

BSBADM406

Organise business travel

Release 1

Learner guide

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Aspire Version 1.1

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Level 1, 464 St Kilda Road
MELBOURNE VIC 3004 AUSTRALIA
Phone: (03) 9820 1300

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Contact details

Participant
Name:
Start date:
Phone number:
Email:
Work location
Name:
Address:
Postal address:
Workplace supervisor name:
Phone number:
Fax:
Email:
Registered Training Organisation (RTO)
Name:
Address:
Postal address (if different):
Phone number:
Fax:
RTO contact name:
Mobile:
Email:

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Before you begin

This learner guide is based on the unit of competency *BSBADM406 Organise business travel*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.



Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none">• Researches and interprets information from various sources in a range of formats to establish and confirm travel requirements
Writing	<ul style="list-style-type: none">• Produces clear, detailed and logically organised texts in required format using vocabulary specific to travel requirements
Oral communication	<ul style="list-style-type: none">• Uses appropriate vocabulary, pitch and intonation to convey relevant information• Listens and asks questions to confirm requirements or clarify understanding
Numeracy	<ul style="list-style-type: none">• Interprets and comprehends a range of everyday mathematical information that is embedded in familiar texts• Uses basic mathematical formula to calculate credit requirements
Navigate the world of work	<ul style="list-style-type: none">• Recognises and responds to both explicit and implicit organisational procedures and protocols and legislative/regulatory requirements
Interact with others	<ul style="list-style-type: none">• Collaborates and negotiates with others to achieve agreeable outcomes, playing an active role in facilitating agreement• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role
Get the work done	<ul style="list-style-type: none">• Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints• Takes responsibility for the outcomes of routine decisions related directly to own role• Utilises a range of features within digital applications to improve personal productivity, optimising software functions for specific purposes

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1 Organise travel itineraries	1A Confirm travel purpose and requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Identify contacts and confirm meeting arrangements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Prepare a daily itinerary	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1D Organise material for meetings	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1E Prepare an itinerary to meet WHS requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1F Provide travel and meeting documents on time	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

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Topic	Key outcome	Rate your confidence in each section
Topic 2 Make travel arrangements	2A Make bookings and reservations	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Arrange travel documents	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Confirm travel arrangements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2D Negotiate alternative arrangements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2E Record travel details	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2F Make communication arrangements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3 Arrange credit facilities	3A Confirm payment methods	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Make credit arrangements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic 1

Organise travel itineraries

A well-organised business trip is more likely to result in successful achievement of the trip's purpose and ensures the traveller remains free of stress. If you are responsible for making travel arrangements, you need to ensure you cover every aspect of the trip from start to finish.

Travel arrangements are usually a compromise between what the traveller wants and what is available. For example, flights to some destinations may only be available on certain days. The process of booking travel can take some time as options are evaluated. The increasing demand for seats, cars, hotels and meeting rooms means that getting the exact flight, seat, fare, car model or hotel room, as well as the right rate, is more likely if bookings are made in advance and in an organised manner.

In this topic you will learn how to:

- 1A Confirm travel purpose and requirements
- 1B Identify contacts and confirm meeting arrangements
- 1C Prepare a daily itinerary
- 1D Organise material for meetings
- 1E Prepare an itinerary to meet WHS requirements
- 1F Provide travel and meeting documents on time

1A

Confirm travel purpose and requirements

The first step in managing a successful business trip is to be organised. There are many details that need to be researched, selected, booked, arranged, paid for and confirmed. Given the time these activities take, it is not surprising that many organisations outsource this process. At the very least, most organisations have processes and procedures that facilitate effective travel management.

Organising a business itinerary can involve many steps. Here are aspects of a trip that you may need to organise.

Booking and purchasing

- Domestic or international flights
- Hotels
- Train tickets or travel passes

Organising

- Arranging transport to or from airports locally or at a destination
- Arranging meetings, including booking meeting rooms and equipment and preparing documentation
- Organising connections and transfers for train or coach travel
- Rental cars or other transport
- Organising special permission for various activities (such as getting customs clearance to bring in certain items, getting approval to visit a private business or getting permission to use facilities not usually available)
- Arranging for interpreters or using an organisation such as Austrade to facilitate introductions and help organise business meetings

Checking/ensuring

- Ensuring that travel documents (such as passports, visas and work permits) are up to date
- Ensuring items required for business meetings (such as product samples) are freighted to a particular domestic or international location on time
- Ensuring the traveller has access to cash in the local currency, or access to credit facilities (such as an EFTPOS card or credit card that will work wherever they are)

Sourcing

- Sourcing information on the destination and its culture (such as time differences, whether to tip, where taxis are available, common phrases in the local language and business customs)

Setting up

- Setting up communication channels (especially when travelling overseas) that enable the staff member to contact the office and their home in Australia as well as local businesses and contacts (this may include setting up global roaming functions on mobile phones, obtaining reverse-charge phone cards and email accounts accessible from any internet cafe or hotel room)

Travel files

To help you manage travel bookings and business itineraries effectively, keep a file of relevant information handy. This could be in hard copy and kept on hand for you and others to access, or in soft copy and available on your organisation's computer network or intranet site.

Separate files can be kept for each department, each traveller, each business trip, or each key aspect of the trip. Alternatively, all information can be kept in one general file. The system preferred may depend on the amount of travel that various individuals undertake. As you go through the process, keep a record of both the arrangements you make and the associated documentation that is given to the traveller or stored in the organisation's files. Keeping travel files ensures there is a record of what you have done as well as a handy reference for next time a similar booking needs to be made.

Items that your travel files should include:

- your organisation's travel policies and procedures
- the preferences of individual travellers
- airport information and airline and train timetables, or lists of where to access these on the web
- reservation hotlines or websites (including passwords if access is restricted)
- accommodation venues, rates and information on hotels and their facilities
- maps and street directories
- contact details for taxis or limousine services in different locations
- preferred suppliers and other notes and information particular to the type of travel your organisation typically undertakes.

Confirm details and purpose of trip

The first step in organising any travel itinerary is to confirm the details needing to be arranged. Understanding the reason for the trip will help you make suitable bookings and ensure the arrangements you make help the traveller complete a successful journey.

When you organise travel, the purpose of the trip will determine the types of arrangements you need to make and the materials you need to prepare for it. For example, if your traveller is promoting your organisation's products, you will need to ensure they have product samples or brochures available to hand out. They may be planning a formal presentation on the company's products or services, so you may need to prepare an electronic display or overheads as well as arrange for samples. If the traveller is to present to a large audience, you may need to organise a venue and arrange for invitations to be sent out.

Different purposes for business travel

- Visiting branch offices
- Suppliers' catalogues
- Buying or researching new equipment
- Marketing current products or expanding product markets
- Identifying new clients
- Meeting with existing clients, suppliers or other parties
- Attending trade fairs or exhibitions
- Attending conferences or seminars
- Interviewing prospective employees

Number of travellers

As well as knowing which members or staff (and others, such as interpreters) will be making a trip, you may need to confirm some personal details to enable you to make bookings on their behalf. Sometimes the partners and families of travellers are invited on the trip, and collecting all the personal details can take time.

You may also need to know whether they have any special dietary requirements or medical conditions so special meals can be ordered. These requirements usually need to be made at the time of booking or within a set time prior to the flight's departure. If your traveller has a disability, you may need to advise the airline when you book to ensure they receive appropriate service.

Some seats on aircraft are only available to certain passengers; for example, people with no medical problems or people travelling with children.

Be prepared by creating a special file for this data and even creating a template that helps you collect it. Here are details that you will need to be certain of when you make a booking on behalf of another person.

Confirmation of the following details may be required:

- Full name and title (including their middle name)
- Home address and contact details
- Next of kin
- Passport number
- Date and place of birth
- Membership numbers

Organisational requirements

Check whether your organisation has any formal procedures or guidelines for travel. You need to be familiar with the travel policy, procedures and external suppliers used by your organisation.

If the organisation has a policy document, obtain a copy and familiarise yourself with its contents before you start making any travel arrangements. Have a copy of it to refer to as you make bookings.

Alternatively, you could obtain a copy of the guidelines set by another organisation and adapt it for your own purposes. It might also be useful to speak with someone in the organisation who has planned a business trip in recent months.

Here are examples of what a travel policy might cover.

Guidelines

- Operational guidelines to be followed
- Documentation to be completed by the traveller
- Whether membership of loyalty programs is accepted and how points accrued on business travel are to be used
- Whether membership to airline lounges will be paid for by the organisation
- Classes of travel and accommodation for different people or trips

Expenses

- Type and level of reimbursement for travel expenditure
- Names and contact details of preferred suppliers and arrangements or contract details
- The type of transport that is permitted, or whether a particular organisation has been contracted to provide these services
- Allowances regarding organisational credit cards, Cabcharge cards or vouchers

Procedures

- Names of personnel authorised to approve travel and travel expenditure, and the process that needs to be followed in order to get approval for travel
- Accounts (payment, reimbursement and billing) procedures

The business travel budget

You will probably need to work within the budget of the person you are organising travel for, or ensure costs adhere to your organisation's travel policy, which aims to streamline the booking process and manage business travel costs. Many organisations have specific budgets for different aspects of a business trip, or have relationships with preferred providers (typically hotel chains, airlines or car rental companies) that have agreed to certain rates for the organisation.



Meals may have maximum amounts; airline tickets may need to be booked in a certain class or be a particular fare type; daily amounts may be set for hiring cars; hotel rooms may need to be under a certain amount per night or week.

Airline tickets are often the most expensive (and difficult to understand) component of a business trip, and usually addressed in detail in a business travel policy. It is particularly important to keep costs in mind if there is no defined organisational policy on the class of travel and accommodation. Find out in advance from your manager, or the traveller you are making arrangements for, whether a budget is set for the trip and how it is to be broken down.

Example: items inclusive of a business budget

Here are two examples of items that may be inclusive of a business budget. It is essential when making business travel arrangements that information sources are relevant, up-to-date and comprehensive in detail.

Example 1: Guidelines on meals

Refer to the meal expenditure table below for guidelines on meal expenses while on business travel.

Meal description	Maximum spend per day
Breakfast	\$15.00
Lunch	\$15.00
Dinner (including beverages)	\$50.00
Total	\$80.00

These expenses can be claimed from a cafe, restaurant, hotel, airline flight, or other similar food outlet.

Meals can be paid for via the traveller's AMEX card. These charges will need to be reconciled on the monthly AMEX expense claim form. All expenses must be supported by original receipts. The Travel Department will reconcile charges for travellers without an AMEX card (providing copies to appropriate business unit management).

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Example 2: Car hire expenditure

All authorised car hire bookings will be made with our preferred supplier, using the contract negotiated rates as below.

Supplier: Hertz

Car type	1-3 days	4-6 days	7-29 days	30+ Days
Small Auto (e.g. Pulsar)	\$50.00 per day	\$47.50 per day	\$45.00 per day	\$42.50 per day
Intermediate (e.g. Camry)	\$51.00 per day	\$48.45 per day	\$45.90 per day	\$43.35 per day
Full size (e.g. Falcon)	\$52.00 per day	\$49.40 per day	\$46.80 per day	\$44.20 per day

Rates are exclusive of taxes (e.g. GST, airport taxes).

Only request car hire when your accommodation is not within walking distance or a short taxi trip from your workplace or meeting location. Staff travelling in groups should share car hire where possible.

All hire cars must be refuelled before returning to the Hertz location, any exceptions will require authorisation from the business unit manager. If you intend to travel over 400 kilometres during your hire period, you can opt to pre-purchase the fuel package.

Excess reduction is built into the negotiated contract. Travellers are asked to decline all other insurance options. The security of the hire car will be the responsibility of the traveller.

All car hire will be paid for via the traveller's AMEX card. These charges will need to be reconciled on the monthly AMEX expense claim form. All expenses must be supported by original receipts. The Travel Department will reconcile charges for travellers without an AMEX card (providing copies to appropriate business unit management).

Practice task 1

1. Make a list of the reasons why the people in your organisation, or one you have researched, would need to travel.

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2. Review an organisation's travel policy. If you are not employed by an organisation, you will find travel policies of numerous universities available online. Does the travel cover all aspects of the business travel process? If not, what do you think is missing? How does, or would, the document help you arrange travel?

3. What travel budgets does your department or organisation work within? What is the policy on the class of travel or accommodation? You could approach your local council for this information if you are not currently working in an organisation with a travel policy or budget, or do an online search for 'organisational travel budget example'.

1B

Identify contacts and confirm meeting arrangements

The person you are organising travel for may be meeting a variety of possible people: suppliers, clients, prospective clients, government bodies or others. Perhaps they are attending an expo or conference at a location they are unfamiliar with. In order to assist them you may need to be aware of particular contact points, such as the name of the person being visited, the company's physical address and contact details.



Ensure your traveller has all the necessary details, perhaps incorporated into their daily itinerary or in a file of contacts they take with them. If they get lost or are running late, they will need to contact their hosts. If they are attending a trade fair on behalf of the organisation, they may need to contact suppliers or freight companies. They will need the local contact details for the fair organisers.

It is also useful for other staff in your office to have access to all these details. There should always be someone in the office able to contact hosts and suppliers in case the traveller has problems or delays.

Locations and times

Ensure that locations of meetings or other gatherings (such as conferences, expos or dinner functions) are clear and understood by the traveller. Sometimes, especially in a foreign country, addresses and locations are hard to understand. It is important to communicate very clearly in this situation. Speak clearly and use appropriate vocabulary and an effective pitch and intonation (how you use your voice to show extra information, such as whether you are asking a question).

