SAME SOLUTIONS
security awareness made easy

5 STEPS TO TRAVEL RISK AWARENESS WITH IMPACT

GUIDE

TRAVEL RISK AWARENESS PROGRAMS AIM TO KEEP EMPLOYEES SAFE

Well-informed, prepared and aware travelers are safe travelers. If they also know and follow your internal processes, that's even better. Travel risk awareness programs aim to achieve these two things: safety and compliance.

However, many travel risk awareness programs fall short in achieving their aim.

The team behind SAME Solutions has built many programs from the ground up and helped a wide range of organizations to improve and rethink their approach to travel risk awareness.

From our own experience, talking to peers and clients, we've found that unfortunately many programs are characterized by:

- A one size fits all, tick-the-box approach
- Limited uptake on travel risk portals and communications
- User experience that falls behind expectations
- Complicated processes that are hard to follow
- Information that's hard to find
- Boring content

Sound familiar?

5 STEPS TO CREATE A MORE IMPACTFUL AWARENESS PROGRAM

With this guide we want to help you start down the path of fixing these issues. We highlight guiding questions that will help you workshop your current program with stakeholders and identify opportunities for improvement. We'll share actions you can implement yourself, even by spending little or no money.

Taking these actions will help you bring your program to the next level and achieve your aims. They will also help you communicate your successes effectively, which is great marketing for your function.

To build a best-in-class travel risk awareness program, there are 5 key areas to address:

1 **Be clear on the program you want to build**
- Define your vision and how far you want to take it
- Create alignment across the team

2 **Know who your customers are**
- Segment your customers
- Work out what makes them tick and what their needs are

3 **Decide on the minimum content you will share**
- Identify the bare minimum that different segments need to know
- Edit down to what is essential
- Make content simpler

4 **Optimize how you share your content**
- Spread content out across a learner journey
- Deliver relevant content in time

5 **Tell the story of your success**
- Define what success will look like
- Identify the data you'll need to show your impact
- Gather the data
- Present the data and share your success story

BE CLEAR ON THE PROGRAM THAT YOU WANT TO BUILD

To be set up for success, you need to know where you want to go. It's important you have a clear goal and vision for your program. You should also be clear (and realistic) on how far you want to take the program. Do you only want to meet your Duty of Care obligations and ensure you have an audit trail in case of an incident? Do you want your program to have an actual measurable impact or even be an innovator and leader in the field?

Workshop your vision with your team and get everyone on board. If you know where you want to go and everyone is aligned, you will find a way to get there.

REVIEW YOUR PROGRAM

- Which stakeholders do you need to be engaged in your program?

- Are they engaged already, or do you need to reach out?

- Is there a clear aspiration for the program that everyone is behind?

- How far do you want to take the program?

- How are you currently tracking against this aspiration?

QUICK WINS

- **Identify the core team**
  Identify the few core stakeholders that you will need to start making changes. Beyond your Security and Travel team, an expert from Communications and one that deals with travel risk management technology are a great start. Then identify an appropriate Executive Sponsor at the right level.

- **Get alignment on a vision**
  Workshop the vision for the travel risk awareness program. It's a difficult discussion but getting everyone behind an aspirational statement is essential for long term success. Do you just want to create a tick-the-box exercise, do you want to have a bigger impact and make people safer, or do you want to build an industry leading program? Knowing how far you want to take the program is crucial.

LONG TERM IMPROVEMENTS

- **Set up long term engagement**
  Once you know where you want to go, it's time to make a plan and involve more stakeholders. Get a wider group together, including a high-level sponsor. Set up regular meetings to stay accountable to delivering against the plan.
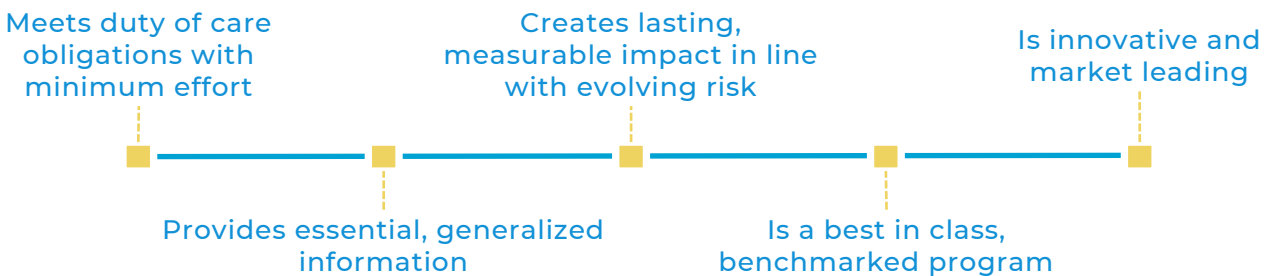
PUT IT INTO ACTION

