

Uniglobe[®]Travel

Travel Policy
during **Covid19**

Travel
Well

The Travel Policy

A travel policy is essentially a company's rules and procedures policy, that outline how travelers are supposed to book travel, travel arrangers should approve or book and expense travel for business purposes. Preferred company vendors. Approval process for trips that exceed typical limitations. Reimbursement process. Permitted and not permitted expenses.

It is a way to **have control** on all travel related **expenses**

It is a way to **uniform** buying & traveling **procedures** within an organisation

It is a way to **maximise gain(s)** with supplier(s)

Since COVID19

- It is a way to protect and secure your travelers -

The Travel Policy

Since COVID19

- Lots of companies and organisations **relooked / updated** their **existing policy**
- **Created** a travel policy **in case of non existing**



WHAT with liability?
HOW to start with it?
HOW to implement?
WHAT to change?

Every TP is company specific regarding to the business and travel purpose.

We recommend everyone to think different and we strongly advise our customers to not pickup travel as it was and not to continue as if nothing happened

We can advise with some 'systems' to think about

Business Travel

Four components will need to exist to create business travel.

Uniglobe's role will be more critical than pre-COVID to support the business to travel



Business Travel

What constitutes the need to travel will be different now and businesses will need help defining this.

Travel that is critical to the day to day business or can show positive ROI will still have to occur.



Business Travel

Government restrictions and visa requirements are critical.

As is the ability to get travel insurance and supplier availability/suitability.



Business Travel

The traveler will need to have confidence that they can travel safely.

There is a need to ensure changes to policy etc don't increase the anxiousness of the traveler and their family.