Contact the organisation your traveller is visiting (perhaps as you set up the meeting) and speak with someone who works with the person or people being met with. You will need to listen actively and may need to ask clarifying questions or read back a summary of the details you have noted to clarify that all details are correct. An example of a clarifying question is 'Have I got it right?'

Here is information you should ask for to ensure that the trip is successful.

Location information

- Their physical address (written in English and perhaps the local language – ask someone who works with the people your traveller is going to meet to do this for you)
- A telephone number that can be used to contact the relevant people if your traveller gets lost or needs to contact the company for directions
- Any directions that will make difficult addresses easy to find
- Any instructions that will enable entry to the building or facility
- A map if the location isn't easy to find, or map grid references if your traveller is using a rental car to get there themselves
- Any other information that may be relevant (such as delivery addresses)

Other meeting locations

Don't forget to find out the time of the meeting in the local time, perhaps using a 24-hour clock so there is no confusion. The person who is travelling needs this information if they are likely to be jetlagged or will need to make an early meeting, so make sure they are aware of this.

Remember that meetings are not always held at business offices.

Further details that business travellers may need could include:

- restaurants and cafes if meetings are being held over a meal or if special dinners are being attended
- hotel meeting rooms or business facilities
- shops or retail premises if visits are being made to assess competitor products for warehouse or manufacturing facilities
- convention, conference, expo or fair locations
- other locations where business might be conducted, information gathered or relationships with suppliers or clients developed.

Example: obtain information about location

Myra is the personal assistant to three senior managers. One of her managers, Sally, is planning to meet with a potential new distributor in Bangkok, Thailand. She has never visited them before and wants to inspect their premises as well as talk to them in person.

Myra arranges the meeting, and when she does so she speaks to one of the people Sally is going to meet with. He tells her that the location of their offices is on the outskirts of Bangkok in an industrial area. He says that he will arrange for one of the company's chauffeured cars to come and pick Sally up from her hotel, and also provides Myra with the company's address in case something goes wrong.

As well as emailing this information to Myra, he faxes a copy of the company letterhead to her with the address in Thai, so if Sally needs to she can show this to a local who can understand it and help her get there.

Practice task 2

1. Explain the importance of confirming arrangements for meetings.

2. What communication strategies can you use to confirm that you have accurate details about a meeting's location and time?

3. What verbal communication strategies can be used to facilitate communication when confirming arrangements for meetings taking place overseas?

1C

Prepare a daily itinerary

Once you understand the purpose of the trip and confirm the business travel details, you need to develop a travel itinerary. A travel itinerary is a summarised plan of a trip, setting out the daily travel, business and leisure plans in chronological order. It is a convenient reference for the traveller and any other people who need to know where the traveller will be at a particular time. Well-organised itineraries are important for busy travellers, and should set out everything they need to do and know to ensure a successful, trouble-free trip.



An itinerary is an essential document to prepare because it spells out exactly what is happening at each step of the journey and explains to the traveller where they have to be at what time. As you prepare the itinerary, issues may be raised that can complicate the planning process. This will require you to spend some time researching, booking and confirming the different options available.

Itinerary details

Itineraries may be very detailed documents, or they can simply list basic information. As a general rule, the more information an itinerary has, the less chance there is of the traveller experiencing a problem.

Itineraries can be produced within a template specific for its purpose. There are many Word and Excel travel itinerary templates available online, or you could create your own. The only requirement is that they are clear, detailed and logically organised.

Contact details are of fundamental importance and include the names and telephone numbers of the people travelling, the people the traveller is meeting with and names, addresses and telephone numbers of hotels, airlines, car rental companies, taxi services and so on.

Items routinely included in a travel itinerary include:

- contact details
- travel
- daily schedule
- accommodation
- meals
- currency and expenses
- time zone
- adjustment for personal preferences.

Travel arrangements

When detailing travel arrangements, it is better to provide all available information, rather than leave things out. This allows the traveller to deal effectively with unforeseen occurrences, as well as all the events that have been carefully planned.

Here are details relating to travel that should be accounted for in a travel itinerary.

Ticket collection times and locations

With the advent of e-ticketing for airlines and trains, many tickets don't need to be collected in person. For any tickets that do, ask travel agents or airlines to ensure they are sent to your office prior to the traveller's departure (if possible).

Otherwise, find out where and when the ticket can be collected (often from a ticketing counter at the airport or station) and note these places on the itinerary. If a ticket does need to be collected, note the corresponding reference number for the booking – this may make things easier at the collection point.

Arrival and departure times

Arrival and departure times are one of the most important components of the itinerary, particularly when air travel is involved. As well as arrival and departure times of aircraft, include check-in times and information on the check-in process.

Increasingly, travellers are required to check in for international flights many hours prior to the flight's departure. Also, different airports and countries have varying levels of security (including what can and cannot be taken on board). Ask the travel agent or airline in question what the specific details are for each destination being visited. Remember that people travelling with carry-on luggage usually have a shorter check-in time than those with checked baggage.

Arrival and departure modes and locations

Ensure you include information about where check-in, departure and arrival will take place. Some airports are extremely busy and have different terminals for different flights and airlines, which can cause confusion and delays if the traveller arrives at the wrong terminal. Many airlines prefer travellers to check-in online and present their pre-printed boarding pass at the gate when they are ready to board.

The same applies to rail travel – always include platform and luggage details where possible.

Connection and transfer arrangements

Transport connections and transfers can be complicated. For instance, Australian travellers flying into Los Angeles and then onto another destination in the United States may have to get themselves from one terminal to another to catch the domestic flight. Depending on the airline, terminals can be some distance apart, so the traveller needs to be aware of this – particularly if their next flight is due to depart shortly after their arrival.

Other transfer arrangements include transport between appointments, from hotels to airports and so on. Make sure any instructions the traveller needs to follow are clearly set out, and important points like terminal changes are highlighted.

Transport arrangements on departure and arrival

The itinerary should detail transport arrangements from the time the traveller leaves their home or office. If a taxi or hire car has been booked to take the traveller to the airport, provide the name and contact number of the taxi company or hire-car firm – this allows for the traveller to contact the company if there are last-minute changes to plans. Allow time for possible delays (such as traffic jams).

Provide departure and arrival times, the name of the airline and the flight number. Remember to account for time changes from state to state and country to country, including daylight savings.

Provide details of the transport arranged for arrival at their destination. If known, provide the name and contact details for the transport company. If car rental has been organised, provide details of any driving licence requirements or insurance coverage necessary. If the traveller is being met by a colleague or business associate, provide the name and contact details for that person as well as the meeting point.

Travel to appointments

Transport arrangements should be included for every appointment. Relevant contact details should be provided in case your traveller needs to check or change any arrangements.

An example of this is the following details from an itinerary:

- 8.30 am: Buzz Car Rentals to deliver car to your hotel (Phone: 06 8735 4343)
- 8.45 am: visit timber mill sites as per attached schedule (road map included)
- 3.45 pm: return car to Buzz depot at 133 Johnstone Street, Evanvale (Phone: 06 8735 4343)

Preferred mode and class of travel

The mode and class of travel will be dictated by your organisation's travel policy, the budget available for the trip, time limitations and the availability of flights, seats and other transport such as rental cars.

Sometimes, bookings that are outside the parameters of the travel policy or budget may need to be approved. This might be because seats on a particular flight are full, you have had to book late (therefore making it impossible to access early-bird fares), or the car rental company has already booked out the type of car you need.

Daily schedule

It is important that the time, date and address of each appointment are clearly marked on the itinerary and that contact information is included. Provide the reason for each meeting and the names and titles of all those attending wherever possible.

An itinerary should show these relevant details for each specific appointment: date, time, purpose, address, name and organisational role of each person who will be present at the meeting and their contact details.



To help the meeting run as smoothly as possible, attach relevant information to the itinerary, such as the background of attendees or organisation, and a meeting agenda. If this information isn't included, attach a note advising where to find the material. For example, you could include a reminder that the hand-out material to be used for the meeting has been forwarded to the hotel, or that the traveller should receive papers for the meeting via email before the appointment.

Accommodation arrangements

Many trips take more than just one day and require overnight or longer accommodation. You need to book suitable accommodation that complies with your organisation's travel policy, suits the itinerary of the traveller and meets their personal preferences.

Detailed accommodation arrangements should be provided on the itinerary, including the name of the hotel or motel, its full address, email address, telephone and fax numbers. If you have a brochure or picture of the accommodation, include that for your traveller's reference. If the traveller is staying at a private address, contact details should also be provided wherever possible.

A copy of the confirmation documents should be included with the itinerary to clear up any discrepancies when the traveller arrives. On rare occasions, a hotel may accidentally delete a reservation from its computer or double-book a room. Proof of the reservation will normally secure your traveller's accommodation. Here are some aspects to consider when arranging accommodation for a business traveller.

Availability

Availability of accommodation

At certain times, hotel rooms in most major cities will be completely booked out. This could be a result of religious or cultural holidays such as the Chinese New Year, sporting events such as the Commonwealth Games or business events such as conferences and conventions. It pays to book in advance wherever possible, to ensure you get the accommodation you need and cheaper room rates.

It could also be worthwhile delaying a trip if a major event is being held in the destination your traveller plans to visit. If this isn't possible, you may need to seek out different accommodation types (hotels, motels, serviced apartments, bed and breakfasts etc.) in locations that minimise disruption to the trip. This may mean booking a room that is out of the central business district, resulting in unavoidable travelling time to and from the hotel.

Rooms

Number and type of rooms

Decide the number and type of rooms required. Single rooms are needed for each business traveller but, on trips where partners are included, double rooms or suites may be necessary. Some travellers may be happy to share rooms if a large number of staff are visiting the same place at once; for example, on a corporate sales conference.

Accommodation type

Type of accommodation

Find out if the traveller has a preference for a hotel or apartment. If the traveller is staying in the same place for a long period of time, they may prefer to stay somewhere where they can semi-self-cater (such as make their own breakfast, tea and coffee), and do laundry and conduct meetings. If so, an apartment may be more suitable. If you are not familiar with what serviced apartments offer, do some research online about those on offer by different companies. The type of accommodation you can book will be influenced by the budget available for the trip and your organisation's travel policy.

Accommodation location

Location of accommodation

Consider the accommodation's vicinity to local restaurants, taxi stands, airports, train stations and the organisations or locations your traveller will be visiting.

Meal times and locations

Apart from inclusion in some conference packages, meals are usually excluded from the price of accommodation and should be arranged separately. Occasionally breakfast is included or can be arranged for an additional charge. Most hotels have dining arrangements, but occasionally they do not.



You need to take into consideration any dietary preferences your traveller may have; for example, they may have vegetarian, gluten-free, halal or kosher requirements. Source appropriate dining facilities in the vicinity of the hotel and include details on the itinerary.

If your traveller is being entertained, or arrangements have been made for them to entertain colleagues and business associates, include details of the entertainment venue and a contact name wherever possible.

Expenses and currency

The traveller must have a means of paying for expenses, incidental costs and other items while they are away. This could involve arranging a cash advance (in the local currency of the destination), a corporate or personal credit or EFTPOS card that can be used at the destination, traveller's cheques or cash cards. (Cash cards are issued by companies such as Travelex and are like 'electronic' traveller's cheques that can be used at EFTPOS machines worldwide.) Often, a combination of payment methods will be used. The traveller may need information about exchange rates and what individual denominations of notes and coin look like, where money or traveller's cheques can be exchanged and access to ATMs or other withdrawal facilities. Major banks offer advice on dealing with foreign currencies and managing money while on overseas travel.

It is essential that you consult the organisation's travel policy and ensure payment for various items complies with the policy. Some organisations place a limit on how much can be spent or on how much they will reimburse expenditure. Travellers can then choose to spend over that amount if they wish, knowing that they will have to make up the difference out of their own funds.

Payment methods to consider

- Presenting a voucher at a hotel showing that the accommodation was prepaid through a travel agent
- Charge costs for hotels, meals, taxis, rental cars and plane tickets to a corporate credit card (such as AMEX, MasterCard etc.) or a Cabcharge card
- Pay in advance with corporate funds and present a receipt or fully-paid ticket at check-in
- Pay with a personal credit card and be reimbursed for costs later
- Pay on the spot with cash, get a receipt and be reimbursed later, or present the receipt as an indication of how corporate funds were spent

Time zone differences

Time zone differences can affect the timing of flights, which could result in an additional overnight stay in a hotel. Travelling across time zones also means that the traveller can arrive at their destination tired and jetlagged. In such situations, it may be unwise to book meetings for them to attend immediately. Instead, they may choose to travel the day before or on a weekend, giving them time to be fully prepared for the meetings and events they are travelling for.



Time zone differences can also mean that days are gained or lost crossing the International Date Line. Check flight times and dates carefully so meetings aren't made on a day when your traveller is still in the air.

Traveller preferences

While a detailed itinerary may be useful, especially for first-time travellers, the format and level of detail in the itinerary will be determined by the traveller and their preferences. Some experienced travellers may not need information about the location of a hotel if they stay there frequently, or require instructions on catching a taxi to the airport if they do this every time they go away. Others will be happy to have information such as flight details and hotel bookings on hand, and to work the rest out as they go.

If you know the needs and preferences of the person that you are organising travel for, it will assist you to plan efficiently and make arrangements that will suit and satisfy the traveller. Make sure any preferences your traveller has – no matter how trivial they may seem – are noted and acted on wherever possible. Prepare a travel file with a record of information about the traveller and their preferences and requirements.