When creating the vision statement, there are a number of elements to take into account:

- ❑ Corporate culture
- ❑ Legal requirements
- ❑ Duty of Care standards
- ❑ Essential operations of Travel Risk Management function
- ❑ Brand of the Travel Risk Management function
- ❑ Innovation & thought leadership aspirations
- ❑ Effectiveness at achieving aims

Alignment on these issues will make it easier to gather the resources, put in the time and get the budget needed to bring the vision to life.

Example vision statement
Our aspiration is to build a Travel Risk Awareness program that:

Meets duty of care obligations with minimum effort

Creates lasting, measurable impact in line with evolving risk

Is innovative and market leading

Provides essential, generalized information

Is a best in class, benchmarked program

KNOW WHO YOUR CUSTOMERS ARE (REALLY!)

To ensure you are relevant to your internal customers, you must understand who your customers are and what makes them tick. This means moving away from a one size fits all approach.

Having a few basic customer segments will help a lot. A traveler going from a low- to high-risk environment in the Middle East will have very different needs than a regional traveler in sub-Saharan Africa. Also, a millennial traveler will consume information differently than a senior one. The more we know about what our customers want and need, the easier it will be to communicate effectively with them.

REVIEW YOUR PROGRAM

- Do you have a clear understanding of your users' needs?
- What do your users care about?
- Where do your users get their information from?
- How do your users fit into different segments?
- How do users consume your content?
- When do users need your content?

QUICK WINS

- **Map out some basic customer segments**
  A great starting point is to create segments based on risk levels. Groups might include first time travelers, travelers to higher risk areas, travelers from higher risk areas, or complacent frequent travelers. Once you have the groups, think about what their needs and interests are based on previous experiences.

- **Workshop traveler personas**
  Your Communications team are experts, they can help you map out personas for your different segments. These personas help you answer: what do different groups care about? What are their frustrations with the current approach? Where do they get information? Which channels work for them? What messages will connect with them?

LONG TERM IMPROVEMENTS

- **Review assumptions and improve segments**
  Once you have your basic segments in place, further refine them and broaden the groups. You might include bleisure travelers, families and dependents, or specific groups (e.g. Middle Eastern travelers to Europe). Connect with travelers to gain additional feedback and check your initial assumptions.

PUT IT INTO ACTION

Use this example traveler persona to guide the development of your own personas that represent the typical customers your team serves.

Example Traveler Persona

SALLY ANDERSEN

SEGMENT
FREQUENT LOW RISK TRAVELER

DEMOGRAPHICS

AGE 32

LOCATION London, UK

POSITION Regional Director

FAMILY Married

PROFILE

Travels frequently, 2-4 times a month for work. She visits the same region, knows the cities and enjoys staying in the same places. She's never encountered any problems, so assumes the future will be the same. She wants her trips to be hassle-free so she can get on with her work and get home.

GOALS

1. Spend less time organizing travel plans
2. Get the information she needs fast
3. Have a smooth travel experience so she can get on with her work

EXPECTATIONS

- She shouldn't have to find anything herself – if it's important, someone anticipates her needs and will tell her
- She is tech savvy and wants everything to work together, like her personal platforms

FRUSTRATIONS

- Information is disorganized or out of date, and it creates confusion
- Too many emails that often go straight to the bin
- Travel approval processes are too restrictive

DECIDE ON THE MINIMUM CONTENT YOU WILL SHARE

Great content is engaging, easy-to-consume, relevant to the viewer and delivered at the right time. This is how to drive behavior change. Spending the effort and resources to create content is only valuable if your customers actually look at it and learn from it. So figure out what the most important information for each segment is, and then remove all the rest.