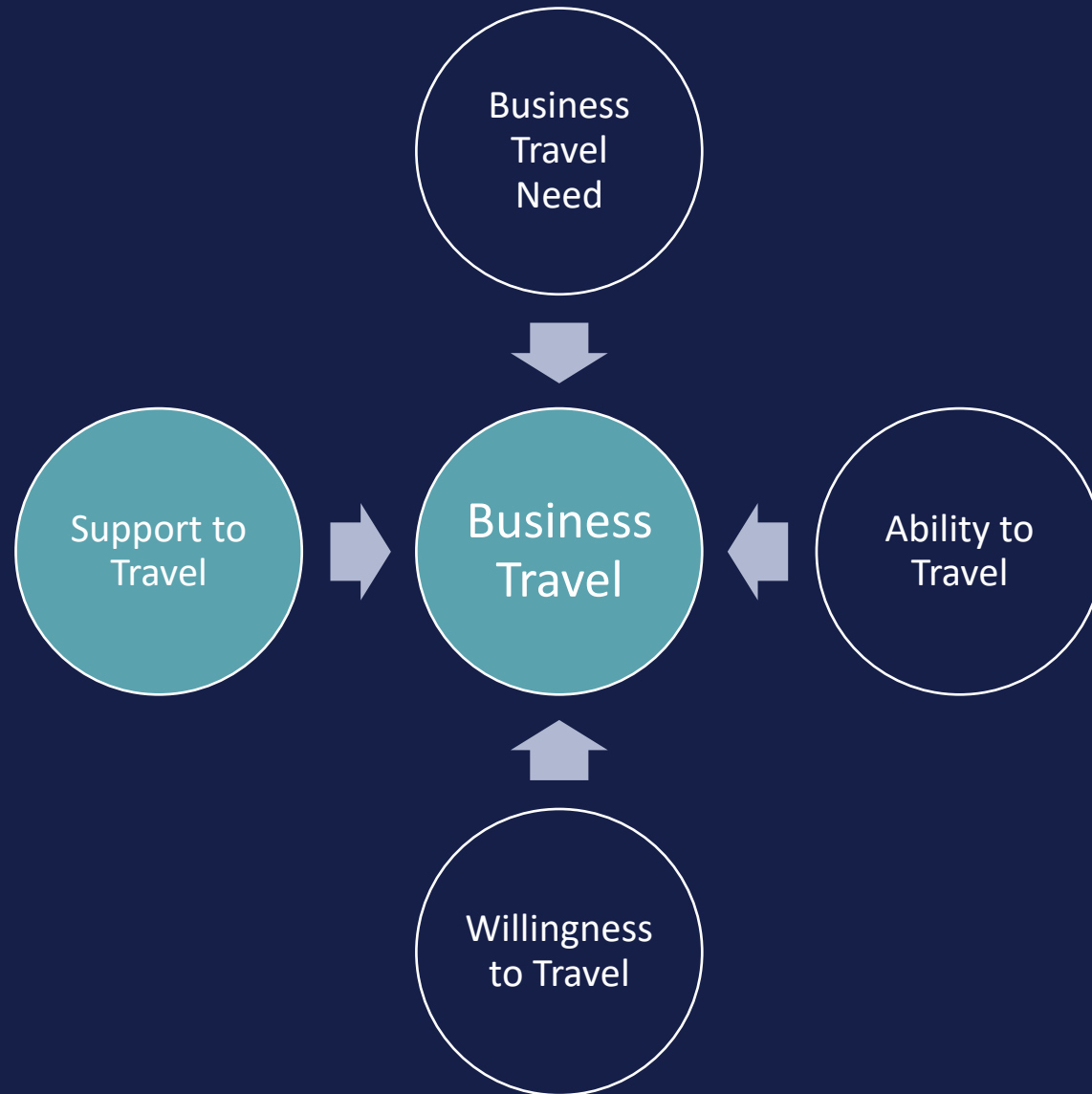
Business Travel

Shift from booker to consultative partner

Guide instead of provide

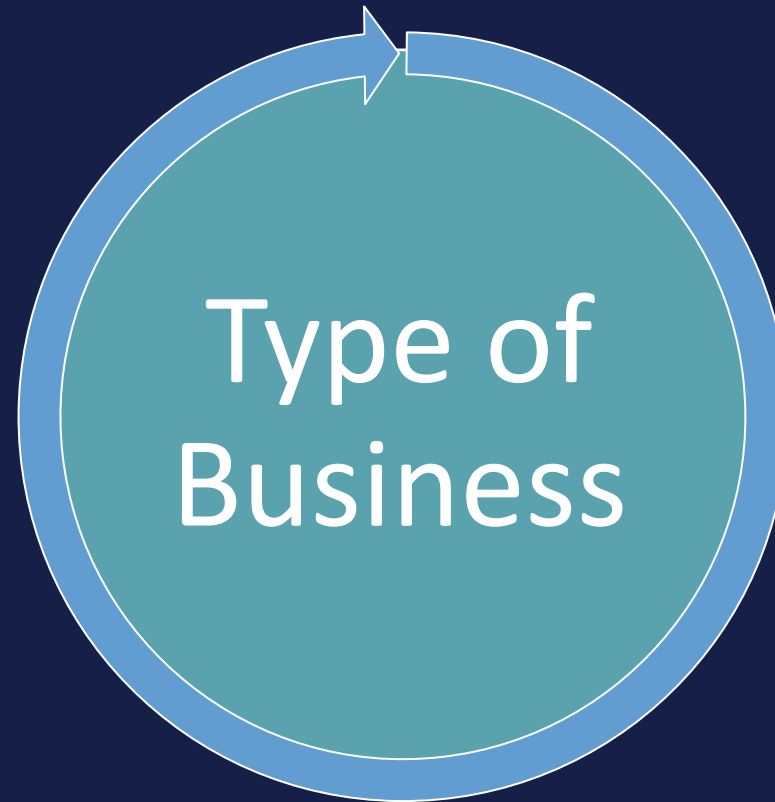
Create value through knowledge of:

- Destinations
- Regulations
- Suppliers
- Insurance and other support products eg. Hygiene needs