Here are categories of information that you could ask them about.

Documentation and memberships

- Do they have a valid passport? If so, what is the passport number?
- Do they require visas? Do they already have a visa for the destination? Is it the right type of visa (business versus leisure)? What are the visa details?
- Do they have frequent flyer membership or hotel loyalty memberships? Are they a member of any airline lounges? Are they a loyal and therefore valued client with airlines, hotels or car rental agencies? If so, does this give them any benefits (such as a faster check-in, additional baggage allowance, or a room upgrade)?

Experience

- Do they travel often? Frequent travellers may require less information on some aspects of their trip.
- Have they visited their destination previously?
- Are they highly organised and a confident traveller, or do they need you to cover every possible scenario?

Preferences and requirements

- Do they have any specific dietary, medical, cultural or religious requirements?
- What mode of travel do they prefer; for example, rail, road, air?
- Do they have any travel phobias (e.g. fear of flying) or issues they would like to ensure are avoided (e.g. previous check-in problems with a particular airline)?
- Do they have a preference for a particular airline, hotel chain, hire-car company or taxi service? This may be dictated by the corporate policy, the traveller's loyalty and club memberships.
- What seating preference do they have; for example, on the aisle, a window, an exit row, towards the front of the plane? Always check with the airline whether preferred features are available on the specific flight you are booking.
- Do they have preferred departure and arrival times (for example, no late-night flights, avoid immediate connections at a particular airport)?

Leisure activities

The traveller may have free time at some stage during their trip. It can be helpful to include a list of leisure activities in the area. This could include current theatre productions, cinemas, shopping centre locations, sightseeing tours and points of interest. Websites like TripAdvisor or Expedia offer information and reviews on sights and activities all around the world, or you can ask your travel agent or a local tourist bureau. Many hotels provide brochures and booklets on local attractions that your traveller can source on arrival, or they can ask hotel staff if they have any suggestions for a spare weekend or evening.

Your traveller may want to take business colleagues out to dinner or lunch, or to a special event such as a theatre show. If they don't already know exactly what to do, you could always do some research on suitable restaurants or local theatre productions in your area.



If you need to make a reservation for a theatre production, organise it before the traveller leaves Australia and include the tickets, or details of the collection point, with their other travel documents. You can organise the tickets by contacting the theatre or a booking agent, or often the hotel where they are staying can organise a special package deal that includes the cost of the tickets.

Also find out whether the traveller's business associates have arranged any social activities and include these on the itinerary.

Example: travel itinerary

Here is an example of a travel itinerary.

FLIGHT CENTRE GROUPS SHOP 9/431 St KILDA ROAD * MELBOURNE * VIC 3004 PHONE: (03) 9865 4240 FAX: (03) 9865 4250	
Date: 02 MAR 2016	ACME GROUP LVL 35/160 COLLINS ST
Reference: QKVL3Y / 5WLR8AG	MELBOURNE VIC 3000
Travel Itinerary For: <p style="text-align: center;">MS ROSANNA PRESTON</p> Frequent flyer numbers have been advised - QF 0061784	
WEDNESDAY QANTAS AIRWAYS FLIGHT QF 115. CONFIRMED 08 MAR 09 - DEPART - BRISBANE/BRISBANE INTL 0900 NON-STOP Terminal: TERMINAL INTERNATIONAL 08 MAR 09 - ARRIVE - AUCKLAND/AUCKLAND INTL 1510 03HRS Terminal: TERMINAL INTERNATIONAL - AIRCRAFT - BOEING 767-300/300ER - CLASS - ECONOMY	
WEDNESDAY HOTEL 1 ROOM CONFIRMED 08 MAR 09 SKY CITY HOTEL CNR FEDERAL AND VICTORIA ST AUCKLAND - CONF NO - 490600 QANTAS HOLIDAYS	
FRIDAY QANTAS AIRWAYS FLIGHT QF 116. CONFIRMED 10 MAR 09 - DEPART - AUCKLAND/AUCKLAND INTL 0720 NON-STOP Terminal: TERMINAL INTERNATIONAL 10 MAR 09 - ARRIVE - BRISBANE/BRISBANE INTL 0745 03HRS Terminal: TERMINAL INTERNATIONAL - AIRCRAFT - BOEING 767-300/300ER - CLASS - ECONOMY - SEAT(S) 25D	

Practice task 3

To answer the following questions, refer to the travel itinerary in the previous example.

1. Do you think the level of information in the previous example of a travel itinerary would be enough for most travellers? Why or why not?

2. What other information could be included and why do you think it would be useful?

3. List personal preferences that could be recorded and accommodated where possible when preparing daily itineraries.

4. Comment on the formatting of the example itinerary. How could it be formatted to make it easier to read?

1D

Organise material for meetings

One of the most common reasons for domestic and international travel is for staff to meet face-to-face with colleagues, clients and others. As with meetings you would organise in the office, or at a local location, it is important that you are organised and well prepared.

Indeed, it is even more important to be ready for meetings that are being held off-site, as there could be little or no support network for your traveller if problems arise.

A range of materials may need to be organised, including equipment, legal documents and promotional materials. The travel itinerary that you have prepared could also be necessary, in part or full, for people at the business traveller's destination to plan their side of the trip. To ensure that all document and materials have been organised in time, it is a good idea to create a planning sheet with tasks and their deadlines to work to.

Organised documents

Here are several examples of the types of documents that you will come across when organising materials for a workplace meeting.

Promotional brochures, catalogues and product samples

Consider any issues relating to language and culture and prepare copies of brochures or catalogues in the local language if necessary. If a lot of copies are needed, perhaps send the correct amount by air, sea or road freight so the traveller doesn't have to transport them.

Provide more than you think they will need, just in case they run out or some are damaged. Have a backup plan for items that could be lost in transit. For example, pre-send the items to the hotel for delivery before your traveller arrives – then you can call ahead to see if the items have been delivered and, if not, arrange for an urgent delivery of additional materials.

Always provide some copies of brochures for the traveller and product samples (provided they are not too large or heavy, and are allowed on board an aircraft if necessary).

Work completed for the client

Your traveller may be visiting a client to deliver something your organisation has completed for them, such as architectural plans, an environmental survey, a recommendations paper, research report, product samples, prototypes or drawings. You need to make sure the items for the client are in order. This could mean:

- the traveller taking items with them (including in an aircraft or in the car).
- pre-posting some items (or having them freighted) to ensure they reach the destination on time
- doing both of the above as a precaution
- providing electronic copies of documents so a new set of documents can be created if necessary.

Business proposals

Business proposals should be provided in hard and soft copy. If the traveller needs multiple copies, consider sending them ahead so they don't have to carry them. Also consider security and ensure both the documents and boxes are in are labelled 'confidential', and evidence of any tampering can be easily seen.

Tenders

Presentation of tenders usually involves completing a lengthy document and may involve a formal presentation, meeting or joint review of other documents such as architectural plans or project plans. Be prepared for any eventualities, ensure the traveller has all the necessary documents on hand and make sure they are ready to overcome any language issues.

Contracts

The content of contracts could be affected by the country in which the traveller is doing business. Have an expert in Australian contract law, as well as the laws of the country your traveller is visiting, review any legal documents.

Meeting papers

Documents such as notices, agendas and minutes may be needed. At the very least, an agenda should be decided on prior to any meeting and minutes distributed afterwards. If your traveller is not able to take minutes, think of an alternative, such as asking the host organisation to provide someone who could do this, or having the traveller's assistant or a colleague 'listen in' on the meeting via teleconference.

Electronic presentations

Make sure each slide is not crammed with too much information and that slides are only used where they will add value to what is being verbally presented. Ensure that they are clear and easy to read for the people attending the meeting; consider whether any language or cultural issues will prevent this, and plan ahead. Ensure the type of presentation the traveller is displaying is compatible with the system the organisation is using. If the traveller is taking their own equipment overseas, remember to provide an adaptor so it can be plugged in.

Equipment

In organising business travel, you also need to find out whether office supplies, IT equipment or other equipment needs to be made available during the travel. Here are two examples of the type of equipment that may be required when organising business travel.

Information technology

Electronic equipment must be compatible with that used at the destination, so check this. In some locations, the traveller will need an adaptor so IT equipment works and items can be charged. Audio or video formats they use must work in the destination country. The traveller needs correct access details to access their email account and the internet remotely.

Office supplies

Find out from your traveller whether they prefer any particular type of equipment, and whether they are likely to need their own items. Attendance at a trade fair may require a box of essential items your traveller needs to set up their display or stand.

Telecommunications equipment

Make sure your traveller's mobile phone is set up for global roaming, meaning their number in Australia is accessible internationally (contact your telecommunications provider or visit their website to organise this). If your traveller's journey is domestic, investigate whether Australia's mobile phone network will give them coverage in the places they are going. Telecommunications providers are able to offer support information about mobile phone coverage.

If the traveller is relying on teleconferencing or videoconferencing equipment while they are away, find out what sort of equipment it is and ensure your traveller understands how it works, and has contact details for helpdesks that can help them with problems.



Example: solve language barriers

Annalisa is travelling to Osaka, Japan, to meet with a potential new distributor on behalf of her employer. She has prepared a PowerPoint presentation for the meeting that highlights all the company's products and the success they have had in other countries.

The week of her departure, she emails to check the number of attendees so she can ensure she has enough information packs to hand out at the meeting. The reply notes that only half of the eight meeting attendees speak and read English.

Annalisa panics for a moment. She then thinks about the situation and calls a translation company that is able to transcribe her presentation and information on the company and its products into Japanese. She takes a number of hard copies of both English and Japanese information kits with her to Japan, as well as the bilingual presentation.

Through the translation company she finds a reliable interpreter, based in Osaka, who is able to attend the meeting with her. This proves to be very useful and helps Annalisa enormously in her presentation, as she is confident her message is being understood. It also shows the Japanese company that her organisation is making a real effort to work with them.



Practice task 4

Identify documents and support material that may need to be organised within designated time lines for business travel.

1E

Prepare an itinerary to meet travel WHS requirements

WHS legislation obliges business owners to provide a safe place of work, WHS information, safe machinery and materials, safe systems of work and a suitable working environment and facilities, whether they are in their normal place of employment or travelling. Research the conditions that the employee may experience when undertaking business travel and inform them of precautions to take. Workers also have a responsibility to take reasonable care of their own health and safety.

Creating a business travel plan with contact and insurance details protects the health of staff. In some countries, business travellers have to be especially vigilant in relation to personal security. Well-organised travel leaves the traveller less vulnerable to assault or robbery.

Organise travel to avoid fatigue

Many travel timing issues have a WHS impact. If, for example, appointments are booked close together in order to maximise the benefits of a short trip, stress is experienced by the business traveller. Rushing to the next appointment invites injury. If the person organising the travel finds out travelling distances and times prior to booking and checks with the traveller to see if they are happy with allowed time between appointments, the risk of harm is reduced. Also ensure that there is time to set up any equipment or transport items in a safe manner.



Other issues to consider include total amount of travel per day, weight of equipment and baggage, rest periods and meal breaks, and local factors that could impact on health, such as temperatures.

Checklists for developing itineraries

Organising business travel can be a time-consuming and detailed process. For every business trip there are a multitude of details to collect, information to compare and bookings to confirm. Be organised and use some simple business tools to help you manage this process effectively.

Checklists help you remember all necessary arrangements. An itinerary checklist can include travel and accommodation reservations, passport and visa checks, travel and medical insurance, medical requirements, communication arrangements and support documents. You could include all details on one checklist or divide the items into separate components or checklists; for example, travel, business and financial. Keep your checklists in your travel folder.

If you use a checklist from the beginning, at any time it is simple to identify the arrangements in place and those still needing to be organised. Having a prepared checklist is a good way of noting initial travel details. It will cut down on the amount of time you spend discussing the trip with the prospective traveller and preparing instructions.

Your organisation may have a standard checklist for you to use. If not, you will need to develop your own.

Examples of items that an itinerary checklist can include:

- travel and accommodation reservations
- company policy requirements
- passport and visa checks
- travel and medical insurance
- medical requirements
- communication arrangements
- support documents
- meeting equipment needed.

Itinerary development

Information in checklists helps you prepare your draft itinerary. You won't be able to finalise the itinerary until all the tentative travel arrangements and meetings have been confirmed. However, you should be able to produce a good working draft once all the initial arrangements have been put in place. Give it to the traveller for review. Check whether additional requirements need to be included.

The traveller may need to have the itinerary approved by a senior manager before they can travel, so allow time for this step. The senior manager could suggest additional appointments or make other alterations.

Once the draft itinerary has been presented to the traveller (and if necessary, others) for approval, it can be confirmed. This may involve notifying airlines, travel agents, hotels or car hire companies that bookings can go ahead, and at this stage prepayment, partial payment or notification of billing details can be arranged.

Here are steps to take once the itinerary is finalised.

Make copies of itinerary

Make copies of itinerary:

- for the traveller
- the traveller's family
- the traveller's senior manager
- for the corporate files
- for yourself (or your copy can become the file copy).

Email or fax the itinerary to other people, including contacts in regional or international offices if requested.

Hand over itinerary

Place the traveller's copy of the itinerary in a folder with all the relevant documents required for the trip, and go through your checklist with the traveller before handing everything over to them. Do not leave this until the last minute.