Content is great, not when there's nothing further to add, but when you can't take anything else away without losing key messages or context.

REVIEW YOUR PROGRAM

- Is the content tailored to the different segments you've identified?
- Do users find your material exciting and interesting?
- Are your documents, videos and emails short and to the point?
- Is your content in simple and plain language, or is it hard to consume?
- Do you reuse content between different formats?

QUICK WINS

- **Determine the bare minimum level of information**
  Using your segments and personas, identify the key things that travelers in each segment must know.

- **Remove irrelevant information from your documents**
  Be realistic about how much time people can dedicate to your content – it's not a lot! Review all your existing documents to remove what's irrelevant and unnecessary.

- **Make it short, make it visual, make it fun**
  No one will pay attention if your content is boring or overwhelming. So make your documents simpler and use plain language in your text. Start using catchy email subject lines, enticing photography, graphics or video thumbnails for your existing materials to make them more enticing to open.

LONG TERM IMPROVEMENTS

- **Revamp your content**
  Work to change all your documents, videos, emails and more. Create content that is entertaining, compelling, current, and bite-sized for short attention spans. Restructure content into modules that can be grouped together for different segments. Play with different approaches to see what works for your customers.

PUT IT INTO ACTION

Review your current documents and communications to see where you can streamline your message.

Boring content will always be boring, but you can make it easier to digest by:

❑ Making it shorter

❑ Using simpler language

❑ Using the power of stories

❑ Writing catchy titles

❑ Using videos and images to illustrate concepts

CLICK HERE
to see how we bring these principles together in our videos*

Example content changes

HARD TO READ

60 WORDS
POST-GRADUATE READABILTY RATING
15 SECONDS READING TIME

PREPARATION REQUIREMENTS
Preparation, in conjunction with the appropriate level of awareness, is widely considered to be the most effective kind of travel security measure you can take.

The more information you compile prior to travel in reference to potential threats, and general do's and don'ts, the easier it will be to take the right kind of security precautions for your trip.

EASY TO READ

28 WORDS
GRADE 10 READABILTY RATING
6 SECONDS READING TIME

KNOW BEFORE YOU GO
The most effective travel security precautions are preparations and awareness.

Before you leave, do your research on the destination so you can plan ahead.

*Link: https://same-solutions.com/#nav-higher-risk

OPTIMIZE HOW YOU SHARE YOUR CONTENT

In our experience the "build it and they will come" approach to content delivery doesn't work. You need to make sure you're getting the right information to the right people at the right time.

This means it's crucial to understand the travel risk awareness journey your customers go through, so you know what content is needed and when.

REVIEW YOUR PROGRAM

- How do you share new information or content?
- What delivery channels do you use?
- Is your content delivered to segmented audiences?
- Is your content delivered at specific times related to travel activity?
- Have you automated all or part of your communications?

QUICK WINS

- **Map out content to an awareness journey**
  For the different segments, think about the process customers go through for a business trip and when they need to know or do certain things. You can then map out your documents and videos to fit that journey.

- **Push content to users manually**
  Use this journey map to start pushing content to users manually, rather than pulling them to you. For material that can't be pushed and that your customers have to access themselves, identify where you can reduce the number of steps it takes.

- **Identify and use additional communication channels**
  Use the journey map to find new opportunities to spread content, and partner with other teams to find new ways to ensure relevant information is given at the right time and in the right context.

LONG TERM IMPROVEMENTS

- **Use technology to automate sharing**
  If you can use technology to automate sharing and reduce the team's own manual work, this will speed up activity for everyone. Work with IT and Digital Marketing partners to build your capability to automate. You can automate the sending of relevant information and keeping track of where travelers are in the journey.

PUT IT INTO ACTION

We've included an example customer journey for an experienced traveler who has just joined the company. The traveler will start traveling frequently within the next 3-6 months.