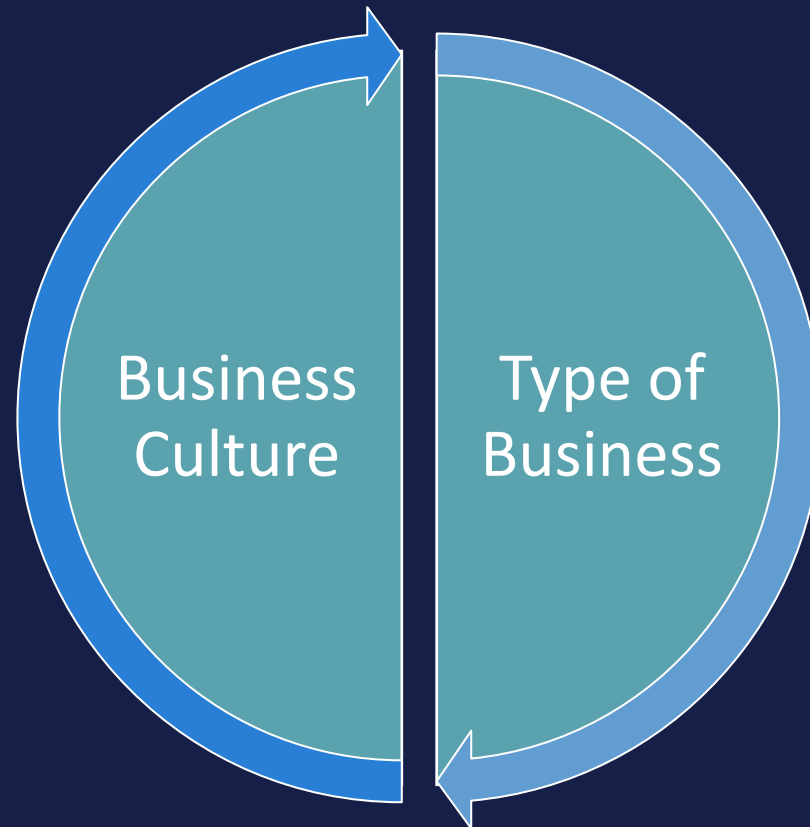
Support to travel - UTP

- What type of business are you in
- Scale/size
- Business performance
- What impact has COVID had on the business – positive or negative



Support to travel – UTP

Company culture
Work environment of employees
Company mission
Values
Expectations and goals
Talk to all people to understand
this don't just take managers word
for it



Support to travel – UTP

Can be as simple as 1 clear objective but shouldn't be more than 3-4 to ensure focus and may include:

- Compliance
- Cost reduction
- Employee satisfaction & engagement
- Safety
- Traveler Wellbeing