Travel information

The Smartraveller website is managed by the Department of Foreign Affairs and Trade and contains important travel advice for various destinations around the world. It also contains contact information for various embassies, missions and consulates overseas, and instructions on what Australians should do if they encounter problems or difficulties overseas.

The site also provides excellent travel tips and bulletins covering issues Australians should be aware of, from natural disasters such as hurricanes and erupting volcanoes, to details on civil unrest, diseases, airport security levels and religious festivals. There are lists of countries to which the government advises Australians not to travel and others that they suggest Australians should reconsider.

You can subscribe to an update service that emails you when advice is updated. This could be useful and important information to have, especially if travel warnings are issued suddenly. If the traveller is registered with Smartraveller, they can be contacted by the Australian Government in the event of an emergency. Your traveller should have the opportunity to choose whether to take any personal risks travelling to different destinations.

The Smartraveller website can be found at www.smartraveller.gov.au.

Example: itinerary excerpt 1

The following examples are excerpts only. Complete checklists and itineraries will often run to several pages, depending on the length of the trip, the location and purpose. A full itinerary may show details such as times, addresses and means of transport to and from conferences, appointments, necessary names and contact details, bookings and transport details relating to departure.

Sample itinerary			
Name of traveller:			
Purpose of trip:			Date:
Item	Particulars	Status	Completed
Purpose of trip	Visit to company's manufacturing sites, attend a conference	Still under discussion	
Proposed dates of departure and return			
Names of clients or persons to be visited			
Names of contact (for organising meetings)			
Preferred meeting times	Morning, afternoon		
Meeting documentation and materials required	Meeting agenda, promotional hand-out material, overhead transparencies		

Example: itinerary excerpt 2

Sample itinerary		
Itinerary for Martha Jessup RRR Conference – Atlanta, Georgia 9–14 July 2016		
Time/Date	Details	Contact details
Wednesday 7 July 2016		
9.30 am	Astra taxi to pick up from home and drive to airport	Ph: (03) 9833 6700
11.00 am	QF11 departs Melbourne for Los Angeles via Auckland	
4.15 pm	QF 11 arrives Auckland	
5.30 pm	QF 11 departs Auckland	
10.20 am (local time)	QF11 arrives Los Angeles Total travel time to Los Angeles is 16 hours 20 minutes Hilton Hotel shuttle bus to hotel Accommodation: Hilton Los Angeles (Airport & Tower) 5711 West Century Boulevard Los Angeles California 90045-5672	Ph: 0011-1-310-410 4000 Fax: 0015-1-310-410 6250

Practice task 5

1. Explain why copies of the itinerary should be provided for the following:

- The traveller's family
- The traveller's senior manager
- Corporate files

Contacts in regional or international offices if requested

2. How do WHS considerations impact the way a traveller's itinerary is scheduled?

1F

Provide travel and meeting documents on time

Organising documents and materials for business trips is fundamental to the success of a business trip.

It is important the traveller departs with all the documents and other items they need with them, that they get to their destination and find that items they need have arrived safely, and that they can contact the office and quickly get replacement or additional items sent to them if the original documents or items don't arrive, are damaged or run out.

Depending on the quantity of documents required, it might be easiest for your traveller to just take along hard copies with an accompanying soft copy. Here are examples of both soft and hard copy formats available.

Hard copy

If travellers are visiting a number of destinations on their trip or need large documents or items, they may need to have items pre-sent.

If you anticipate problems, plan ahead. Find out how quickly additional copies of documents can be sent and by what means; for example, express post, courier, international freight.

Soft copy

Ensure your traveller has a soft copy of the documents they need. These could be saved to a cloud computing service so they can be accessed from anywhere with internet connection and also accessed on a smartphone as well as local computers. If backed up on a USB or portable hard drive, files can be accessed without internet access. Save files in a common file format such as .doc/.docx or as a PDF. Rich Text Format (.rtf) avoids compatibility problems in locations likely to have with older versions of the software.

Example: manage the delivery of bulky information materials

Amrita is a sales representative. She regularly visits regional towns to promote her organisation's country services. She provides stores in these areas with posters, product samples and other merchandising items for use in-store. Depending on who she is visiting, Amrita pre-posts these large items to the store ahead of her visit and then sets up the display when she gets there. Before doing this, she always checks whether this is okay with the store owner.

'It's much easier doing it this way – otherwise my car is loaded up with cardboard cut-outs, posters and other stuff that just ends up getting damaged. This way I can take a few items with me and rely on Australia Post to get the rest of it there before I arrive.'



Practice task 6

Explain what you would do to ensure itinerary and meeting documents are provided to a traveller within designated time lines.



Summary

1. All business travel should be well planned. A well-organised itinerary covering all aspects of the trip is likely to result in a successful and stress-free trip for the traveller.
2. Organising business travel means striking a balance between what the traveller wants, and what is available and affordable.
3. Organising a business travel itinerary can be a complicated process. There are many details of business travel that must be confirmed and arranged prior to the trip taking place.
4. A travel itinerary must be prepared that summarises the plan of the trip in chronological order.
5. A business travel itinerary should include: contact details of the people travelling and the people being visited; ticket collection times and locations; arrival and departure times, modes and locations; connection and transfer arrangements; transport arrangements on departure and arrival; appointment times/daily schedule; accommodation arrangements; meal times and locations; and suggested leisure activities.
6. When developing the itinerary, consider the traveller's preferred mode and class of travel and accommodation, as well as any time zone differences and WHS issues.
7. Using checklists is an effective means of ensuring all business travel and itinerary details have been organised.
8. Much business travel requires organising documents and materials for business meetings, such as the travel itinerary, overhead transparencies, electronic presentations, promotional brochures, work completed for the client and contracts for the client.
9. Documents and materials required by travellers must be dispatched to them within designated time lines.

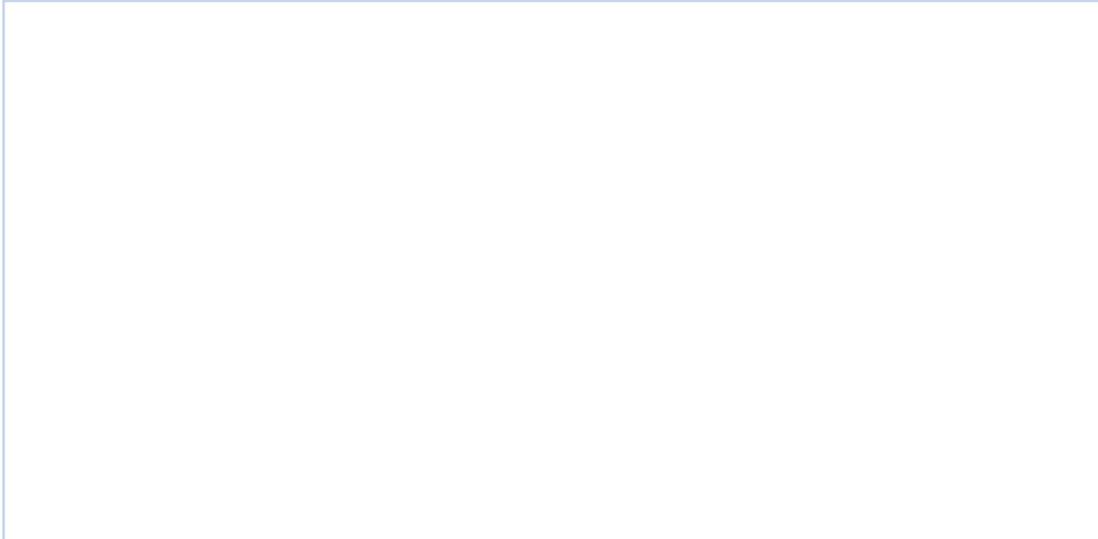
Learning checkpoint 1 Organise travel itineraries

This learning checkpoint allows you to review your skills and knowledge in organising travel itineraries

Part A

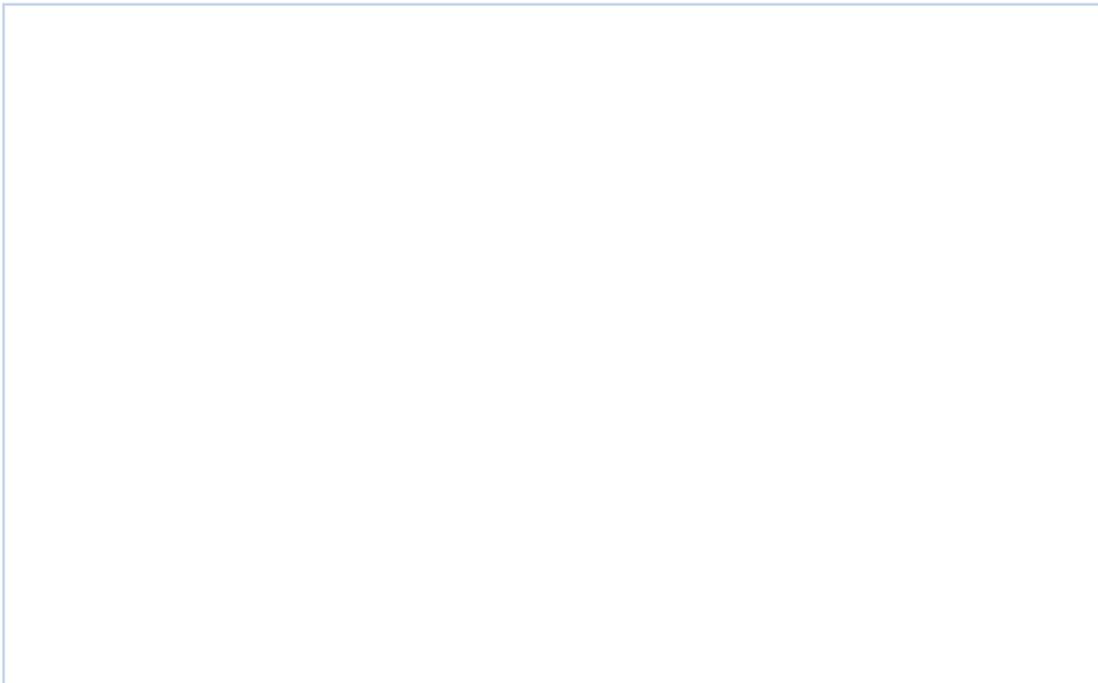
1. Explain why it is important to clarify each of the following details when organising business travel and how you would go about this:
 - a) The purpose of the trip
 - b) Who will be travelling
 - c) Travel budget
 - d) The people or organisations to be visited and their contact details
 - e) Organisational requirements
 - f) Meeting locations and times
 - g) Accommodation requirements

2. List the details that must be included in a business travel itinerary. Comment on the layout and style of the writing.



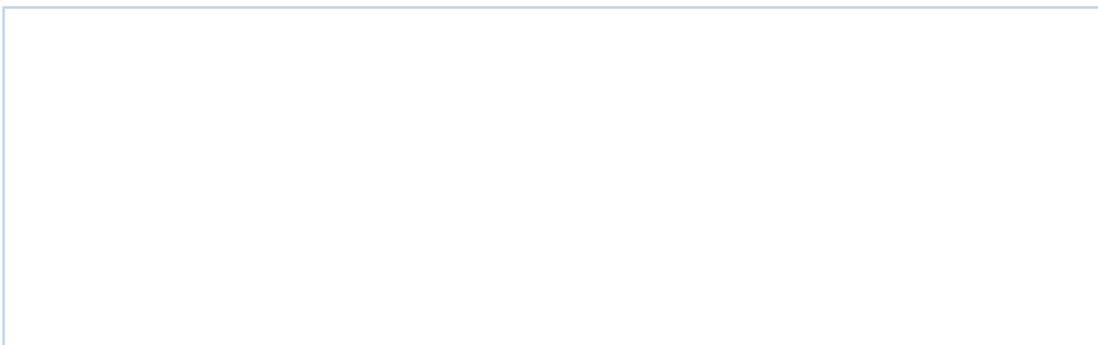
3. Discuss how the following travel demands affect the development of a business itinerary:

- Preferred mode and class of travel
- Time zone differences
- Availability of accommodation
- Style and class of accommodation
- Expenses and financial arrangements
- Traveller preferences
- WHS requirements.





4. List the documents and materials that may need to be organised and dispatched to travellers prior to business travel.



Part B

Read the scenario, then complete the tasks that follow.

Scenario

You are the office manager at a large construction engineering firm. You have been asked to organise the travel details, including preparing a detailed itinerary for Ian King, Managing Director, who is planning an overseas trip. He has given you the following information.

Going to:

Las Vegas for Construction Management Conference for three nights: October 20–23. Conference is on at the Mandalay Bay Hotel – please book me a room there. Advise of good golf course location in area. Book flight for arrival early 19 October or evening of 18.

New York to meet with Dudley & Dudley (Level 1, 1110 Avenue of the Americas) at 11 am, 25 October ph: 0011 1 212 587 3030. Book a room at the New York Hilton.

Leave three leisure days from 26–28 October so I can visit my daughter in Massachusetts. Please arrange car hire for me. I will pick car up and drop car at airport on my return.

Organise flight to London on evening of 28 October. Which airport in New York is departure? Attending trade fair in Birmingham on 30 October and 1 November. Where can I fly into? Will I need to get a train to Birmingham? What hotel would be good to stay at? Advise all details. Would prefer not to drive there from London.

Flight to Sydney. Please arrange for departure on 2 November. Will catch taxi home.