Example journey: first time traveler

	INDUCTION	AWARENESS	TRAVEL	POST-TRIP	REINFORCEMENT
NECESSARY INFORMATION	▪ Travel policies and procedures ▪ TRM resources ▪ How to book a trip, locations that need additional approval	▪ General travel risk management principles ▪ How to manage health, security and cyber risk prior and during travel ▪ What to do if things go wrong ▪ Internal process and resources	▪ Local conditions ▪ Potential threats ▪ Compliance guidelines ▪ Medical considerations	▪ Feedback on what could be improved ▪ What went well ▪ What doesn't add value	▪ Reinforce key security principles ▪ Deep dive in additional topics
WHEN	▪ Within the first month	▪ Within the first 6-12 months ▪ Then every 2 years	▪ Before first trip to a new location ▪ Thereafter depending on risk level	▪ Within 1 week after the trip ▪ Every 6 months	▪ Ongoing for lasting behavior change: 2 mins every 2 months
DELIVERY CHANNEL	▪ New employee onboarding e-learning or training ▪ Welcome emails ▪ Internal social platform posts	▪ eLearning ▪ Face to face training	▪ Pre-travel brief ▪ Destination videos ▪ Email updates ▪ In person briefs	▪ Internal survey tools ▪ Partner with Travel	▪ Email campaign ▪ Follow up training ▪ Micro learning modules ▪ Social platform engagement
INNOVATION OPPORTUNITIES	▪ Keep it short and straight to the point ▪ Ensure material is up to date, visual and relevant ▪ Stand out by making training entertaining and attention-grabbing	▪ Increase interactivity of learning content ▪ Leverage new, more effective technologies	▪ Make briefs more visual ▪ Deliver shorter content pieces closer to when needed, instead of one big update ▪ Include non-security information that adds value	▪ Keep track of employee feedback and use it to continue improving	▪ Experiment with different content types, don't be too conservative ▪ Leverage digital marketing automation software to deliver personalized awareness journeys

TELL THE STORY OF YOUR SUCCESS

Creating a winning awareness program is great PR for your team and the Travel Risk Management function. You will want to tell key stakeholders about the improvements you've made and the impact you've had, both quantitatively and qualitatively.

Demonstrating this impact will also go a long way to securing budget for further long term improvements.

REVIEW YOUR PROGRAM

- What does success look like over a set time frame, e.g. 12 - 24 months?
- What KPIs have you set to evaluate your success?
- What data do you have access to?
- How do you currently gather feedback from users?
- Who are the key stakeholders you need to communicate wins to?

QUICK WINS

- **Define success and the necessary data**
  What's the story you want to be able to tell in 6, 12 and 24 months' time after you've made improvements? Define it up front and this will tell you what information and data points you'll need to gather from IT systems and directly from employees.

- **Measure the impact**
  Set up your project timeline and include touchpoints to manually gather the data you need to show the "before" state and the "after" state. This will let you demonstrate the impact of the changes you've made.

- **Share the success story**
  Present the data and success story to working groups, stakeholders in other functions and senior management. Get them excited about the changes you've made and your plans for the future, to turn them into champions for your team.

LONG TERM IMPROVEMENTS
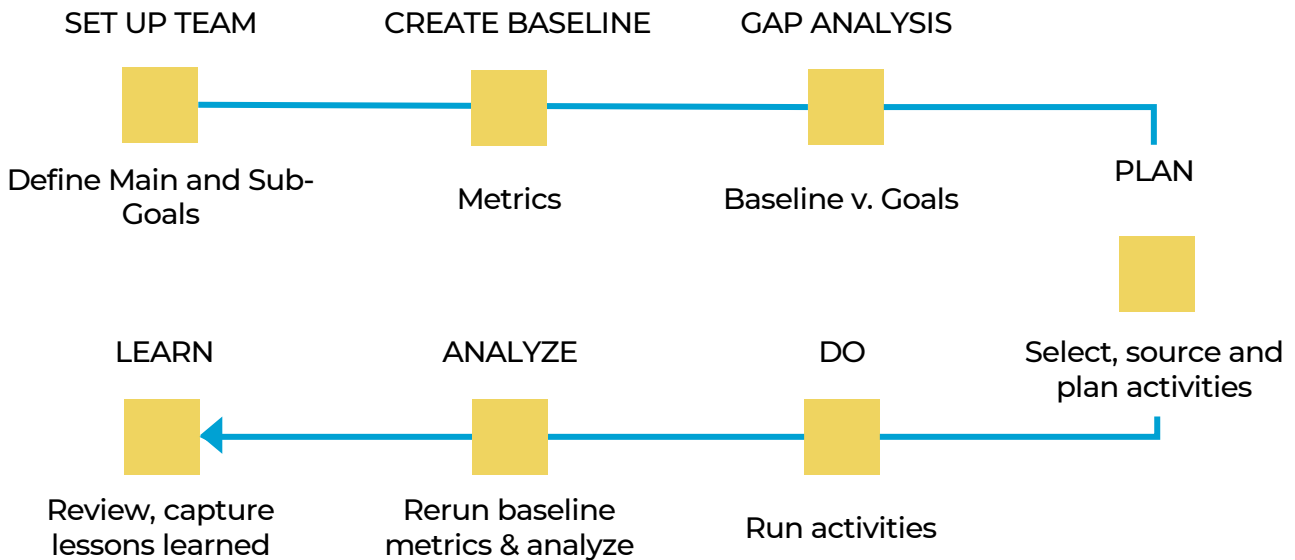
- **Develop analytics capability**
  You'll want to be able to track improvement efforts on an ongoing basis. Build a robust measurement framework that includes usage analytics, qualitative surveys and user feedback. Work with Communications, Digital Marketing, Travel, IT and HR team members to secure ongoing access to relevant data and set up employee feedback mechanisms.

