

# Guidelines for effective business travel management

A template for your policies



# In a world of change, it's likely time to change your travel policy

“The only constant is change” – Greek philosopher Heraclitus. And, this is equally true of business travel. Company priorities continually shift, costs can remain steady or increase, complexities of duty of care evolve with global circumstances, and technology advances more rapidly. Meanwhile, new generations of travelers bring fresh perspectives, expectations, and challenges.

For travel managers, one thing remains unchanged: the need to maintain a sophisticated balance between traveler needs and company goals. This has been and will stay a critical responsibility. A thoughtful, flexible travel policy is the foundation of your corporate travel program and can help you strike that balance.

Traditionally, policies have been used to manage costs and may or may not have been enforced. In many cases they served more as guidelines, especially at smaller firms. Today, however, the purpose of travel policy extends beyond company mandates and plays an essential role in minimizing risk while at the same time supporting travelers' well-being via a guidance-first approach.

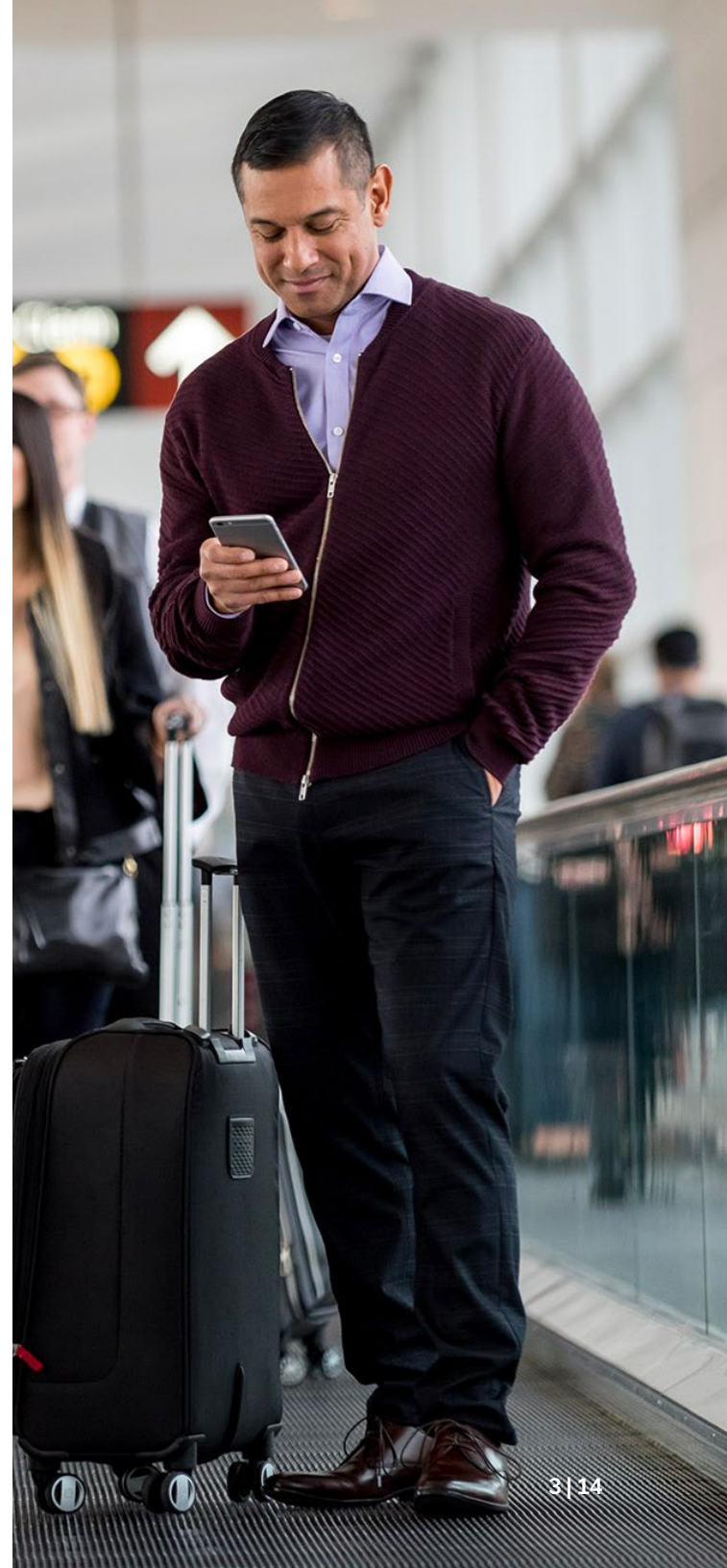
Considering the pace of change in business and the world, your travel policy may need to be formalized or refreshed. Our template gives you a place to begin so you don't have to start from scratch.