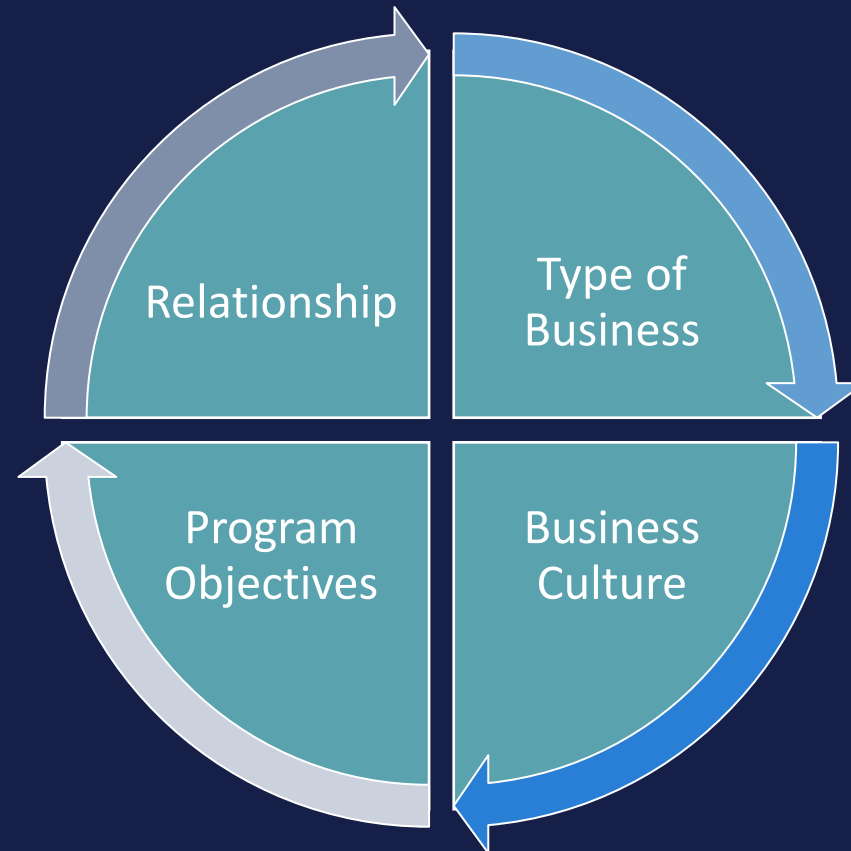


Support to travel – UTP

Relationship with Uniglobe

Extends the relationship to be more consultative and directive

Booker is transactional and the traveler makes the decisions



Types of Travel Policies

Open

Traveler decides
usually with pricing
caps

Tech Companies
Start-Ups

Guidelines

Recommendations on
who and where

Professional Services
Retail

Mandated

Specific traveler
behaviours and
suppliers. No gray
areas

Manufacturing
Mining
Government

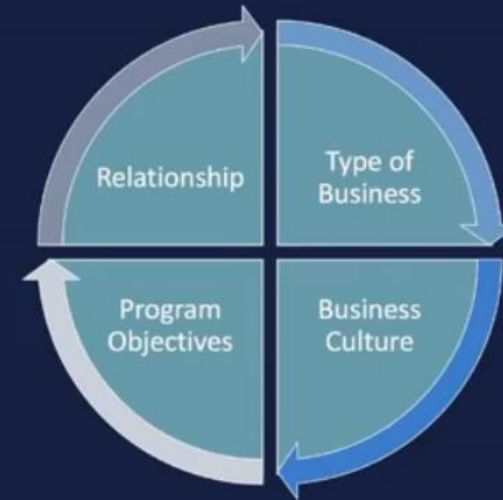
Travel Policy Components

- Purpose
- Communication, Training and Feedback
- Coverage
- Pre-Trip approval and requirements
- Booking process
- Air & Rail Travel
- Accommodation
- Ground Transport
- Expenses and entertainment
- Duty of care and traveler support
- Hierarchy
- Sustainability
- Leisure components
- **NEW** - Refusal to travel

How can I make sure our employees follow our Travel Policy?

- ➔ Choose an effective channel to communicate, preferable several (slack, Teams, email, intranet,...)
- ➔ Keep it somewhere shared & easily accessible (intranet)
- ➔ Keep 1 document – remove all older versions
- ➔ Make sure employees understand the Travel Policy
- ➔ Involve all parties in the set up (finance, travelers, HR,..) to create commitment & acceptance

What should we do differently during COVID period?



- Accept that travel will be different for a uncertain period of time
- Accept that some measurements to safety will generate 'temporary' extra costs
- If your main goal was about cost saving, this focus should change towards safety & people's wellbeing. Create a statement relating to COVID and how this policy now addresses **traveler wellbeing** in relation to it.
- Review Policy frequently & include feedback from travelers and TMC
 - ➡ people are nervous and want the company's confirmation about their safety
- Communication is key – use as much channels as possible!

What should we do differently during COVID period?

- Pre-trip approval
 - ➔ clear guidelines on what is required travel, who can approve what
 - ➔ where can health requirement for travelers be found?
 - ➔ work with levels of risk per destination and indicate clearly when travel is allowed
- Booking process
 - ➔ encourage offline bookings to ensure latest information by the TMC
 - ➔ focus should be on reliable & flexibel suppliers and not lowest logical fare
 - ➔ bookingtool: check if it fully supports new Travel Policy, if not, work offline

What should we do differently during COVID period?

- Air, rail, accomodation and ground transport
 - ➔ reduce the number of suppliers to ensure they fully meet your Travel Policy
 - ➔ determine minimum criteria for supplier selection (i.e.touchless check-in)
 - ➔ evaluate every supplier after the trip & adjust policy if necessary
 - ➔ ratings based on cleanness instead of stars
 - ➔ determine & stimulate low risk behaviour (i.e. stairs in stead of elevators, avoid door handles, use private taxi instead of public transport, Uber, stimulate use of corporate credit cards or payment by TMC...)
 - ➔ encourage travelers to stay in the hotel & facilitate hotel expenses (i.e. gym)

What should we do differently during COVID period?

- Duty of care
 - ➔ legal obligation AND moral obligation
 - ➔ focus on traveler wellbeing – involve Human Resources
 - ➔ reduce travelers stress - develop contact requirements
- Hierarchy
 - ➔ accomodate all staff in the same hotel & differentiate by room types rather than hotel choice
 - ➔ consider private jets if necessary

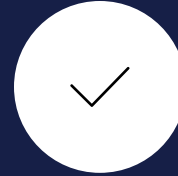
What should we do differently during COVID period?