Other details:

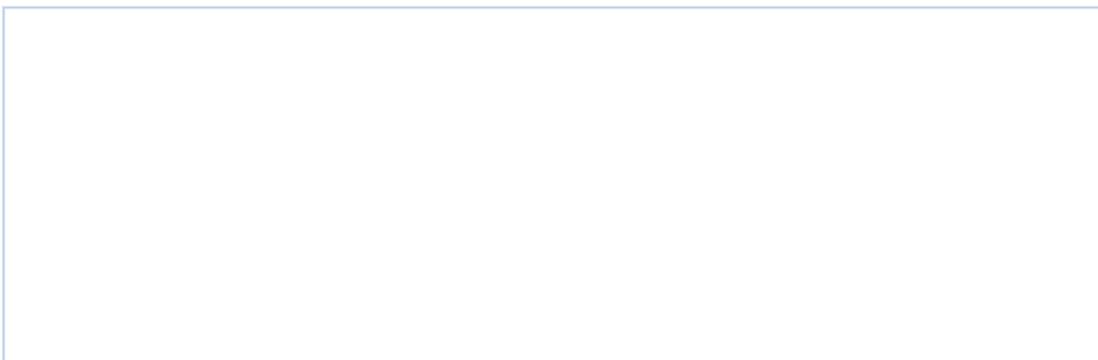
- Business-class travel only – make sure I get a proper bed on all flights.
- I need gluten free meals on all flights.
- Preferred airline is Qantas (please only book on oneworld); car rental is Hertz; only five-star hotels.
- Advise all address and contact details of hotels.
- Where are airport lounges located at all of the major airports I'm going through?
- My passport will expire six months after I arrive. Do I need to get a new one before I go?

1. Create an itinerary for Ian King after conducting some research. Assume that he needs to travel from Sydney to Los Angeles in time to get to the conference in Las Vegas comfortably. Use a table format to present your itinerary, with columns for date and time, for details and for contacts.





2. How would you ensure that the people who you are speaking to when you are arranging travel can understand you clearly when you are speaking on the phone? What listening strategies may you need to employ?



Topic 2

Make travel arrangements

Once the traveller's business schedule has been determined and you have prepared your draft itinerary, you need to make the necessary travel arrangements in accordance with your organisation's policies and procedures. If there are no formal policies and procedures in place, be guided by the past experiences of others and any generally recognised guidelines. Depending on the nature of the travel, a variety of government legislation will have bearing on the travel. Laws and regulations governing immigration, customs, WHS and taxation apply to international travel.

It is best to organise travel plans and make arrangements as far ahead as possible. Realising just a week before your traveller is about to leave that they need a visa or an updated passport will result in a lot of rushing about and possibly postponing the trip. As you organise an itinerary and make and confirm travel arrangements, ensure that the more time-consuming and critical aspects of organising the trip are attended to as early as possible.

In this topic you will learn how to:

- 2A Make bookings and reservations
- 2B Arrange travel documents
- 2C Confirm travel arrangements
- 2D Negotiate alternative arrangements
- 2E Record travel details
- 2F Make communication arrangements

2A

Make bookings and reservations

Booking and arrangements must all be made in accordance with organisational policies and procedures. These might all be covered by one broad travel policy, or be covered by separate policies, such as the organisation's car hire policy or expense management policy.

Examine your organisation's policy and procedures documents to locate relevant guidance on aspects of travel you are organising.

Here are examples of categories that are commonly covered by travel policies and procedures.

Organisational policies may cover the following:

- Authorisation processes
- Expenses: allowances, level of reimbursement for travel expenditure, etc.
- Guidelines: documentation to be completed by traveller and classes of accommodation to be used for different categories of staff and kinds of trips

Methods of making travel arrangements

There are alternative methods for making travel arrangements, and you need to know which method is the most effective for your situation and find out which method your organisation prefers to use.

When making travel arrangements for another person, you are privy to their personal details. You have a legal and ethical responsibility to respect the traveller's privacy and not discuss or divulge to others personal information entrusted to you. You may also be responsible for handling company credit card details or confidential information, which you must keep secure.

Methods for booking business travel include:

- travel agents
- reservation centres or travel and accommodation providers (either online or via telephone)
- reservation centres of intermediaries (either online or via telephone)
- corporate or business travel management organisations.

Travel agents

Travel agents specialise in organising and booking all aspects of domestic and international travel. Some travel agents specialise in organising trips to different areas (such as tours through Asia, bus trips in outback Australia) or different types of travel (such as cruises, conferences, corporate travel). Others are more general in their nature and book all sorts of trips.

Travel agents can make valuable and practical suggestions based on first-hand knowledge of a destination or the information they receive from airlines, tour companies, car rental firms and accommodation providers.

Here are some of the advantages of using a travel agent.

Advantages of using a travel agent

With one telephone call and your business trip itinerary, a travel agent can perform a major part of the business trip planning on your behalf, saving you time.

Their knowledge of is up to date and extensive, and they are able to source information from providers quickly.

Travel agents receive daily news and updates concerning fares, tariffs, conditions and special offers, and can usually organise the best deals.

Dealing with travel agents

Travel agents have relationships with providers such as airlines or hotels, and can provide their customers with good deals. Be aware, though, that many travel agents are rewarded for their loyalty to a particular airline or travel service provider. Make sure that the suggestion they are making is the best one for you.

If you decide to use a travel agent, you should provide them with the traveller's personal details (as recorded in their travel file) as well as any relevant details in relation to the business schedule. The more your travel agent understands about the corporate travel policies and needs of your organisation, the traveller, their preferences and the purpose of their trip, the better their ability to select travel products that are ideally suited to your organisation's policies and budget. After assisting you to choose the best options, the agent can make reservations for you.



Conduct research using travel agency websites to see which organisation is able to provide you with the type of service you require, and to locate agencies servicing your local geographic area. Most travel agencies have online and over-the-phone reservation services as well as personal service.

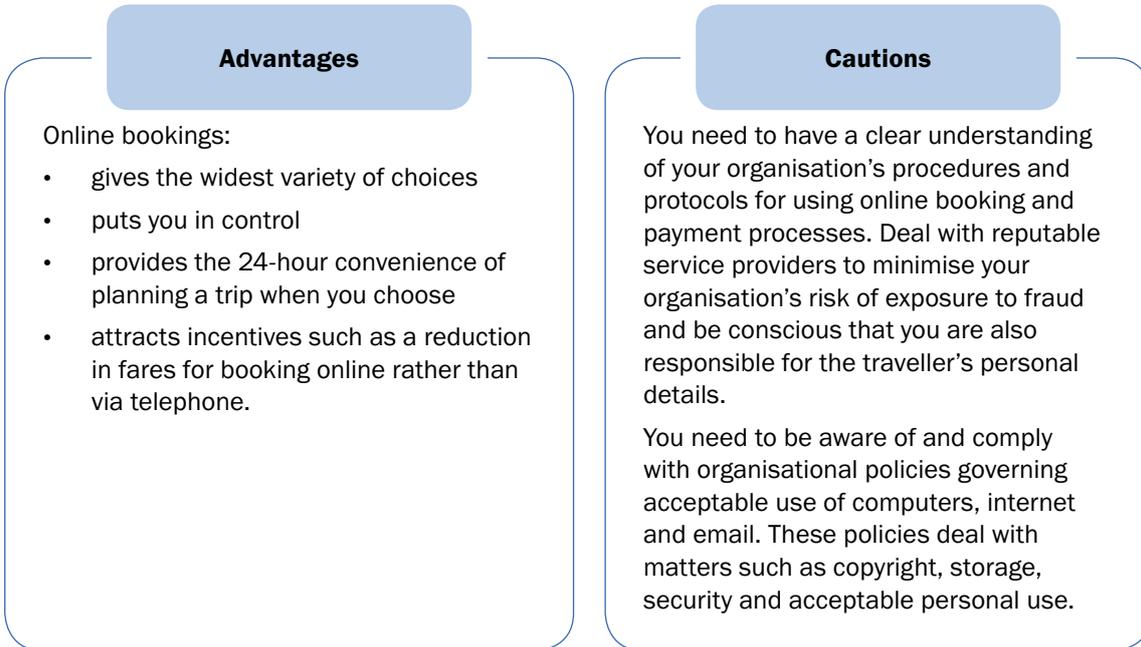
Internet and telephone reservation services

With an outline of the basic itinerary, you can conduct your own research regarding flights, possible accommodation, train schedules, car hire options, and so on. Websites such as Webjet, Expedia, Wotif and Booking.com allow you to compare fares and rates independently.

Bookings can be made online or by telephone. By phoning you can speak to people who know the products they are offering in great detail, request further information and ask them in-depth questions.

Airlines' and accommodation chains' websites usually offer facilities for either making reservations totally online, or by downloading a reservation form, completing the details and sending it back to them. Payment can be arranged online.

Online booking allows you to investigate travel options before making a decision, and prices according to flexibility in travel dates. Online booking has some advantages compared with using travel agents. Here are examples of these advantages and some cautions.



Independent research

If you are going to research, book and pay for transport and accommodation without the assistance of a travel agent, locate and bookmark/favourite or record in another way, the websites of businesses that are likely to be able to provide products and services that meet the requirements of your organisation's travel policy. Also familiarise yourself with the websites of some of the major alliances that airlines have formed, as they offer consolidated information on airlines' schedules and airports, and offer frequent travellers a range of benefits. Joining one member airline's frequent flyer scheme, for example, will enable your traveller to use points on all member airlines. Examples are Oneworld and SkyTeam.

Here are examples of businesses and categories that could be suitable for you to start with.

Research categories	
<p>Accommodation providers</p> <ul style="list-style-type: none"> • Rydges • Marriot Hotels • Accor Hotels • Hotel associations such as the Australian Hotels Association can provide information 	<p>Airlines</p> <ul style="list-style-type: none"> • Air China • Jetstar • Virgin Australia
<p>Car rental</p> <ul style="list-style-type: none"> • Avis • Thrifty • Europcar 	<p>Train schedules and bookings</p> <ul style="list-style-type: none"> • Eurail • Amtrak • Rail Australia

Online services

Online travel providers allow you to compare prices, schedules and level of service offered by competing organisations, so you can choose the one that best suits the traveller's needs, the travel itinerary, the corporate travel policy and the budget for the trip.

Here are some examples of online providers.

Last-minute accommodation

- Look at these 'last-minute' sites if a trip is a routine one and being organised quickly
- Examples: wotif.com, hotel.com.au

Flights, car hire, hotels and package deals

- Some sites offer discounted rooms, flights and car hire if you need to use them within the next few days
- Examples include Webjet and Need It Now

Car hire

- Webcarhire
- Vroom Vroom Vroom

Rail travel

- Rail journeys
- Rail Plus

Using online resources

When using online resources you need to be aware of policies and procedures around researching and booking travel online. To ensure that you comply with policies and procedures governing privacy, make sure that you use reputable websites when conducting travel research or when making travel arrangements and bookings. Be very careful and take precautions, read the fine print and research the website provider to ensure that they are an illegitimate provider. This will minimise risk of exposure to possible fraudulent activity. If organising travel arrangements on behalf of a third party, ensure you remain responsible when handling their personal details.



Travel management organisations

Most business travellers have a set of specific needs. This has given rise to the establishment of a number of specialist travel organisations. Examples include Corporate Travel Management and HRG Worldwide.

Here are examples of the services that can be offered by specialist travel management services.

Services offered by specialist travel management services

In-depth knowledge that helps companies arrange business travel

Reporting and invoicing arrangements that enable organisations to track and manage their corporate travel spend effectively

Booking within the organisation's designated travel policy

Dedicated staff experienced in helping senior managers or VIPs with their travel requirements

Contact by telephone or email

On-site staff or staff who are externally located but able to focus on your organisation's needs (for larger companies only)

Example: use a corporate travel company

Simone is the assistant to a team of business development managers at a financial services company. They are based in Sydney, but travel extensively around Australia. She discusses the relationship they have with their corporate travel manager.

'We work with a corporate travel company based in Bondi. They are quite small yet specialise in corporate travel.

'I call or email them almost every day, as I am the one who coordinates travel arrangements for the whole team here. One or more of our team are away almost all the time, so there are a lot of travel bookings to be made. I also have to organise meetings and sometimes information sessions for them. I do it all with the help of Trina, our account manager at the travel company. She also does the actual bookings for us based on my instructions.

'Sometimes I will just say, "Mike has to go to Cairns for three nights starting next Tuesday", and she'll do the rest. She knows our travel policy and even the preferences of where to stay and so on for each traveller. Other times, I might email her through a list of meetings one of the team has set up and she'll arrange bookings around that, then send it back to us for approval before going ahead and confirming them.'



Practice task 7

1. List advantages and disadvantages of using a travel agency to organise and pay for business travel.

2. Research accommodation, airline, car rental and train schedules and bookings websites. Make notes on at least one in each category that you would consider using when arranging travel for an organisation and what is it about the organisation or website that would make them useful to a travel organiser. Ensure you comply with organisational policies governing use of websites and other online resources.

3. Select a destination and compare flights, accommodation or other travel prices when booked through an intermediary company, as opposed to booking directly with the provider. Search for information from the provider first. List what the provider offers that intermediaries don't and vice versa.

4. What key provisions of legislation may affect business travel?

2B

Arrange travel documents

It is essential to have travel documents organised in advance of the trip. Depending on the purpose, the destination and the traveller, some business trips require more documentation than others.

For example, a sales representative driving to see customers in regional centres would require little in the way of travel documents – perhaps just contact details for hotels that have been booked for them and their appointment schedule. On the other hand, a first-time international traveller going to a conference in Europe and then to meetings in the US will require a great deal of information: passports, perhaps a visa, insurance, train timetables, maps, vouchers, meeting times and places, and so on.