# Tips for creating policy that strikes balance

To align company values with traveler needs, a policy requires a strategy where compliance and flexibility are seamlessly integrated and mutually reinforcing. Here are some recommendations for travel managers to achieve that balance effectively.

- 1 Get a feet-on-the-street perspective and lean into reporting:** Your travelers have a wealth of insights to guide change. Set up ways to learn what's working and what's not, such as one-on-one meetings, simple post-travel surveys, or a committee that meets quarterly to provide feedback. To assess gaps, use reporting available through your integrated travel and expense solution to further provide insights into how your employees are interpreting and applying the current policy.
- 2 Justify policy changes and what they mean for employees:** When you roll out a new T&E policy or change an old one, transparency is key. Employees, especially your Gen Z travelers, value authenticity and want to understand the reasoning behind a change and how it impacts their work. Communicate the change clearly. By providing explanations and context, you can build trust and motivate employees to do their best.
- 3 Partner and align with peer organizations and departments from the start:** Because travel management is intertwined with other departmental processes (think HR guidance on duty of care, or IT-driven initiatives, like AI), collaboration can drive consistency across the organization. This approach not only helps build cross-functional relationships but also establishes you as a key decision-maker for changes impacting your program and helps ensure you can rely on these departments for support.



- 4 Align policy with your organization's goals:** Business travel supports such objectives as improved profitability, sustainability, and innovation with AI and other tools. Make sure your travel policy supports your organization's objectives and reflects your culture. By doing so, you demonstrate alignment with leadership priorities and provide valuable insights when reporting on company progress. This alignment helps showcase how your travel program supports broader organizational goals and fits into the overall strategy.
- 5 Ensure employees have up-to-date information about health, safety, and security:** Your employees need pre-trip details about political, health, and other risks associated with their destination, so they can avoid unnecessary hazards. And make sure you're prepared for and attentive to the concerns of diverse employees – including those who may have safety or social concerns related to ideological or lifestyle differences, or those with physical or mental disabilities.
- 6 Add sustainability to your policy manual:** More companies are looking to reduce their carbon footprints and ensure compliance with industry and government regulations, and your travel policy can drive both. Additionally, incorporating sustainability into your policy aligns with the values of many travelers who are committed to protecting the planet. See our [sustainability policy template](#) to help guide your sustainability approach.
- 7 Consider offering a high level of flexibility to your travelers:** With the rise in travel delays, cancellations, transportation strikes, and geopolitical factors causing disruptions worldwide, it's essential to empower travelers to adapt quickly, make informed decisions based on their immediate circumstances with the ability to rebook how and where they want. Flexible policies enable your people to select hotels, flights, and rail options that reflect their personal preferences, align with their values, and promote work-life balance.





## A two-part strategy to policy-making success

### Part 1: Simplify Your Policy

Communicate policies in straightforward, commonsense terms with the fewest words possible. Keeping things simple takes effort but it's important to avoid ambiguity in your policy.