PUT IT INTO ACTION

Take a campaign-based approach to major improvements in the travel risk awareness program, taking the time to gather pre- and post-implementation data.

Campaign Process

SET UP TEAM
Define Main and Sub-Goals

CREATE BASELINE
Metrics

GAP ANALYSIS
Baseline v. Goals

PLAN
Select, source and plan activities

DO
Run activities

ANALYZE
Rerun baseline metrics & analyze

LEARN
Review, capture lessons learned

Example metrics

GENERAL PROGRAM METRICS

Number of people trained vs. identified in the training matrix

Online video views and dropouts

Intranet article and email click through rates

End user survey feedback (example questions):

- "How do you rate the quality of the content?"
- "How useful did you find the training?"

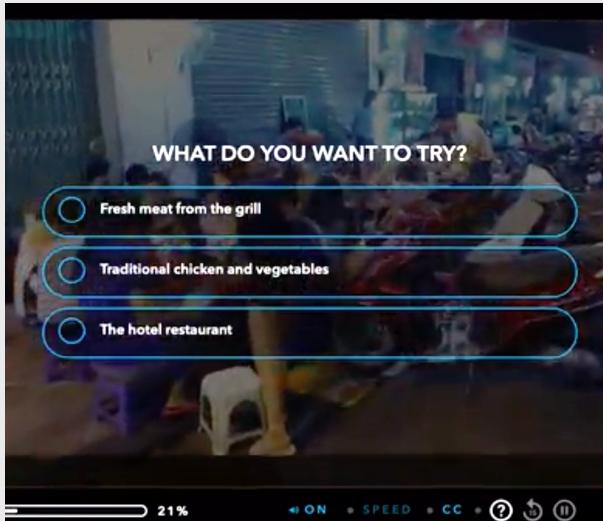### IMPACT METRICS

Number of incidents reported

End user survey (example questions):

- "What's one action you are going to take based on this?"
- "How useful was the pre-trip information to help you stay safe during your trip?"
- "What's one thing you did differently during your last trips?"

GET INSTANT ACCESS TO THE DEMO   SIGN UP NOW

Security awareness training videos that your employees will actually watch*

WHAT DO YOU WANT TO TRY?

○ Fresh meat from the grill

○ Traditional chicken and vegetables

○ The hotel restaurant

21%   ◄ ON   • SPEED   • CC   • ⑦ ⤺ ⏸

→ **INTERACTIVE**

→ **FUN AND ENGAGING**

→ **FULLY CUSTOMIZED**

SAME Solutions helps you keep your people safe and compliant with effective online security training

→ Our programs raise awareness and support behavior change. It's Security Awareness Made Easy.

→ Our cutting-edge information and learning technology make training programs personalized, interactive and effective.

→ We work with you to create an awareness strategy that is customized to your needs.

→ We ensure that our programs are easy to integrate within your company's systems and provide unsurpassed project management support.

SEE MORE AT SAME-SOLUTIONS.COM

*Link: https://www.same-solutions.com/sign-up