Passports and visas

Does your traveller need a visa? Is their passport about to expire? These questions need to be addressed well before the traveller is due to depart.

Visas

Many governments require an appropriate visa to be endorsed in the traveller's passport before entry into the country is permitted. Visas can only be obtained once the traveller has a valid passport.

You should ensure that the traveller has all the appropriate visas, including transit visas prior to their departure. Application forms can be sourced from the relevant embassy or consulate or their website. If you are using a travel agent, they may have forms on hand. Completed forms, along with the traveller's passport and a nominated fee, must be either posted or couriered to the appropriate embassy or consulate, or presented in person.

Your traveller may be going to a country that requires Australians to have a visa issued to them prior to them arriving in the country, so they can legally enter. If they don't have a visa (which is usually in the form of a stamp or sticker in your passport) they will be turned away at immigration in the country they are visiting. Visas can take time to obtain, cost money and are often issued for specific purposes (business, leisure, etc.) and time periods. Sometimes a permit is required in addition to a visa. There are often other requirements that travellers must satisfy before they are allowed entry – such as having a valid credit card, money and tickets that prove they are going to return home or continue on with the trip after their stay in that country is complete. This is true of almost all countries.

Getting a visa for entry to some countries, for example, Singapore, requires your traveller to have a passport that is valid for a period of time after the trip is being made. This is usually the case even when a visa is not required.

Passports

Renewing a passport takes time, so you should check requirements with the traveller and your travel agent as soon as you learn the details of the trip.

Passports and visas require updated photographs of the traveller (usually two for the passport and one for the visa); therefore, if necessary, you should arrange for the traveller to have passport photographs taken as soon as possible. Many Australia Post offices and pharmacies can arrange this on the spot.

You can obtain passport application forms from your local Australia Post office or the Australian Passport Office. Information on passport applications is available on the Passport Australia website (www.passports.gov.au) or telephone enquiries can be made by calling 13 12 32 (toll free) from anywhere in Australia.

Health precautions

Many countries require you to either have had certain vaccinations, or they have disease risks – so precautions should be taken to prevent illness. For example, for travel to most countries in South-East Asia it is suggested that anti-malaria medication is taken, and for many African countries you must be immunised against yellow fever.



Information about vaccination requirements can be obtained on the World Health Organization's website (www.who.int) or by contacting a local doctor (there are some that specialise in travel medicine).

Some vaccinations require follow-up shots, so you should ensure that the traveller makes an appointment with their doctor promptly, so all necessary injections can be given before departure. Early planning will ensure your traveller has enough time to have a passport reissued, get a visa and be immunised against any diseases they may be exposed to.

Once you know your traveller's basic travel plans, you can look up information on visa and health issues [here](#) and [here](#).

- Qantas: www.qantas.com.au/travel/airlines/visa-health/global/en
- Department of Foreign Affairs and Trade: www.dfat.gov.au/visas

Travel and medical insurance

Because the cost of medical treatment in many countries is very high, it is essential the traveller has adequate insurance cover when travelling overseas. You should check whether your organisation has a corporate policy that covers the traveller wherever they are going. If not, you should arrange insurance coverage for the duration of the trip. Generally, travel insurance policies cover both general travel and medical requirements.

Most corporate policies extend insurance cover to close relatives of the traveller who might be travelling with them, and will also cover the traveller when on part-business and part-private travel.

You should remind travellers to organise an adequate supply of prescription medication for when they are out of the country – required medicines may not be available at their destinations, or the prescriptions may not be valid. Also check that the traveller is permitted to take their medication out of Australia and into the countries they are visiting. Ask them to have their doctor write a letter listing the medications they are taking, so this can be presented to customs officials in the destination country if necessary. A spare pair of prescription eyewear or copy of the prescription in case of loss or breakage is recommended.

Depending on the degree of cover, travel insurance policies usually include:

- replacement airfares (in case of cancellations or any unforeseen problems)
- replacement of lost or stolen luggage and personal effects and lost or stolen travel documents
- personal liability (in case the traveller accidentally causes damage to property or injury to another person)
- return of expenses incurred if travel had to be cancelled or postponed due to illness or other unforeseen events
- legal expenses if incurred
- rental vehicle excess
- death or disability cover
- urgent medical and dental costs.

Timetables and maps

Timetables and maps are available online. Where the internet is available and internet access has been organised for the traveller, these documents can be accessed using a computer or smartphone.

Timetables

Timetables are important if part of the traveller's journey involves rail travel and they plan to buy a ticket when and where they need it, or if they have pre-purchased a ticket or rail pass and are flexible about which train they can take.

Most rail timetables are available on the internet. Your traveller may be content to simply have the website listed on the itinerary, or they might prefer to have a hard copy of the timetable printed for easy reference.

If your traveller has this sort of flexibility for an airline ticket, which is more unusual, then the same applies: provide them with a website address or hard-copy list of possible flight times.

Maps

Online maps provide maps of exact locations (both within Australia and worldwide) as well as driving directions. They also show places such as railway stations, shopping centres and places of interest.

- Google maps: www.google.com.au/maps
- Where-is: www.whereis.com.au
- Map-quest: www.mapquest.com

Maps are useful if your traveller needs to find a location on foot, by using public transport, or if driving themselves to an appointment in an unfamiliar location. Hard copy maps can be purchased from specialist suppliers and street directories are available for many destinations if necessary.

Car hire companies and hotels can provide guests with maps of the local area and directions to and from various locations. Local tourist bureaus and information counters at airports also have maps and information on public transport.

Accommodation guides

If a business traveller has a destination in mind but isn't sure where to stay, there are a number of options, but making bookings on arrival is risky. It can mean that the traveller has fewer options or could even find themselves without a hotel room.

When booking a room in advance, information on the accommodation and the services provided can be requested from the hotel or by printing out information from their website. Your traveller may like to know in advance that a buffet breakfast is included in their room rate and that they can use the hotel's gym and pool.

Finding out about accommodation might involve:

- asking your travel agent to advise you
- looking at an accommodation or tourism website specific to that destination
- requesting a copy of an accommodation guide from the destination's local tourist outlet
- asking your traveller to pick up a copy on arrival and make their booking at that time.

Other documents

When organising business travel, you need understand how travel vouchers are used and need to organise three additional documents prior to the traveller's departure: a business schedule, meeting agendas and a list of contacts. Here are examples of other types of documents you will need when organising business travel.

Travel vouchers

Travel vouchers are usually issued by travel agencies or when accommodation and flights are booked as a package and prepaid.

You will receive a document with booking information on it that your traveller has to present at check-in. It will contain their name and contact details and confirmation of prepayment. Photocopy these documents and keep a copy in the office. If the traveller loses their copy they can call you and have another faxed through to them.

Meeting agendas and business schedule

Provide your traveller with enough hard copies of meeting agendas and other documents, as well as a soft copy. Send them in advance if the volume of documentation is too big to transport.

Also ensure the traveller has a copy of their business schedule, detailing appointment times and locations, as well as the subject matter of the engagement and the people they will be meeting.

Lists of contacts and other information

As a precautionary measure it is recommended that contact details and other information is kept on file or provided to the business traveller. Here is more information about copies and contact details.

Copies

If your traveller is going overseas, always take a photocopy of the front page of the passport (or passports if they have dual citizenship) and a copy of the pages containing any relevant visa information for the journey. Include this with the travel documentation the traveller takes with them and keep a copy on file in the office.

Also copy their driver's licence and make a note of (or photocopy) identification numbers on any traveller's cheques, credit or travel money cards they are taking with them. Double-check you have included reference or booking numbers for airline, car rental and hotel bookings on the itinerary. Also keep a copy of all of this information for yourself, on file, so in the event of a problem the traveller can contact you for help.

Contact details

Include a list of emergency contact details (such as embassies in your traveller's destination, credit card numbers, medical and travel insurance claim numbers) on the itinerary or on a separate page. The traveller can then make contact if they experience problems or lose their documents.

Remember to include numbers that are accessible from overseas and not local 1800 numbers. These numbers will often start with 0011 61 + (Australia's international direct dial code), followed by the area code (minus the 0) and then the eight-digit number.

Also include other contact details for them, including the office phone number and after-hours numbers. Many travel agents offer clients 24-hour call centres in case they encounter difficulties; so ensure they are aware of these as well.

Practice task 8

1. List documents that are likely to be necessary to arrange overseas travel in accordance with an organisational traveller's itinerary and individual requirements.

2. What information should be researched before the trip?

2C

Confirm travel arrangements

It is important to confirm travel bookings before travel takes place. The amount of notice that you are given to arrange travel may vary, and sometimes you might have to work to tight time lines. To meet designated time lines, it is best to identify what arrangements you need to make as early as possible, leaving yourself time to check and confirm arrangements. Here are examples of problems that could occur. Make sure you identify them early and address each one according to this checklist.

Booking errors

Make sure the booking you made has been processed correctly, especially where flights, times, traveller preferences (a particular seat on a plane, room type, or model and make of car) and other variables have been requested.

Payment errors

If prepayment has been made, making sure that the payment has been processed fully prior to travel will avoid any problems at check-in or during the trip.

Other errors

Errors (human and electronic) can and do take place. Double-checking and confirming departure times, flight numbers, car bookings and so on is a prudent measure to take, as often once a trip has commenced, communication difficulties or trying to make late changes to bookings can be a difficult, costly and sometimes impossible process.

Visa and passport errors

Verify that visas are for the appropriate length of time, are the right type (e.g. for business rather than leisure) and have been issued properly. Make a final check that the traveller's passport is in order, and that any other needed documentation (such as letters from their doctor authorising them to carry medicines prescribed for them and vaccination certificates) have also been arranged.

The process of confirming travel details

Confirming travel details is usually a simple process and generally involves the following steps.

Confirmation of travel details

Review information provided in your travel documentation.

Check that the booking is what you wanted.

Check with the service provider (airline, car rental company and hotel) that bookings are correct, and check you have the paperwork or other confirmation that proves this.

Confirm travel arrangements

Proof of booking provides a record for the business traveller and their organisation and allows for subsequent legs of the trip to be organised. Often the booking numbers in themselves act as confirmations and the reference numbers that are issued are both proof that the booking has been made and also allow airlines, hotels and the like to quickly access passenger details using this code.

Here are five examples of methods that can be used to confirm bookings.

e-tickets

Bookings made online, either directly through the airline or through a third-party provider, are confirmed by printing out a document that acts as a tax invoice, receipt for payment, instructions for the traveller (such as car pick-up location and time, flight or room check-in time) and booking confirmation. If bookings are made on an airline, this is referred to as an e-ticket.

Paper tickets

For some flights on some airlines, a paper ticket is issued by the airline. Like an e-ticket, a paper ticket contains all the information a traveller needs to know about their flight, including the airline code, flight number, departure time, stop-off points and arrival destination.

Electronic or printed airline itinerary

In addition to or instead of an e-ticket, some travel agents may provide you with an electronic or printed airline itinerary. This is particularly the case with long-distance or multi-sector trips where the booking has been made through an airline's or the agency's booking system and an e-ticket is inappropriate due to the complexity of the trip. The itinerary should include the usual information (flight times, numbers, and departure and arrival information) as well as at least one booking code or reference number.

Accommodation confirmation email, facsimile or letter

Depending on the style of accommodation being booked and how the booking is made, you could receive confirmation in an email, fax or letter. This will include the booking details, name of the guest, payment confirmation (or price confirmation) and perhaps a reference number or booking code. Large hotel chains may issue a document similar to an e-ticket, or may send you a personalised but automatically generated email.

Travel agent itinerary

Travel agents usually provide their clients with a travel itinerary summarising all aspects of the trip booked on the client's behalf. This itinerary is often the first of many documents provided in some sort of folder, either hard copy or emailed. It serves as a useful reference point and usually links to more detailed information issued by service providers (such as vouchers, e-tickets, paper tickets, car booking confirmations and emails from hotels already booked).

Example: booking confirmation

Christi is a travel coordinator at a large corporate travel company. Her main client is a multinational accountancy firm. Her job is to make domestic bookings for the company's Australian employees. She explains the process they have in place to confirm bookings.

'Once we have received information from the client about where they need to travel to and what bookings should be made, we make the arrangements for them in accordance with their travel policy. All the bookings we make are done using reservation systems we have access to through our mainframe computer system.

'When a booking is made, a reference number or code relating to that specific booking is generated. For a typical sort of trip we might have a reference number generated by the airline that relates to the flight bookings, a number from the car rental agency and one from the hotel. The traveller is emailed a copy of their itinerary with all the details on it, including these numbers. As an attachment, we'll include any vouchers, emails or printouts from the internet or our computer system that have been issued by the travel service providers. It is up to the traveller to check these details, advise us of any changes as soon as possible or let us know that the bookings are okay.'



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Practice task 9

Your CEO has asked you to arrange an international business trip to the US and Canada. The itinerary requires connecting flights, multiple overnight stays and land travel in and between cities to attend meetings and conferences. The CEO will also visit relatives in the US while away.

1. What sort of documents and checklists will you require to ensure the trip is planned and runs smoothly?

2. What confirmation and checking process will you use?

3. Whose responsibility is it to check that all bookings are correct?

2D

Negotiate alternative arrangements

Some aspects of your travel arrangements may change. Business circumstances often alter: a meeting may have to be moved to another time or cancelled altogether, flights are sometimes rescheduled by airlines, and hotels occasionally double-book. Don't panic if this happens. Discuss the situation with the traveller and calmly commence making other arrangements.

