

How to create a winning business travel policy



CORPORATE
TRAVELLER™



A stress-free policy is the heart of your travel program

**Booking headaches.
Safety risks.
Budget blowouts.
Dissatisfied travellers.
Missed savings.
Sound familiar?**



Managing business travel can be complex. What to book, how to book, when to book. It's personal, but it also has to be within budget, aligned with company values, and put duty of care first.

The solution to this balancing act is an airtight travel policy.

A travel policy serves as a comprehensive guide, outlining budgets and specifying options for airfares, hotels, and car rentals, along with any flexible perks. This structure means your team has clear choices and the budget is protected.

Follow along for expert advice on building the right policy to set you up for success, along with top tips on how to implement travel policy effectively. And we're on our way!



Do we really need a travel policy?



Short answer ... **YES!**

As the heart of your travel program, the travel policy is responsible for keeping every aspect of business travel functioning smoothly. Covering bookings, approvals, payments, safety, and more, it gets everyone from travel bookers to business managers moving in the right direction. Plus, it keeps your finance and HR teams happy.

A thoughtful travel policy keeps all the checks, balances, and procedures in place so everything runs smoothly.



Top five ways a travel policy helps your business:

1. Controls travel costs
2. Makes reimbursements and expense policy crystal clear
3. Builds a trusted network of approved suppliers
4. Prioritises traveller safety and comfort
5. Reduces out-of-policy bookings and simplifies approvals

What should a travel policy include?



Keep it short and simple

- Avoid jargon or complex language so it's easy to understand.
- Keep it concise with only the necessary details.
- Tailor it to your unique needs and travel priorities.

The nitty gritty

- **Where and why:** Who travels where, and for what reasons? Set clear guidelines for domestic and international trips.
- **When:** Are there no-fly zones on your calendar, like the end of the year or budget crunches?
- **How:** Are trips booked through an online tool, a travel management company (TMC), or something else? How far in advance?
- **Preferred suppliers:** Lock in exclusive deals with preferred vendors for flights, accommodation, transport, and insurance.
- **Approvals:** Clearly list who gives the go-ahead on business trips.
- **Show me the money:** What's the process for handling expenses, payments, and reimbursements?
- **Backup plan:** How will policy non-compliance be managed or prevented?
- **Noise level:** Are there recurring questions or confusion about your policy? Check if there's a good understanding of the travel process.

The perks of the job

- **Classy, baby:** Who gets to book business class, fancy hotels, or premium rides? What about upgrades or lounge access?
- **Bleisure bliss:** Can employees add personal leave to business trips? If yes, be clear about who pays for what.
- **Points, please:** Are there any corporate rewards or loyalty programs in play?
- **Pocket money:** List specific allowances for meals or incidentals and if travellers can expense room service, mini bar drinks, or in-house laundry.

In case of emergency

- **Safety first:** Use travel suppliers with top-notch safety standards for flights, hotel stays, and transport. Include clear travel insurance guidelines.
- **SOS plan:** Prepare for disruptions like natural disasters, adverse weather, or strikes, with clear contacts for immediate help.
- **Keep it current:** Regularly review and update your travel policy to keep it relevant and effective.

Communicate clearly

Ensure your policy is easily understood and communicate it often to your employees to save a whole lot of frustration. Your TMC can work with you to develop either a visual or written travel policy that's under two pages, tailored to your business, and covers all the key travel questions. It also needs to be located somewhere easy to find and accessible for travellers on the go.

Keep calm and consult your team



Choosing your TMC team

With Corporate Traveller, setting up a travel policy is one of the first things we'll tackle with you. We've crafted more policies than we can count over 30 years in the travel business. Our travel managers, paired with our intuitive booking tool, make travel management straightforward, taking the pressure off you.

Working with us looks like:

- Digging into your travel data
- Setting realistic cost-per-trip goals
- Recommending optimal times to book and fare classes for air bookings
- Evaluating potential preferred supplier deals
- Assessing online vs. offline booking for your business
- Creating a policy that balances business needs and traveller wellbeing
- Integrating policies into an **online booking tool** and the overall business

Whatever your goals, we'll work with you every step of the way to achieve them. Our customer success team boasts an average tenure of six years and a depth of experience and expertise that few can match.