- Use easy-to-understand language in a conversational tone.
- Structure policy in an intuitive manner by topic with bullet points or numbered lists to break down information.
- Provide practical examples to illustrate how the policy applies to common scenarios.
- Use visual aids like infographics, tables, charts, and pictograms explaining options.

With a simplified policy now established, you're ready to begin educating users and securing their buy-in so they adhere to the new framework.



## Part 2: Devise a Strategy to Drive Adoption

This is where marketing your program guidelines comes into play, providing employees with the context and rationale behind the guidance in an educational, fun, and interactive manner. Your travel policy should not try to pack in every detail, but instead use related materials to guide the policy and your employees.

Here are a handful of awareness and enablement tactics to direct employees to your policy and accompanying resources:

- **Digital newsletters & blogs:** Feature stories, research, and case studies from travel partners to support and give credibility to your policy. **Tip:** Highlight how your company's values align with those of travelers within your policy. This approach will help gain more support for your program from employees.
- **Brochures and infographics:** If you have an internal marketing team, consider working with them to develop visually appealing educational materials for travelers. If your budget or resources are limited, you can design your own brochures using user-friendly online tools like Canva or Adobe Spark, which offer customizable templates. Additionally, Microsoft Word and PowerPoint also provide brochure templates.
- **Video messages:** Like mentioned previously if you have a marketing team to support you on such projects, produce short, animated, or live-action videos summarizing key policy updates. **Tip:** Infuse emotion like humor or use storytelling to make the content engaging and memorable.
- **Interactive live and virtual meetings:** Invite guest speakers who are subject matter experts on the policy-related topics you are discussing.
- **Gamification:** Implement gamification strategies such as quizzes or trivia games where employees can earn points or badges for correct answers, making learning interactive and fun.

These are broader suggestions, of course. Read on and you'll find specific enablement tips for specific policy areas.

# Real-world guidance based on real-world experiences

Real-world issues – including cost control, duty of care, and employee satisfaction – drive your travel policy. Here we provide experience-informed tips and examples of areas to include in your policy, along with targeted ways to market the information to employees.

## Keep your travelers safe

Risk management and duty of care are essential for companies and their employees, and therefore a critical component of your program and policy.

### Policy considerations:

- Consider a flexible, multi-channel booking policy that allows travelers the most options when they need to quickly make a change.
- Clarify whether insurance is covered by the company or if employees need to insure themselves.

### Marketing your policy:

- **Host a duty of care virtual meeting:** Create a meeting series focused on safety and invite a duty of care expert to speak. Highlight the importance of compliance by explaining that booking through approved methods ensures traveler safety by maintaining full visibility into booking details and itineraries.
- **Organize a lunch and learn:** Conduct a lunch and learn session to educate employees about available travel resources. Cover topics such as crisis hotlines, in-trip assistance, and travel updates and alerts.
- **Feature booking tool benefits in a blog:** Write a blog post showcasing booking tool features like [Concur Triplink](#), which offers neighborhood safety scores for women and LGBTQ+ individuals, and delivers risk alerts for potential strikes, protests, or flight cancellations. Include a video [demo](#) that highlights key features and instructions on how to use the tool.



## Real-world problem resolution

**Issue:** Businesses worldwide rank socio-economic challenges, geopolitical shifts, and political polarization as top risks. Travelers are acutely aware of their safety and may avoid areas where their beliefs or lifestyles clash with the local environment. For instance, women in regions known for violence against women or LGBTQ+ business travelers—32% of whom have felt in immediate danger while on a business trip.

**Resolution:** Develop guidelines for interacting with local cultures and addressing potential sensitivities, with a focus on considerations for women, LGBTQ+ individuals, and various religious and cultural backgrounds. And, highlight the policies and flexibility in your program that can accommodate itinerary changes, cancellations, and rerouting, as they may become necessary during a crisis.

## Commit to mental and physical well-being

When employees are away from the comforts of home and family, you want them to feel cared for so they can take on the day at their best on behalf of your business.

