



Travel Optimization Checklist

Ensure every dimension of your travel program is resilient in the face of uncertainty.

Optimize your business travel program

Business travel has been steadily increasing. Now is the time to review your travel program to maximize travel experiences while generating ROI.

Common challenges businesses face in this current climate.

- How can I create a travel policy that keeps travelers safe while enabling them to achieve organizational goals?
- What process changes are required so travelers feel cared for yet maintain compliance and control over spending?
- Where can we include health and wellness tips to keep our employees happy, healthy, and engaged while traveling?
- Which policy changes can help us achieve our environmental, social, and governance goals?

If these challenges keep you up at night, our Travel Optimization Checklist is for you. This resource will help you build an adaptable travel program that covers the key areas of communication, traveler experience, health and wellness, and supplier management.



Communication



Goal: Provide a clear channel for travelers to understand the current state of travel and make better decisions.

Review, approve, and distribute your business travel timelines with stakeholders.

Create a communication plan to regularly inform travelers on safe travel locations, regulatory requirements, policy updates, and resources for women and minority groups.

Test communication protocols and channels for deliverability.

Provide a list of credible websites with the latest information on current conditions and regulations by location.

Clearly articulate required traveler profile updates and documentation for domestic and international travel.

Prompt travelers to check with organizations directly to confirm any additional rules for outside visitors.

For office employees, collaborate with HR about returning to the office after a trip.



Traveler experience



Goal: Build a frictionless experience so travelers can make informed purchasing decisions that fit their lifestyle and adhere to policy.

Update your travel policy to set clear limits and advanced booking suggestions for every type of expense from air and rail travel to rental cars, rideshares, and other sharing economy vendors.

Enhance your travel policy by including addendums to address temporary changes such as hybrid work expense policies, handling non-preferred vendors, or when negotiated amenities aren't available.

Publish your T&E policy to a central location and within your expense solution so that every employee has access.

Utilize assessments and pre-trip approval workflows to improve budgeting and help justify the investment in every business trip.

Create policy controls that automatically flag non-compliant expenses or placed outside of preferred vendors.

Streamline and automate your expense submission, review, and approval process to eliminate cumbersome workflows and capture all required data.

Delegate backup approvers in case the primary approver is not available.

Implement post-trip traveler engagement surveys to help guide the crucial task of rebuilding a successful travel program.

Ensure travelers know how to get assistance while traveling, and their emergency contact(s).

Leverage emerging self-service technology with apps that simplify everything from travel booking to checking in or out of hotels.



Health and wellness



Goal: Create systems to keep travelers feeling well—physically and mentally—regardless of location.

Provide opportunities and tools for employees to assess travel risks related to their trip. Compile pre-trip risk assessment reports that detail globally consolidated data, particularly when traveling to high-risk destinations.

Collaborate with human resources to ensure a proper duty of care and address the risks in business travel.

Implement a wellness program to help employees cope with travel-related stressors, at home or abroad.

Supply additional mental health and supplemental insurance resources so that travelers can access quality care regardless of personal coverage.

Check in with employees regularly to ensure they're feeling supported and comfortable traveling on behalf of the company.



Supplier management



Goal: Build strong relationships with preferred suppliers to meet everyone's expectations.

Leverage analytics to shape your travel policy, identify savings opportunities, and encourage better booking decisions.

Regularly communicate with preferred suppliers to identify any influences that may impact availability, rates, or amenities.

Renegotiate terms to account for modified travel volumes so that you can maintain negotiated contracts.

Review contracts for additional fees that may have been recently introduced, such as enhanced cleaning procedures.

Request additional information about changes to service routes due to unforeseen circumstances.

Understand a vendor's sanitation protocols to ensure traveler safety and whether additional fees apply.

Target environmental, social, and governance (ESG) goals with suppliers such as:

- Lowering carbon footprint by selecting vendors that offset emissions via carbon credits or other sustainability initiatives like fuel sources
- Selecting hotel options with environmentally-friendly procedures, policies, and amenities
- Choosing a rental car supplier that offers hybrid vehicles to reduce emissions



Revitalize your travel program for agility and traveler satisfaction

Now is the time to ensure your travel program is optimized and resilient enough to face any challenge. Your employees will have greater confidence knowing you took a thoughtful approach to duty of care and provide solutions that help your organization get the most value from every trip.

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