Corporate Traveller assists us with emissions data and reporting, while also providing analysis on our monthly spend and identifying areas where we can save. Our dedicated travel consultant is responsive and efficient with bookings and changes when needed, and the online booking tool makes self-service easy and convenient.

- Southbase



Strengthening your own travel team

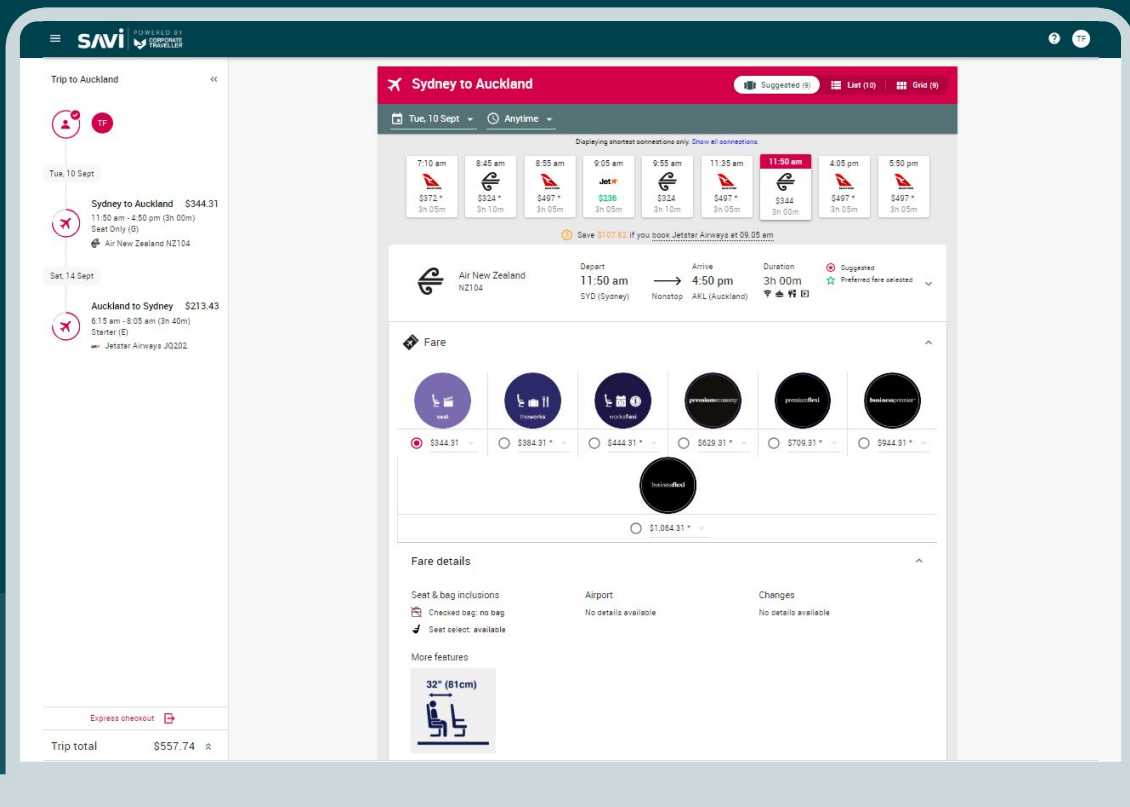
Travel policy should reflect your company's culture, structure, and business objectives. Involve the internal team from the get-go, including senior management, the finance team, and even a couple of frequent travellers. Their input will help shape a policy that works for everyone.



A solid travel policy makes all the difference. It's not just about saving money—it's about having a TMC partner who can tailor your policy to fit your business travel program. We take the stress out of travel, keep your team safe, and ensure every trip runs smoothly.

- Matt Niederer, Head of Customer Success for New Zealand





Let's talk tech

The right booking platform can simplify bookings, plus keep your team compliant and within budget.

Savi: Smarter booking and greater savings

Corporate Traveller's all-in-one platform, **Savi**, embeds your policy into the travel process and provides these added benefits:

- **Complete trip booking options:** Flights, hotels, and transport options that fit your guidelines.
- **In-policy bookings:** Only policy-approved options show up, keeping things simple and streamlining approvals.
- **Budget alerts:** Savi **calculates potential savings**, and notifies you if a booking is over budget to avoid unwanted surprises.
- **User-friendly design:** Fast, intuitive booking for even the busiest team members.
- **Advance planning perks:** Simple comparison tools encourage early bookings for better rates.