- **Sustainability:** future focus 'clean is the new green'
- **Bleisure:** stop combining business & leisure travel, only short-term
- **Refusal to travel:** some staff may not want to travel.
 - ➔ Travel Policy needs to accept this and plan for it
 - ➔ message has to be that the company is doing all it can to guarantee the safety of its employees at all time.
- **Measuring success:** evaluate every month
 - ➔ Employee confidence to Travel Score
 - ➔ Employee satisfaction to Travel Score
 - ➔ Planned Travel Cost vs Actual Travel Cost

Uniglobe's advice

The ideal Travel Policy should be:

To make the introduction of a new Travel Policy, these 4 tips are key for every company!



Simple & clear to understand (2 -3 pages)



Duty of Care - proof



Clear about exceptions & sanctions

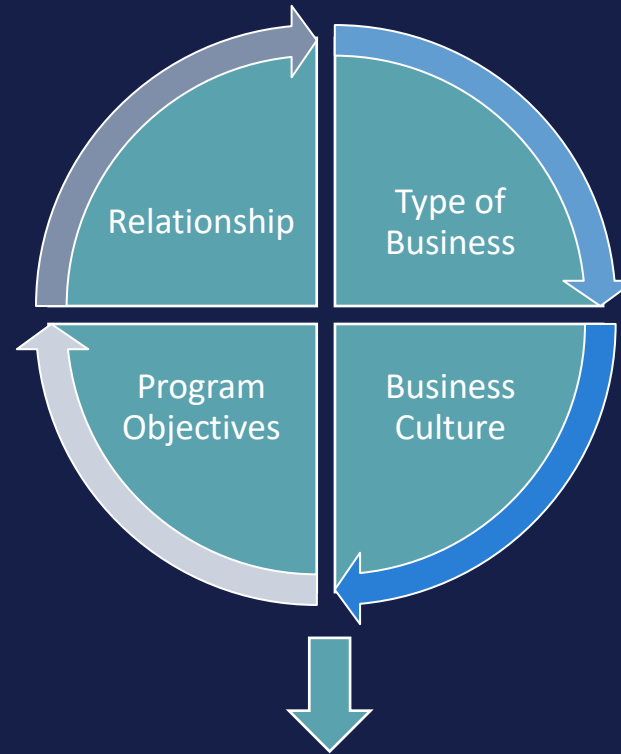


Evaluated & updated every year

Support to travel

Once the UTP created start to review the existing travel policy using a matrix and ask:

- What should you stop doing now;
- What should you do more of now;
- What should you do less of now; and
- What should you start doing that they didn't do before.



Stop	Do More
Do Less	Create

Purpose

It is very important to have an explanation of what the policy is and why it exists. In the past it was often cost-effective travel that ensure traveler well-being. Now it is likely enabling our people to connect in the simplest, safest and most efficient way

<p>Stop</p> <ul style="list-style-type: none">• Having a one way policy, ensure that it includes a feedback loop	<p>Do More</p> <ul style="list-style-type: none">• Match the tone to the culture and the current situation• Explain the why as well as the what• Review and update policy
<p>Do Less</p> <ul style="list-style-type: none">• Talk about compliance and savings	<p>Create</p> <ul style="list-style-type: none">• A statement relating to COVID and how this policy now addresses traveler wellbeing in relation to it• Clear instructions how to contribute to building the policy in the COVID era with new knowledge by using a feedback loop

Communication, Training and Feedback

The organization has to be confident travelers understand the policy and follow it. Travelers have to know the policy to ensure their safety and compliance with insurance and other requirements.

<p>Stop</p> <ul style="list-style-type: none">• Having a one way policy. Ensure that it includes a feedback loop	<p>Do More</p> <ul style="list-style-type: none">• Awareness of the changes to the policy in response to COVID across all company communication channels• Regular updates based on changes and feedback from travelers / TMC
<p>Do Less</p> <ul style="list-style-type: none">• Assuming people are confident to travel• Assuming people are aware of and follow the existing policy	<p>Create</p> <ul style="list-style-type: none">• Online training focused on COVID traveler awareness that must be completed before requesting travel

Coverage

Who does the policy cover? Just staff or contractors, consultants etc

<p>Stop</p> <ul style="list-style-type: none">• Having separate policies for outside travelers	<p>Do More</p> <ul style="list-style-type: none">• Encourage contractors etc to provide feedback to help build travel databank• Ensure all contact details are up to date
<p>Do Less</p> <ul style="list-style-type: none">• Treating contractors and staff differently. A feeling of equity is needed to ensure adherence to policy	<p>Create</p> <ul style="list-style-type: none">• Single travel policy to make it easier to administer and avoid mistakes

Pre-trip approval

The approval process is less about taking choice and empowerment away from the traveler and more about recognizing the organisations duty of care to the traveler. In managing it you need to ensure it doesn't increase traveler anxiety.