### Policy considerations:

- Work with HR to see if you can include mental health days during or after extensive travel periods without penalization.
- Allow flexibility in travel arrangements, such as choosing non-stop flights or allowing upgrades for trips longer than 6–8 hours.
- Ensure the policy is inclusive and provides equal opportunities for all eligible employees. Remove bias and consider everyone from a budget perspective. Business class is either in or out. It shouldn't exclude based on position or grade.
- If your company allows, integrate "bleisure" travel—combining business and leisure travel—into your program to help reduce business travel burnout. Policy recommendations include:
  - Define eligibility criteria for employees who can participate in bleisure travel.
  - Outline a clear approval process, specifying the necessary approvals from supervisors or HR.
  - Clarify which expenses are covered by the company (e.g., airfare for the business portion) and which are the employee's responsibility (e.g., additional hotel nights for leisure).
  - Provide guidelines for submitting and reporting expenses related to both the business and leisure portions of the trip.



### Real-world problem resolution

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**Issue:** Elevated anxiety and depression rates, exacerbated by the pandemic, make employees more hesitant to travel, particularly to regions with high cost-of-living pressures, frequent natural disasters, and prevalent security threats like protests, violence, and terrorism.

**Resolution:** Offer pre-travel briefings that include mental health tips and coping strategies. Ensure employees have access to emergency contacts, such as mental health crisis hotlines and support services. Additionally, encourage employees to schedule leisure activities to help them decompress during business trips.

### Marketing your policy:

- **Develop a Digital Tipsheet:** Create a digital guide that includes stress relief techniques for travelers, such as meditation practices and simple exercise routines that can be done without a gym or equipment.
- **Establish an Intake Process for Lodging Preferences:** Implement a process to gather employees' top-rated Airbnb recommendations and feature these in your next internal newsletter. If your policy allows for alternative lodging options that may include leisure travel, use this opportunity to provide clear booking guidelines for accommodations.

### Account for shifts in business travel

The rise of remote, hybrid, and work-from-anywhere business models have had a notable impact on business travel. Whether it's returning to office for in-person team building events or meeting clients face-to-face, a remote workforce requires a policy that supports them.

### Policy considerations:

- Offer clear guidance on obtaining necessary travel approvals and identify opportunities to automate the process for both travelers and approvers. Also, ensure the approval process is meaningful and efficient, rather than a routine formality. Reflect on the purpose of each approval and determine its necessity in each instance.
- Specify what expenses are covered when traveling between the employee's home office and their company office (e.g., transportation, accommodation, meals).
- Establish guidelines for safeguarding company information while traveling include using secure Wi-Fi networks and avoiding the use of public computers.

### Marketing your policy:

- **Share Conference Insights:** Encourage employees to share their experiences and key takeaways from recent conferences. Amplify these stories to your employees, while also referencing relevant remote work travel policy guidelines.



### Real-world problem resolution

**Issue:** It's not uncommon for remote employees to temporarily live in other countries, or continents, outside of their home office for extended periods of time.

**Resolution:** Partner with your finance and legal departments to get ahead of tax-related risks. Educate employees on their tax obligations, as well as the company's, based on location and length of stay. Be sure to also clarify responsibilities for obtaining visas, work permits, and any other necessary documentation for international travel.

## Eliminating the gray areas

A traveler lands in New York City, but their bag doesn't. With a customer meeting fast approaching, they must buy toiletries to hold them over until the luggage arrives. Or, because they're human, they forgot to pack a toothbrush. It can be easy for travelers to get confused about what is and isn't reimbursable, so get granular to improve clarity and compliance.

### Policy consideration:

- Include a list spelling out acceptable, and unacceptable, travel-related expenses.

### Marketing your policy:

- **Organize a giveaway:** Launch a giveaway that rewards employees for completing a brief quiz designed to educate them on these nuanced policy areas.

## Food and entertainment: Separating essential from extravagant

It's important for people to refuel and recharge while traveling for business, but there should be clear limits between personal and business expenses. This means setting limits or ranges.