Negotiating alternative travel arrangements

- Follow the steps again, making changes where necessary, cancelling some arrangements and making new ones where required.
- Tick off each step as you complete it.
- Prepare an updated itinerary once all changes have been made.

Rearrange travel

Fortunately, you should not often need to make short-notice changes to travel arrangements, but this can happen in a busy corporate environment. It is at such times that a good relationship with a travel agent can prove to be most beneficial, and your earlier travel planning, including detailed checklists and itinerary, will pay off.

Incorporating a certain amount of flexibility into the original itinerary, such as avoiding rigid discount fare structures, and allowing plenty of time between appointments, makes it easier to make changes after initial arrangements have been made.

Keep the relevant people informed of any changes, and be sure to organise new confirmation documents to replace, or attach to, the original documents.



Practice task 10

Read the case study, and then complete the task that follows.

Case study

Baade's organisation wants to buy a small manufacturing company on the outskirts of a city in another state and he has organised for the managing director to visit the manufacturing company next Friday. All travel arrangements are in place when the company learns that another organisation has the same idea. The managing director cannot afford to wait until Friday. He needs to go the next day.

Baade telephones the travel agent, advises them of the changes, ascertains what flights are available, discusses the options with the managing director and confirms the chosen flights with the agent. The hotel he has booked does not have rooms on the new dates, so he asks the reservations clerk to recommend an alternative hotel nearby that is of a suitable standard, and quickly contacts the hotel and makes a reservation. He then notifies the car hire firm that the dates of hire need to change and is able to organise another car to suit the new arrangements, although he has to accept a smaller vehicle.

Baade goes through his original travel checklist to see whether he needs to make any other changes to suit the new schedule. Once he checks everything off, he prepares a new itinerary and goes through it carefully with his managing director.

1. Why is it important for Baade to go through the new arrangements with the managing director?

2. When does Baade need to collaborate with others to achieve an agreeable outcome?

3. What document enables Baade to reorganise travel at short notice smoothly and within time constraints?

2E

Record travel details

Your organisation's travel policy may specify what details need to be recorded and easily accessible while a staff member is travelling. All authorised travel documents may need to be kept in a central location. Employees may be required to keep a diary for all travel where their stay exceeds five days, to comply with Fringe Benefit Tax requirements.



For future reference, records should be kept of all travel arrangements. Your organisation may have guidelines regarding recording travel information. If not, there are various ways for you to record the details of each trip.

The checklists you completed for the travel arrangements can be used as a record of the trip and placed in the appropriate file. Also place a copy of the traveller's itinerary on file. A well-prepared itinerary will contain many key aspects of the trip, such as times, dates, personnel involved and contact details, and will act as a valuable future reference.

There are several ways of recording travel details. The system preferred may depend on the amount of travel that various individuals undertake.

Keep a separate file for each business trip

A separate file for each trip could be electronic or hard copy (or both). Note all details as they are booked and summarise conversations with travel agents, the traveller and service providers. Emails or web-based information can be printed out or saved in a special folder on your computer or server. Here are examples of the advantages and disadvantages of keeping separate files for each business trip.

Advantages

- Every detail of the trip is recorded, including progress made as the trip is organised and the decisions made.
- The person organising the trip can quickly access information about bookings and traveller preferences, etc.

Disadvantages

- The system used will need to be understood and accessible by others (such as the traveller or other members of staff) for when the person who set the file up is away from the office.
- Keeping separate files for every trip taken can take up a lot of physical space (in a filing cabinet for example) or electronic space on the organisation's server.
- Critical travel documents, such as passports, tickets and itineraries can be scanned and stored electronically.

Keep an individual file for each aspect of the trip

An individual file for each aspect of a business trip involves breaking down the file for the trip into smaller sections. Each section could be further broken down by trip sectors (for example, attendance at a conference, sales meetings), destinations or elements of the trip (US bookings, Central American bookings and South-East Asian bookings) or service providers (airlines, car companies, accommodation providers).

Here are advantages and disadvantages for keeping travel files for specific parts of the business trip.

Advantages

This system is very useful for particularly long or complex business trips. The way the files are set up will be determined by the sort of trip.

Disadvantages

The system could be overly and unnecessarily complicated. Different aspects of the trip could become difficult to categorise.

Use a prepared checklist or a diary

Various aspects of the trip can be summarised in a checklist format using a template. If a template proves to be problematic, details can be summarised on a one-page document, like an abridged itinerary. The organisation may have its own standard checklist.

A checklist makes sure that all aspects of a trip are covered. It provides a simple and easy summary.

However, a standard checklist may not suit the type of trip organised. Different aspects of the trip may be difficult to summarise. New checklists may need to be created to cater for different types of trips and itineraries.

Another method is to retain the electronic diary record or hard-copy diary record that has been made during the time that the trip has been arranged. Dates can coincide with the traveller's journey so people in the office can see at a glance where the individual is and what they are doing that day. Here are the advantages and disadvantages of keeping a checklist or a diary.

Keeping a diary as a record

Advantages: A diary is quick and easy to maintain. If using an electronic diary, it can be shared with others using a meeting booking system or an office email.

Disadvantages: A diary could be difficult for others to access if a hard copy is being used. Details of the trip are spread through different pages of the diary.

Example: standard travel details kept on file

Here is an example of a traveller's form featuring standard travel items that a business keeps on file.

Checklist – travel details for Petra Milson: SE Asian buying trip March 2008	
Date of departure:	09/03/16
Flight details:	Singapore–Kuala Lumpur (Singapore Airlines) SQ234 dep. 2000 09/03/16 Kuala Lumpur–Bangkok (Malaysia Airlines) MH602 dep. 1350 13/03/15 Bangkok–Melbourne (Thai Airways) TG31 dep. 2130 16/03/16
Accommodation:	Kuala Lumpur: Shangri-La Hotel – 4 nights, deluxe room Bangkok: Marriott Hotel – 3 nights
Transport:	Taxi services to be arranged by Peta on arrival
Communication:	By mobile (global roaming set up) and email
Traveller finance:	Corporate AMEX card; air travel prepaid by agent
Passport and visas:	Expires 07 June 2017; no visa required for this trip

Practice task 11

Access the travel policy of your organisation or a travel policy that you locate online. What travel details does the organisation require to be kept?

2F

Make communication arrangements

It is important to ensure employees have the communication tools they need when they are out of the office. Organising overseas communication may be complicated and problematic and require care in its organisation.

Being contactable is an issue of personal safety: in some destinations, it is important that all travellers have access to a reliable telephone and that their families and employers know they are safe. This is particularly so in regions that are prone to strife and civil unrest, or if the traveller has the misfortune to be in the wrong place at the wrong time – for instance, in an area where a military coup unexpectedly happens, a natural disaster, strikes, or an accident or terrorist attack. At these times, travellers may need to make urgent arrangements to leave wherever they are. This means quickly contacting travel providers, their family and employer, and reaching Australian officials or others involved in managing the event to get information and instructions on what to do.

Travellers may need to contact others or be contacted by:

- colleagues, managers and others in the office
- families and friends
- clients
- others they have arranged meetings with while they are away
- travel service providers, including the travel agent
- travel insurance providers
- Australian embassy or consulate staff
- local police or hospitals and other similar groups, if necessary.

Points of contact

When arranging communication for a traveller, point of contact is one key element to consider, including mobile phone, email and fax access.

Once you have investigated and negotiated the most suitable form of communication for a leg of business trip, make sure all these communication details are clearly stated in the traveller's itinerary or perhaps even on a separate 'contact' sheet that provides a list of dates, the traveller's schedule and how they can be contacted.

Ensure you include all contact details including international dialling instructions and codes for telephone and fax lines. Also include the names of people you may need to contact who can facilitate communication with them.

There are a number of ways that travellers can be contactable, both within Australia and internationally.

Communication methods include:

- mobile phone calls and SMS messages
- regular 'land line' telephone points, such as hotels, client offices or regional offices
- faxes at similar locations
- email (accessible via the internet or using wireless or other technology set up by the organisation)
- a pager

- leaving messages for them ahead of their arrival at certain places (such as hotels or airline lounges)
- sending information by courier or post
- a prepaid phone card so the traveller can call the office or home using a country's local phone service, without paying.

Mobile phone access

Mobile phone access is easier to set up for domestic trips than international ones. If the travel is domestic and the traveller already has a business mobile phone, the only issue is whether they will get coverage in the areas they are visiting. You can check this by accessing information on the mobile providers' websites.



If the traveller is going overseas, you need to contact their mobile phone service provider and request global or international roaming. This involves additional charges and perhaps a prepayment.

Setting up this service should mean that in most locations calls can be made to or from the traveller's mobile. This will depend on the agreements the Australian service provider has with mobile networks in different international locations, so you need to ask them about this.

There is an alternative to global roaming. If the traveller has a mobile phone with dual SIM card, they will be contactable on their usual Australian phone number, as well as take advantage of a travel SIM card for cheaper calls overseas.

In most countries, international calling cards are available to purchase at retailers at airports, so your traveller could purchase one on arrival if necessary.

Email and fax access

Examine the feasibility of communicating by these methods when business travellers are away. Confidentiality is a factor to consider when using a fax machine.

Email

Email access can be difficult for staff in remote areas. Ask your IT helpdesk well in advance of the trip how your traveller can access their office email system while they are away. Ask them to organise a time to explain to the traveller how the system works. Get the traveller to practise using this system out of the office before they make their trip.

If you can't use the organisation's email system, because it is too difficult or costly to set up, then you can provide your traveller with a temporary email address (such as Gmail, Zoho or Outlook.com) accessible via any internet connection. This way they can send and receive documents if they need to from wherever they are in the world. You can also arrange to have all their mail diverted from their work email address to the temporary account.

Fax

Arranging fax access can be important if your traveller needs to receive hard copy documents (such as legal documents) for signature, review or information purposes. Find out fax numbers for your traveller's destinations and how these points deal with confidential information if you anticipate the need. In such situations, call ahead and ask if your traveller can take the fax off the machine themselves. Otherwise, ask the agent to place the document in an envelope immediately and mark it as confidential.

All pages should be labelled 'confidential' if necessary, and include the recipient's name and room number, and your contact details, including your name, telephone and fax numbers. Make sure each page also contains enough details so the fax can be delivered to your traveller.

Example: a contact sheet

Here is a basic contact sheet for a business traveller going to Denmark.

Contact sheet: Mal Davey – trip to Copenhagen 10 July 2016 – 14 July 2016	
Mobile:	0403 888 777 (set up for global roaming through Telstra)
Email:	Temporary email address for contact while away: mdavey@gmail.com
Hotel in Copenhagen:	Sofitel Copenhagen Plaza Bernstorffsgade 4 1577 COPENHAGEN DENMARK
Tel :	0011 45 33/149262
Fax :	0011 45 33/939362
Email :	sofitel@accorhotel.dk
Other contacts:	Mathias Spelman – sales manager, Copenhagen office. 0011 45 33/743298 or m.spelman@kiersted.dk

Practice task 12

1. Read the travel policy of your organisation or an organisation with which you are familiar. Are staff travelling on business required to keep records of the phone calls they make on behalf of the organisation?

2. Does the travel policy specify preferred methods of communication? If so, describe these methods.

Summary

1. Once the traveller's business itinerary and schedule has been determined, start making the necessary travel arrangements.
2. Travel and accommodation can be booked in four ways: travel agents; online or telephone reservation centres of travel and accommodation providers; online or telephone reservation centres of intermediaries; and corporate travel management organisations.
3. Travel documents must be organised well before the traveller leaves.
4. Confirm travel bookings before travel takes place. Review information provided in travel documentation, check the booking is what you wanted and check with the service provider that the booking is correct at their end.
5. Confirmation of travel arrangements can be made through e-tickets, paper tickets, electronic or printed airline itineraries, confirmation emails or letters from accommodation providers, and travel agent itineraries.
6. Travel arrangements can change after they have been booked. Use your original checklists to ensure all details and changes are covered in the new itinerary.
7. Record travel details within the organisation for future reference.
8. Provide travellers with the communication tools required while they are away, so colleagues, family, friends, travel agents, airlines, hotels and others can contact them if needed.
9. Establish points of contact throughout the traveller's journey and by providing mobile phone, email and fax access.

Learning checkpoint 2 Make travel arrangements

This learning checkpoint allows you to review your skills and knowledge in making travel arrangements.

Part A

1. Describe the four main methods of booking business travel.

2. Discuss the pros and cons of using each method listed in your answer for question 1 to book business travel for your organisation.

3. List and describe the travel documents that someone in your organisation, or an organisation you know about, may need when travelling domestically or internationally.

4. How you would go about arranging and organising travel/medical insurance and a travel itinerary for a traveller?

5. Explain how you can confirm travel arrangements are correct prior to departure.

6. Explain why organisations should record the details of all business travel undertaken by their employees.

7. Discuss the advantages and disadvantages of using a standard checklist to record travel details in an organisation. Identify three other methods of recording details that can be used.

8. Describe why it is important for communication arrangements to be made for travellers, especially those on overseas travel.

9. Explain how you could set up each of the following communication arrangements to ensure travellers from your organisation are contactable while they are away:
- Points of contact
 - Mobile phone access
 - Email and fax access

10. Travel policies and procedures are likely to provide guidance on what three broad aspects of organising travel? Provide one example of each area.

Part B

Read the following case study and answer the questions that follow.