Reporting for tracking and smart decisions

Data, data, data, we all know its value! Our **Power BI Reporting Suite** digs deeper, putting insights at your fingertips. Drive smarter decisions by:

- **Tracking compliance:** Spot where policies are followed and where they aren't.
- **Analysing spend:** Get a clear picture of travel costs across your business.
- **Refining your policy:** Use data to make adjustments that save time and money.

Real-life results: Turning travel policy insights into solid savings

A leading regional retailer had a travel policy in place but lacked the data to enforce it effectively. Without clear visibility into booking behaviours and compliance, overspending and inefficiencies were becoming common challenges.

Corporate Traveller stepped in to provide the insights and tools needed to fine-tune their policy and drive better booking behaviour, which resulted in:

- **Soaring online adoption:** Bookings made online jumped from 34% in 2023 to 74% in 2024.
- **Reduced last-minute bookings:** Domestic trips booked within a week dropped from 34% to 22%.
- **Leadership-led compliance:** Reports on key leaders' booking habits drove a top-down focus on policy adherence.
- **Greater savings potential:** Behavioural reporting revealed areas to strengthen policy and improve cost control.



With a strong travel policy at the heart of its travel program, this retailer turned data into significant action. **The result?** A smarter, more cost-effective travel program driven by strategic decision-making.

The big questions for travel management

Now that you see why a travel policy is essential, here are some travel and business considerations to ensure it's top-notch:

- How will you keep in touch with travellers while they are on the road?
- How will you ensure travellers' safety and security?
- What is the emergency protocol when things go wrong?
- How many employees, senior leaders, or management team members can fly on the same flight?
- What's covered under your travel insurance and medical plans?
- Which countries and regions are regarded as high-risk and what's your company's stance on travelling to these destinations?

PRO TIP: Your travellers don't need to know every line of your policy. Focus on the parts that affect their bookings, spending, safety, and comfort while they're away.