### Policy consideration:

- Adjust price by location. Dinner in Tokyo, for example, usually costs more than in Madrid. If a traveler is regularly over their allotment, dig into your T&E's solutions reporting capabilities to understand why. From what you learn, consider setting daily caps by region or country.

## Marketing your policy:

- **Create entertaining videos:** Produce short, engaging videos that illustrate the policy using humorous scenarios or animated characters. For instance, a video series featuring a quirky character handling different dining situations can effectively demonstrate what is considered essential versus extravagant.

## How do you handle outliers and exceptions?

No policy can cover every possible situation or context. Build in some flexibility to make sure employees aren't left paying for things that, given the circumstances, should be covered.

### Policy consideration:

- Explain how to request an exception to the reimbursement policy. Tell them how to get preauthorization for such exemptions.



# A template: Detailed tips for making and upgrading a policy

## Accommodation

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### Your policy should include:

- All preferred booking methods (e.g., travel agent, online booking tool, or supplier direct using preferred suppliers)
- Special instructions for sending supplier-direct booking information
- Guidance on how employees should manage conference bookings outside of the approved booking method
- Who is responsible for travel cancellations and for claiming reimbursements
- Your organizational stance on class of service hotel reservations with non-refundable deposits

## Travel

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### Your policy should include:

Which suppliers (if any) are preferred.

Which booking methods are preferred (your preferred online booking tool, chosen travel agency, or supplier direct) for:

- Air travel
- Rail travel
- Lodging
- Ground transportation, rental cars

What range of fares are acceptable, such as lowest logical fare in coach class, etc. It should also include a section on:

- Personal car use for business
- Mileage reimbursement standards
- Trip and car insurance coverage for travelers
- Your organizational stance on class of service (economy, basic economy, premium economy), seat upgrades

### Additional travel considerations:

- Do you encourage use of sustainable transport?
- When is it okay to take the next available class of service (business, first-class, etc.)?
- Would you rather travelers use public transport or taxis vs. personal cars? If so, when?
- How far in advance must trips be booked?
- Is preapproval needed before employees book travel or only if the cost is over a certain value?
- What size car can I book?
- Can I utilize limo/town car services?
- Can the meeting be done virtually to support sustainability goals?

## Travel-related expenses

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### Your policy should include:

A list of travel-related expenses acceptable and within policy, as well as those that are not. For example:

#### Acceptable:

- Baggage, upgrades and advanced-seat bookings
- Parking
- Foreign-currency charges
- Visa, passport, or related travel fees
- Reasonable tipping for services
- Laundry service/dry cleaning

#### Unacceptable:

- Mini-bar contents
- Movies/videos
- Parking or traffic fines
- The loss/theft of personal items
- Child and/or pet care
- Personal car maintenance or damage to personal vehicles while on business

## Food and entertainment

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### Your policy should include:

Reasonable guidelines on meal prices; explain what is covered by a per diem, if utilized; provide guidelines on when to claim meals; and explain any other ambiguities surrounding food/entertainment.

- General meal expense guidelines
- Client or team-building meals/entertainment cost; and whether the manager or most senior person should be the one expensing the meal.
- If alcoholic beverages can be claimed
- Limits per person



## Integrated T&E keeps travelers happy and compliant

Having the right travel management solution in place can simplify setting and adjusting your organization's travel policy, managing costs, ensuring duty of care, and improving the employee experience. Equally important is having an expense management solution working alongside your travel tool.