<div>Stop</div> <ul style="list-style-type: none">Any travel that is not approved at all levelsAbility of certain levels to override policy at their discretion	<div>Do More</div> <ul style="list-style-type: none">Clear guidelines on what is required travel, who can approve what and cut-off times for approvalHealth requirements for traveler eg. Pre-travel COVID Test, any pre-existing medical issues that can increase risk to travelerCompulsory use of approved air, land and transfer providers in travel requestWork with Visa providers. Many countries have cancelled pre-COVID visasTraveler checklist and health packs
<div>Do Less</div> <ul style="list-style-type: none">Lowest logical fare	<div>Create</div> <ul style="list-style-type: none">Go/No Go test criteria to assist approval process eg. Score to provide level of risk

Booking Process

At booking the consultants knowledge of what the traveler will experience is invaluable. As an example we can use the old world thinking of minimum connection times v's consultant knowledge on how practical they are in some locations eg. Heathrow

<p>Stop</p> <ul style="list-style-type: none">• Using OBT if it cannot enforce all components of the travel policy• Any booking methods outside approved TMC methods eg. Skyscanner	<p>Do More</p> <ul style="list-style-type: none">• Encourage offline bookings to ensure latest information is interpreted correctly by the TMC and not the traveler• Communication around why a cheaper fare or hotel may not be an optimal business decision• Iterative relationship with suppliers to ensure up to date information on cleaning practices, traveler requirements etc to inform booking agents
<p>Do Less</p> <ul style="list-style-type: none">• Push to online to improve margin and reduce cost for customer• Don't talk about savings, talk about value in policy	<p>Create</p> <ul style="list-style-type: none">• Booking form to manage work flow and prioritise departure dates

Air and Rail

It is very important to understand how the supplier is approaching their services. Apart from cleaning schedules, transit location and times and onboard services are changing frequently and vary considerably across providers. There is also no historical data to use for negotiating rates.

<p>Stop</p> <ul style="list-style-type: none">Using suppliers who haven't upgraded their cleaning protocols or provided detailed information on their changes	<p>Do More</p> <ul style="list-style-type: none">Reduce the number of suppliers to ensure they can be fully across their policies and can deliver volume that will increase your influence with themRegular 3 way meetings with suppliers/customer/TMC to stay across changes and build stronger relationships
<p>Do Less</p> <ul style="list-style-type: none">Indirect travelAllowing loyalty status to drive choice	<p>Create</p> <ul style="list-style-type: none">Minimum acceptable criteria for supplier selection eg cleaning policies/coverage in cities travelled to/ frequency of schedules etc

Accommodation

This is where the traveler is likely to spend most time initially as it provides a contained safe environment from a duty of care perspective. Where possible the property should have facilities that discourage the traveler from leaving the hotel eg room service, restaurants, exercise etc

<p>Stop</p> <ul style="list-style-type: none">• Using city caps to limit hotel choice	<p>Do More</p> <ul style="list-style-type: none">• Use of accommodation that reduces exposure to other travelers through touchless check-in and room access, stairs instead of lifts etc• Regular reviews of facilities available at each property
<p>Do Less</p> <ul style="list-style-type: none">• Allowing loyalty status to drive choice• Sharing economy properties eg. Airbnb	<p>Create</p> <ul style="list-style-type: none">• Minimum acceptable cleaning protocols• Think cleanliness rating rather than star rating

Ground Transport

This has the potential to be the "weakest link". While the major, airports, airlines and hotels have already adopted stringent cleaning protocols there is concern that this is more difficult with transfers due to the volume of independent operators and potential exposure to large numbers of the local population

<p>Stop</p> <ul style="list-style-type: none">Using public transport and local taxis	<p>Do More</p> <ul style="list-style-type: none">Private transfer companies ensuring cleaning matches minimum levels eg. Every trip not twice a day
<p>Do Less</p> <ul style="list-style-type: none">Sharing economy eg Uber, Grab etc	<p>Create</p> <ul style="list-style-type: none">Minimum acceptable cleaning protocols

Expenses and Entertainment

This is often the most rigid part of travel policies. While a lot of the policy needs to be tightened up this is an area that needs both that and some relaxation in the short term.

