comes with varying degrees of risk. Duty of care should be provided for all travellers whether they are doing business in low-risk, mid-risk or high-risk countries. It should be clear in your travel policy how each party should react to an incident, emergency or event.

18. Can you easily contact your employees in case of an emergency?

The travel policy should at the very least include travel contact information: including work and personal mobile numbers, local cell numbers if used, hotel or accommodation details and a number that can be reached at home. If your employees work in high-risk countries, then it's advisable to set up daily or weekly situation reports.

19. Do you rely on one or a mix of formats for your travel policy?

Different people learn in different ways – providing information in multiple formats helps to ensure the information is absorbed. They say there are seven different ways that people learn. These include visual, aural, verbal, physical, logical, social and solitary formats. It might be worth asking if your audience prefers using words, images, sound or visuals - or a mixture of some or all of these formats. And whether they prefer to do this in a group or alone. It may open some new ways to get more employee compliance with your travel policy.

20. Are you aware of the trends affecting the corporate travel industry?

With the speed of change in technology, and a fluctuating global economy, the corporate travel industry is evolving at quite a rapid pace. This is having a major impact on travel policies for businesses, big and small. Many companies are now providing their duty of care with risk management tools that help track and communicate with employees to alleviate potential risks during unforeseen events.

There is another trend called Bleisure, which mixes business with pleasure. Many employees want to get work done while enjoying down time to explore various cultures, revitalise their energy and reduce stress. And some companies are getting very smart with ways to reduce costs—budget airlines, lower star hotels and video conferencing instead of travel.

We hope this essential compliance checklist has helped open your eyes to the changes, trends and opportunities within this “new age” of corporate travel.

**“Train employees
on how to react
to safety-related
events.”**



A Snapshot of Policy Compliance Issues

We end with a useful snapshot of the trends, problems and opportunities surrounding travel policy compliance:

What are the main pain points for travel managers, HR and procurement?

- Travel policy compliance is very low.
- Many employees are not aware that a mandatory policy exists.
- Employees are doing their own thing and booking outside company policy.
- Many think they're a travel expert and challenge the costs of what I book.

Why do so few travellers sit down and read your travel policy?

- The travel policy is too long and complex.
- For younger readers, there is a generation gap in the language used.
- There is no snapshot or summary of the main points.

What trends are affecting corporate travel policy?

- Technology and digital disruption are changing the game.
- Higher travel costs are expected, making finding efficiencies even more important.
- The rise of Bleisure (mixing business with pleasure).
- Big data on traveller preferences and behaviour is helping shape decisions on travel costs and safety.

What opportunities are there to improve your company's travel policy compliance?

- Factor in (new generation) employee satisfaction. To help you to deliver a positive, relevant experience read 'How To Stay On The Right Side Of Your Business Travellers'. This free eBook is free to download here: <https://booki.ng/2DfnRnu>.
- Speak to your employees in their language.
- Ask for feedback and suggestions.
- Be more creative in your approach to compliance.
- Educate employees on duty of care.
- Make sure policies are accessible, transparent and up to date.
- Take advantage of new technologies.



**“Open your mind to different
formats.”**

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