Case study

An executive assistant has organised plane travel and also accommodation at a Sydney hotel on Tuesday 14th for his managing director to be able to attend a meeting with her interstate head office counterpart in the afternoon on the same day, ahead of the annual board meeting the following day. She is contacted by the airline two hours before scheduled flight departure to warn her that, due to the airline's computer system going offline, there are long delays at the airport.

Explain how you would make alternative travel arrangements when travel details (e.g. flight times, accommodation availability, and additional meetings) change at the last minute.

Topic 3

Arrange credit facilities

An important part of arranging a business trip is organising the financial details. This includes paying for flights or car hire when the trip is booked, as well as paying for incidentals, meals and accommodation during the trip.

All organisations have their own methods for managing everyday expenses and for paying for high-cost items, such as flights and hotels. It is important to know your organisation's policy on these matters to understand how individual travellers may be positioned. For example, senior managers may be issued with corporate credit cards, while junior staff members or infrequent travellers may not. You need to know what sorts of costs different trips will incur, both before the trip is taken and while the traveller is away.

Include a section in your business travel checklist for noting these requirements, and go through them all thoroughly with your traveller before putting any arrangements in place.

In this topic you will learn how to:

- 3A Confirm payment methods
- 3B Make credit arrangements

3A

Confirm payment methods

It is important that payment arrangements are organised well in advance so the trip runs smoothly for the traveller. You need to beware of the types of information you need to obtain before you start making any travel arrangements.

Arrangements governing payment methods include:

- an organisation's policies and procedures
- an organisation's credit arrangements
- the purchase conditions for accommodation, air travel, car hire, taxis and travel agents.



Organisational payment policies and procedures

The size of the organisation and the structure of its business may determine how it makes payments. For example, many large companies use corporate credit cards that are issued to all staff who travel, or to senior staff. Other businesses might pay for items using cheques or through a business app or ask staff to use their own (or a manager's) credit card and then reimburse them. This is especially so if bookings are made and paid for online.



When it comes to business travel, you may need to use a combination of different payment methods. Some parts of a trip require prepayment.

The payment method applicable may depend on the way travel is booked and organised. If bookings are made using an online booking facility, a credit card will be needed. If bookings are made via a travel agent, a consolidated invoice may be sent to the organisation's finance department at the end of each month.

Find out the payment terms of the different providers you contact when making or confirming a booking. Check with your supervisor, the traveller or your accounts department about which methods are acceptable. Do this before booking.

Types of payment methods

Here is a summary of the more common procedures organisations use to organise business travel.

Common payment methods

- Prepaying for airline tickets or car rentals that are booked online using a corporate credit card
- Asking staff to use their own personal credit cards when booking online, then reimbursing them via EFT, cash or cheque
- Using a credit card that is held by a person or team within the organisation that is used for certain expenses, such as airfares or hotel bookings
- Sending an official purchase order (for instance to a hotel) and then paying by cheque or EFT on receipt of an invoice
- Providing the traveller with a cash advance, traveller's cheques or cards that can be used in lieu of traveller's cheques for incidentals
- Prepaying for accommodation through a travel agent and then presenting a voucher at check-in to verify this
- Arranging an account with a provider that will be used on an ongoing basis and paying a monthly consolidated bill
- Providing staff with payment methods, such as Cabcharge cards or other charge cards that are linked to a particular organisation

Practice task 13

Read the case study, then answer the questions that follow.

Case study

Kelly travels widely, domestically and internationally in her role as senior designer for a furniture company.

Usually Justin, the assistant to the design team, organises her travel, but he broke his leg and is off work before her trip to Berlin. The employee who replaces him is not experienced in organising business travel. Kelly is busy and does not spend much time with her discussing what arrangements need to be made and how things work.

'Usually we book travel and pay for it before we leave by using a special credit card that our finance manager has. I told her about this, but when I went to check out of my hotel in Berlin, they told me I had to pay over \$1,600 for my room and other costs.

I was shocked and worried as I had no way of paying. I had used up almost my entire personal credit limit that month.

I explained the situation to the hotel staff and they called the manager out to talk to me, which was humiliating. It was night-time in Australia. They copied my passport details and credit card and took the name and contact number of the managing director of the company. I found out when I got back that they had called the MD while I was still flying home and he had arranged payment by electronic funds transfer to their bank in Germany. It was really embarrassing.'

continued ...

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1. What should Kelly have done before leaving to avoid such a problem occurring?

2. What steps should the temporary employee have taken to confirm the payment methods?

3B

Make credit arrangements

Organisations use a number of different credit arrangements to pay for and manage business travel expenses, and to help travellers while they are away.

Examples of methods of paying for business travel include:

- Cabcharge
- debit and credit cards
- foreign currency
- traveller's cheques and cash passports
- EFTPOS.

Cabcharge

Your traveller may need to use taxis during their trip. A number of payment methods are accepted by most taxi firms: Cabcharge cards or vouchers, credit cards or cash. For security reasons, many taxi drivers prefer to handle a minimum of cash, so it is helpful to make other forms of payment available to the traveller.

If the traveller does not have a Cabcharge card or other credit cards, try to estimate how many trips they will need to make in taxis and arrange for the issue of an appropriate number of Cabcharge vouchers.



Cabcharge is accepted in all states of Australia, Asia, Europe and North America and also covers some hire car companies and limousine services. It is available for use with any taxi that displays Cabcharge signage.

Debit and credit cards

Some organisations have special facilities to allow specified staff to obtain cash from ATMs using a company credit card. However, this is not general practice as there is a high security risk. Generally, the traveller will need a personal credit or ATM card to obtain the necessary cash, and claim the expenses back from the organisation.

A better exchange rate can often be obtained by using ATMs than by exchanging traveller's cheques at banks, but check in advance to see the fees your bank charges. As an example, your traveller could expect to pay three per cent as a foreign transfer fee, plus two per cent if it is a cash advance plus \$5 per transaction if the ATM is not part of the bank's global partner alliance.

ATM locators are useful online tools that enable travellers everywhere to identify automatic teller machines that accept their type of card. Look up locations prior to the traveller's departure and include details in their itinerary. Visa and MasterCard provide worldwide ATM locations on their websites.

Paying for services provided during a business trip on debit or credit cards offers organisations and travellers a number of benefits.

Benefits of using corporate cards for business travel expenses

- The convenience of being able to pay for almost everything – from meals to airfares – as the major credit card providers are accepted all over the world
- An easy method of tracking costs – one bill is provided at the end of each month so expenses can be tracked, analysed and reported on easily
- No problems regarding changing currencies and getting good exchange rates if your traveller is crossing international borders
- Setting limits and monitoring expenditure if staff are issued with corporate cards
- Ensuring confidence for the traveller, as unexpected costs – such as buying lunch for clients or buying plane tickets in case of emergency – can be charged to a corporate card
- Developing a centralised, common and efficient method of payment for organisations, which may result in a discount

Other money card products

There is frequent change and improvement in products available to make payment for business travel more convenient. It is worth keeping up to date with what is on offer.

Some organisations offer travellers the convenience of using a card that can be used to withdraw cash in the currency of the destination. For example, Travelex have a product called a Cash Passport that is available in the form of a Visa debit card or EFTPOS card. This is convenient and offers the security of a pin-protected card, just like a normal EFTOS or debit card. It also means that cash can be accessed from a wider range of locations (24 million Visa merchants and 1 million Visa ATMs worldwide) – not just places that cash traveller's cheques or exchange currency.



Whenever money is withdrawn from a compatible ATM overseas, it will automatically be in the local currency. Travellers need to be familiar with the exchange rate so they know how much they are withdrawing.

Learn more about the Travelex Cash Passport and research other products online.

Foreign currency

It is not a good idea for a traveller to carry large amounts of cash in any currency, as there is always a risk of it being lost or stolen. However, it is a good idea to carry small amounts of currency to cover; for example, taxi fares, tips or gratuities, or a cup of coffee.

If your traveller is not likely to be taking another trip for a while, it is best to change any notes that are left over at the end of the trip back into your local currency, as bank notes can sometimes be taken out of circulation and not accepted at a later date.

You can find information on exchange rates by visiting the website of a currency specialist such as American Express or xe.com.

Most major banks have currency conversion facilities on their websites. If you don't have access to the internet, you can check the rates with your bank over the telephone. The financial newspapers also supply daily rates for most of the major currencies.

Various locations offer different rates, some much better than others, so it is worth looking at a few different foreign exchange outlets at the traveller's destination.

Traveller's cheques

Traveller's cheques are a relatively safe, though becoming outdated, form of accessing funds when travelling in other countries, and they can be obtained from a bank or credit agency. Most large banks and agencies usually have stocks of traveller's cheques in the major currencies on hand, but others may have to order them for you. Make sure you allow plenty of time for making these arrangements.

There are two areas on the cheques that require the signature of the traveller. One must be signed immediately on receipt of the cheque and the other must be signed when cashing the cheque. The traveller's passport is usually required for proof of identification before any cheques can be cashed. Traveller's cheques are not transferable – they cannot be given to another person to use.

Cheques can be cashed at money exchange centres (which are located in most airports and cities) or in banks. Many large hotels also have facilities for exchanging traveller's cheques, although they usually charge an additional service fee.

Any traveller's cheques left over at the end of the trip can be either changed back into your local currency or put aside for another trip.

Electronic funds transfer (EFT)

Most individuals are able to access their own personal funds through their bank's website, and readily transfer funds from one account to another from anywhere in the world. This online banking option is also available to organisations.

There may be times when the traveller needs to have funds transferred electronically from one place to another. For example, they might need to have ready access to funds to make a special purchase on behalf of the organisation. This can be done through the organisation's bank directly to the traveller's account.

Other institutions also provide money transfer services, such as Western Union. A remittance advice from the organisation is forwarded through the bank or institution in one place to a bank or institution in another place. These can be accessed by the nominated person or organisation.

You can read more about electronic funds transfers for business purposes at the Western Union website at: www.westernunion.com.au.

Practice task 14

1. What arrangements should you make in case Cabcharge is not accepted in some of your traveller's destinations?

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2. If conversion and transaction fees add 5% to the cost of using an ATM overseas for a traveller and the traveller needs to withdraw \$375, how much will the transaction cost the business?

3. Access policies and/or procedures documents from your organisation, or an organisation that has published its policies online, relating to car hire for business use. Identify any specifications regarding the way payments are to be made.

4. What other benefits of having a credit card can you think of that would make life easier for a frequent business traveller? Think of some examples that might affect travellers within your organisation.

5. Visit the XE.com currency exchange webpage. Convert \$1,000 AU to euros.

Summary

1. Organisations should have policies and procedures in place regarding how payment should be made when booking travel and making travel arrangements and for payments during travel.
2. Ensure payment for various business travel items is organised and planned for in advance.
3. An organisation's procedures and policies impact on the method of payment used for various items.
4. The methods of payment available to organisations include accounts established with airlines, travel agents and other providers; purchase orders; corporate cards; having the traveller pay and reimbursing them at a later date; providing the traveller with cash in advance; and special arrangements made between the organisation and individual suppliers.
5. There are advantages and disadvantages to all payment methods. The most suitable methods depend on the nature of the travel, location and organisation.
6. Different methods of payment are requested by different service providers.
7. A combination of payment methods is necessary for many business trips.
8. Organisations need to establish ongoing credit arrangements to ensure travellers have access to credit while travelling.
9. Common credit arrangements used for business travel are Cabcharge, debit and credit cards, foreign currency, traveller's cheques and cash passports and electronic funds transfer (EFT).
10. Making credit arrangements can be a time-consuming and detailed process and needs to be addressed well in advance of the trip.
11. Payment and credit arrangement procedures and methods must be reviewed with the traveller well in advance of their departure.

Learning checkpoint 3

Arrange credit facilities

This learning checkpoint allows you to review your skills and knowledge in arranging credit facilities.

Part A

1. For each of the scenarios listed, describe which payment methods and credit arrangements you believe would work best and how these would need to be arranged prior to departure. Consider convenience to the traveller, as well as efficiency and complying with organisational policies designed to minimise costs to the organisation. The scenarios are as follows:

- Arranging airfares through a designated travel agent with which the organisation has a service agreement
- Paying for a hotel room and associated expenses on checkout
- Paying a local taxi company as they drop a traveller at their destination
- Paying for fuel for a rental car just prior to dropping it off
- Entertaining business colleagues, clients or potential clients
- Paying for an unexpected emergency airfare from an international location back to Australia

2. If a business traveller uses ATMs seven times while overseas to withdraw \$1,400 in total, and they are charged an additional 5 per cent for each transaction, how much has been charged in fees?

Part B

Read the scenario and answer the questions that follow.

Scenario

You are employed as personal assistant to the administration manager of an Adelaide-based safety consultancy employing 15 auditors who travel widely to metropolitan and regional Australia servicing clients.

Contracts are assigned to individual auditors who then make their own travel and accommodation arrangements. Bookings for flights, accommodation and hire cars are made using a company credit card. Each payment must be approved by your manager; auditors are responsible for submitting travel documents to you for processing and filing.

Auditors receive meals and incidentals allowance, which they can receive as a cash advance or claim reimbursement on production of receipts.

1. Identify the major forms of payment for business travel and discuss, using examples, their advantages and disadvantages for the organisation and its travel requirements.

2. Describe the kind of policies and procedures the organisation could put in place to guide payment for:
- booking travel and accommodation
 - making purchases while travelling.

3. Comment on how the organisation's travel payment procedures could be improved.