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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

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.

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

... continued

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.

continued ...

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.

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?

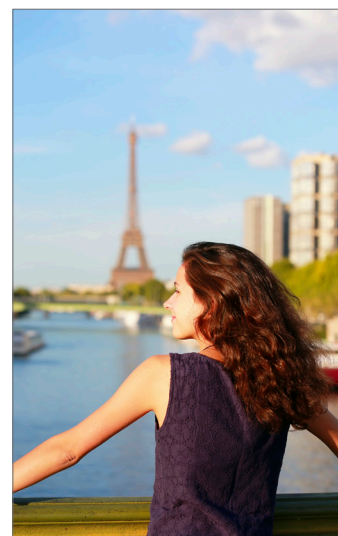
Preferences and requirements

- 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.



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.

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.

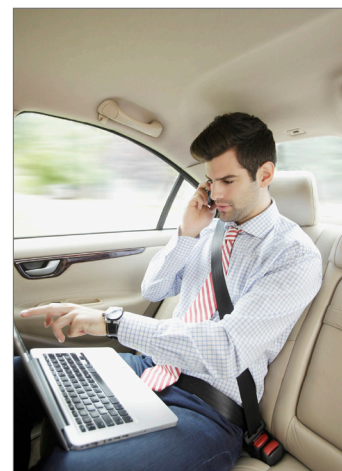
Office supplies

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.



1E

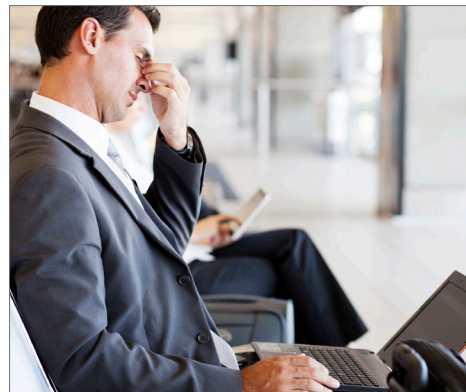
Prepare an itinerary to meet travel WHS requirements

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.

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		

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.'



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 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

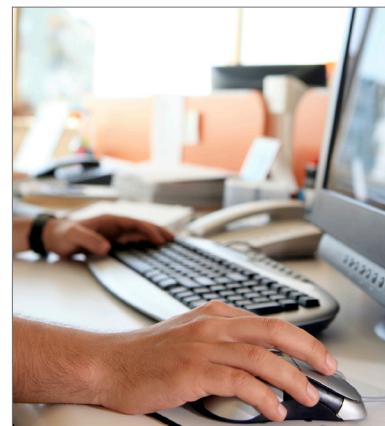
- Webcarhire
- Vroom Vroom Vroom

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.



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.

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.

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.

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

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 ...

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.