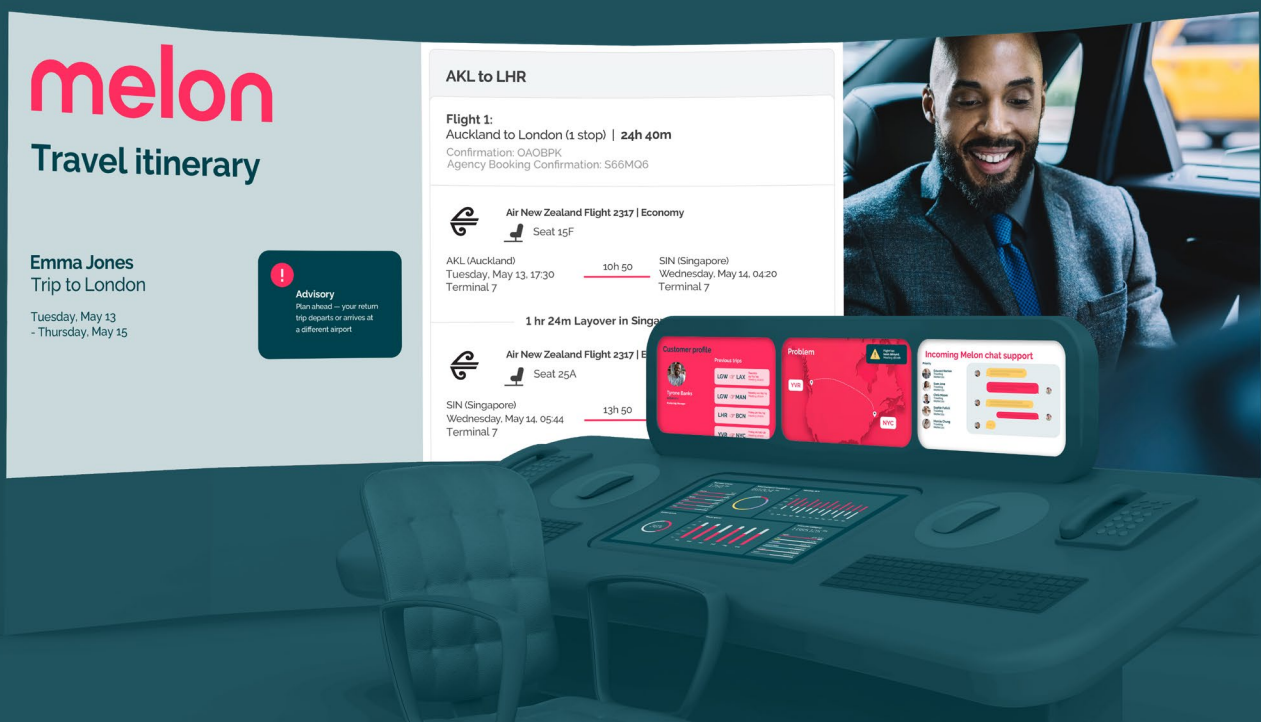
Keep it relevant

Travel is unpredictable, but a solid policy is your safety net when the unexpected strikes. Keep these questions in mind to make sure the policy stays up to date.

- How will you manage groups, VIPs, or those travelling to high-risk destinations?
- What's your protocol for unforeseen events like flight cancellations?
- Are you regularly updating your policy to keep it relevant and aligned with your business needs?

Your travel policy isn't a static document and it needs regular review to stay sharp. For a second opinion, lean on your TMC, senior team, or even **travel insights from your frequent travellers.**

At Corporate Traveller, our customer success management program is led by experts with extensive experience who guide your travel program with knowledge and care. We specialise in simplifying policy reviews and conducting regular travel program evaluations to ensure they meet your business goals, budgets, and the evolving needs of your people. Proactive solutions can help you create travel policies that work for your business so you can stay focused on driving it forward.



GENERAL



Book via our online booking tool



Corporate Traveller must be used for all travel bookings



Travel expenses must be submitted via the expense app within 30 days



Tax invoice required for anything over \$82.50 (incl. GST) and all international travel

DOMESTIC FLIGHTS



Always choose the **best fare of the day**



Select our **preferred airline**



Travel is **economy class**



Flights to be **booked 14 days in advance**

INTERNATIONAL FLIGHTS



Pre-approval required from your immediate leader



International flights must be booked in **economy class**



Select your **preferred airline** with the **best fare of the day**



Flights should be **booked +21 days in advance**

ACCOMMODATION



Preferred hotels are to be used



Maximum rate is **\$200 per night**



Self contained accom should be considered when staying in excess of 5 nights

Standard rooms are policy

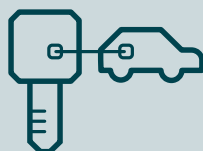


All accom must be **booked through Corporate Traveller**

CAR HIRE



Select **preferred car hire supplier**



Select the **smallest practical rental car**

Take collision damage waiver (CDW), in particular international

Take excess reduction insurance both domestically and internationally



Refuel before returning & **inspect the vehicle**

Travel policy checklist: 10 ways to refine your travel program



Your travel policy sets the tone for smooth, efficient travel. If it's due for a refresh or missing altogether, it's time to get it back on beat with these ten tips.

Put people first

Cost control matters, but so does traveller wellbeing. We can help you strike the right balance between maintaining budgets and employee wellness.

Be flexible within reason

Offering reasonable choices in flights, hotels, and perks boosts satisfaction without breaking the bank.

Lean on smart tech

Booking tools that are aligned with your travel policy add to compliance and convenience. Already using one? Let's make sure it's configured perfectly.

Simplify approvals

A simple, well-defined approval process keeps trips moving without endless back-and-forth.

Automate what you can

Save time and reduce errors by automating approvals, bookings, and reports.

Point out the no-nos

Clear guidance on what's not allowed avoids confusion and keeps everyone on track. Our travel experts can help you clarify any grey areas.

Make reconciliation easy

Make sure your policy details how to manage the reconciliation processes for travel expenses, and provide links to any software or apps needed.

Keep it handy

A policy that's easy to find is one your team is more likely to follow. We'll help you bring it front and centre.

Revisit and refresh your policy

Update your policy yearly to keep it relevant and effective. Consider this your nudge to make it happen.

Keep it simple with a visual travel policy

A clear, easy-to-understand visual policy on a page is one your team will keep to.

Let's take travel policy to new heights

At Corporate Traveller, we've been living and breathing corporate travel for over 30 years. Let us take care of the details so you can focus on what really matters: running your business.

[Get started now!](#)