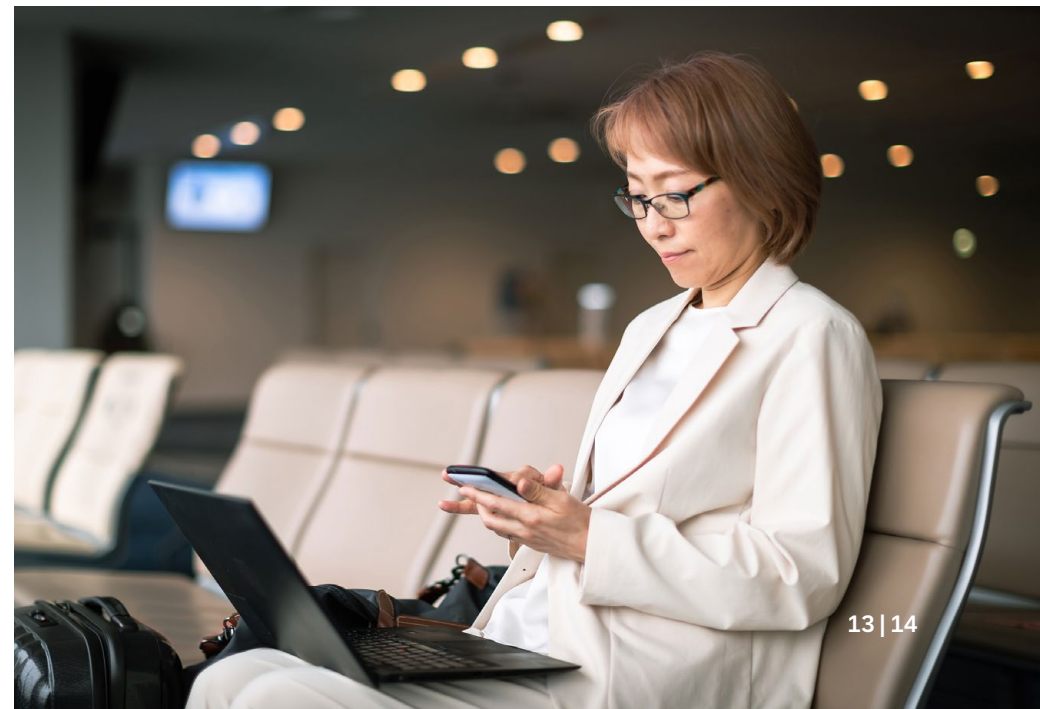
A unified travel and expense platform offers an end-to-end experience, allowing employees to request travel pre-booking (if required), book trips, submit expense reports, and accelerate processing and repayment while helping travel managers perform their not-so-simple balancing act of cost and flexibility. If the two processes aren't integrated, travel managers, finance teams, and leaders can have difficulty obtaining the insights they need to efficiently and effectively run the business.

With easy-to-use, intelligent, and automated T&E solutions:

- Employees can request pre-approval, book travel, submit expenses, and approve reports while on the go with in-app guidance that leads them to policy compliance while allowing them to focus on their primary work instead of paperwork.
- Travel managers can more easily change and enforce policies, improve duty of care, help employees make sustainable choices, and provide the flexibility travelers want.
- Budget owners can see booking, itinerary, and spend data all in one place, get budget alerts, and provide pre-approvals to manage spending before it takes place.

In addition, the right travel and expense technology can reduce or eliminate paper, enable centralized tracking of all T&E spend, and increase productivity – a valuable benefit when talent and budgets are tight. Artificial intelligence embedded in automated T&E solutions extends the benefits by improving monitoring of budget vs. actual spending, flagging out-of-policy purchases, and analyzing massive amounts of corporate travel data.

For travel managers and other business leaders, the improved insights of travel and expense empower better real-time decision-making and deliver the agility every organization needs when change is the one constant.





## Clear travel policies, confident compliance

**It's a straightforward concept that takes thought and focus to become reality:** Make your travel policy relatable and easy to understand, and your travelers will be more likely make the compliant choice. By following the tips and strategies in this guide, and leveraging intelligent technology solutions, you can effectively balance employee and company expectations and lead your program with confidence.

Download our [Sustainability Policy Template](#) to learn how you can build an eco-strategy into your travel policy. Find out more about business travel management at [concur.com](https://concur.com).