<p>Stop</p> <ul style="list-style-type: none">• Limiting any expense that would result in increased exposure to outside community	<p>Do More</p> <ul style="list-style-type: none">• Provision of credit card to all travelers to facilitate touchless payment• Move from per diems/allowances to hotel chargebacks for meals to discourage eating outside• Expand permitted use of hotel facilities that have a cost eg gyms to discourage use of external providers
<p>Do Less</p> <ul style="list-style-type: none">• Counting pennies and focus on facilitating safe connections	<p>Create</p> <ul style="list-style-type: none">• Emergency COVID expenses category eg purchase of masks, tests, unexpected lock-down, diagnosed mid-trip etc

Duty of Care & Traveler Support

This is the core of the policy in terms of outcomes and the COVID environment so all the other components should contribute to this. Most organisations will already have comprehensive policies around their legal obligations for travelers

<p>Stop</p> <ul style="list-style-type: none">• Seeing duty of care as a legal obligation. See it as a moral one.	<p>Do More</p> <ul style="list-style-type: none">• Surpass the minimum requirements to build traveler confidence• Links between the traveler and booker (consider the portal and app)• Focus on traveler wellbeing• Traveler tracking. Know where the traveler is at all times• Access to multiple travel alerts while travelling
<p>Do Less</p>	<p>Create</p> <ul style="list-style-type: none">• Pre-trip detailed briefing pack for all trips regardless of length and experience of traveler• Develop continuous/regular contact requirements for travelers

Hierarchy

Many policies identify VIP services or allow different classes of travel, accommodation etc for senior people. Company culture will be very important in managing this

Stop <ul style="list-style-type: none">• Anyone going outside policy	Do More <ul style="list-style-type: none">• All staff staying in the same accommodation. Use room types to differentiate rather than property• Investigate private jets
Do Less <ul style="list-style-type: none">• Status drive choice	Create <ul style="list-style-type: none">• Safety v's Hierarchy protocols

Sustainability

While sustainability shouldn't be ignored, in the short term health and safety concerns will override it.

“Clean is the new green”

Stop	Do More <ul style="list-style-type: none">Tracking and reporting of sustainability for future benchmarking
Do Less <ul style="list-style-type: none">Supplier choices based on sustainability	Create <ul style="list-style-type: none">Sustainability v's safety/wellness criteria

Leisure Components

If a traveler contracts COVID while on a trip that includes a leisure component it will be the businesses responsibility. It will be very difficult to determine if it occurred while staying for the business component or leisure part. Also people are more likely to be exposed to sharing economy products when they are paying for it.

<p>Stop</p> <ul style="list-style-type: none">• Extending trips to allow leisure components	<p>Do More</p> <ul style="list-style-type: none">• Communication that this is a short-term change to policy due to COVID• Ensuring the minimum duration possible for all trips
<p>Do Less</p>	<p>Create</p> <ul style="list-style-type: none">• Clearly define that travel is for business purposes and what they are

Refusal to Travel

It is possible that some staff will not want to travel or commence travel and then decide they want to return home early. The policy needs to accept this and plan for it.

<p>Stop</p> <ul style="list-style-type: none">• In the initial period holding people to their job description	<p>Do More</p> <ul style="list-style-type: none">• Through the changes to the rest of the policy give people the confidence that their travel will be safe• Give people the flexibility to opt out until others in the business have travelled and report back
<p>Do Less</p> <ul style="list-style-type: none">• Expecting people to accept travel is part of their job and help them to understand why they need to travel	<p>Create</p> <ul style="list-style-type: none">• Criteria as part of the pre-trip approval process that enables a traveler to opt out depending on the type of travel (domestic v's international) or for health reasons for the first 30/60/90? days after travel recommences

Q&A session

Thank you for joining us today

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