

TripActions

Let's go.

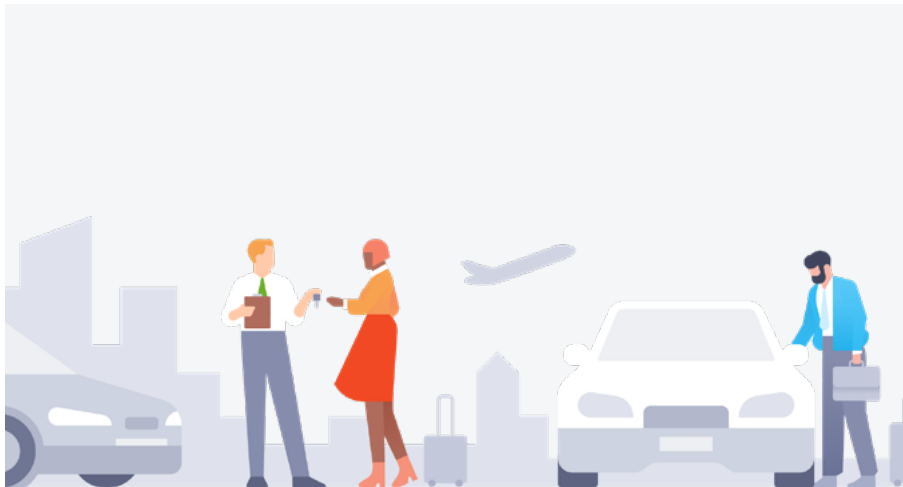


Corporate Travel Solution Buyer's Checklist

Managing corporate travel isn't easy in today's globally distributed, always-on business world. Have you been flying by the seat of your pants while unmanaged? Or previously implemented a solution that travelers don't actually use? If it's time to level-up your corporate travel game, you've likely been feeling the pain.

Unmanaged travel and never-used travel tools both pose the same challenge for businesses: If trips aren't booked and managed in one centralized place, the organization loses visibility into travel spend and behavior, and misses out on opportunities to save costs and optimize the overall program.

Whatever your path, if you're reading this, you likely recognize the need for a change. But with so many corporate travel solutions out there, choosing and implementing the right fit for your business is no simple task.



This checklist was designed to help travel managers, finance leaders, and procurement teams thoughtfully navigate the buying process. Simply check off the boxes that align with your specific business needs to better understand what to look for in your ideal corporate travel solution.



Assemble Your Dream (Stakeholder) Team

Think inclusively about who will be impacted by implementing a new solution. Each department will have unique considerations and needs that should be represented if you're going to find the best fit. We suggest including:



TRAVEL

If your company doesn't have a dedicated travel manager, then include whoever is closest to coordinating and supporting the organization's travel needs.



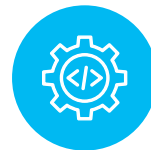
FINANCE

If you choose to purchase and implement a new tool, this team will want to see how it helps cut costs and integrates with existing expense tools.



HUMAN RESOURCES

Travel is an increasingly important aspect of recruiting and employee satisfaction – your people team will want to ensure your proposed solution delights rather than frustrates travelers.



PROCUREMENT & IT

Travel software will likely interact with your company's entire existing technology ecosystem – looping these teams in early will save a lot of headaches later on.



ROAD WARRIORS

Include at least one person from the departments that travel the most. This varies from business to business, of course, but commonly includes sales, customer success, and marketing.

1 Make a list of what you'd like to improve in your current corporate travel solution or program.

2 List the features you want to see in your new solution and then divide them into two categories:

Need-to-have:

These are the items you consider essential. You won't consider any solution that doesn't have this functionality.

Nice-to-have:

These items might not be essential but would be useful. You'll consider a solution that doesn't have them, but will score a solution that includes them more highly.

- Implementation is quick, seamless, and easy.
- It's easy to measure ROI.
- It fits in with your existing tech stack.
- It surfaces a wide variety of inventory — from a wide variety of sources — for any given search.
- It ensures travelers know without a doubt what options are in and out of policy.
- Travelers are able to book every portion of a business trip in a single, centralized place.
- Travel managers can easily set and apply dynamic policies according to business needs.
- It calculates a fair market price and applies the most cost-effective policy for each individual search.
- Travelers are able to book and gain loyalty points with their preferred suppliers.
- Finance can track spend across individual travelers, departments, and cost centers.
- It shows admins where all the organization's travelers are located at any given time.
- It provides customizable real-time dashboards that display the data that matters most to the business.
- It offers robust reporting capabilities.
- It can track overall spend, what's booked in and out of budget, and traveler adoption rates.
- It supports admins and travelers across the company as the business grows and scales domestically and internationally.

Remember

Make Sure You Consider Traveler Adoption

All the features in the world won't matter if the solution's user experience is so awful that your travelers aren't actually using it. Consider making those line items that significantly boost adoption — such as offering a mobile experience — “need to haves.”

- It balances the traveler experience with cost considerations.
- It makes use of smart, AI-driven technology to offer personalized results for each traveler.
- It provides proactive, global 24/7/365 live human traveler support.
- The user experience is comparable to what travelers find on popular consumer sites.
- Travelers can book and manage trips on their laptops, mobile devices, and more.
- Traveler profiles help tailor search results to suit individual preferences.

Identify Your Preferred Corporate Travel Solution

Now that you've defined your requirements and know who will be vetting the options, it's time to decide which solution best suits your needs. There are some easy channels you can turn to on your quest for the right fit:

Search:

Searching for terms like “corporate travel software” can be a blunt instrument, but it can be effective in helping identify the most relevant players in the space.

Activate Your Network:

There's nothing better than testimony you can trust. Have all your stakeholders reach out to learn what software solution their network uses and what they think of it.

Remember

Don't Overlook the Newer Kids on the Block

Take some extra time to identify up-and-coming and disruptive solutions. Legacy companies may have the advertising budgets to rank high on search, but may not necessarily be the best fit for your business.

Remember

Ask for References

Don't hesitate to ask to connect with other customers who can speak to you about their experience with the product. A company that's confident in its ability to deliver results for the business while maintaining traveler satisfaction will happily put you in contact with one of their customers.

Taking the Demo

Once you've completed this checklist and knocked out your "need-to-haves" and "nice-to-haves," it's time to reach out to the corporate travel solution vendors that line up with your criteria and learn more about how they can work with you to meet your needs. These initial conversations can be telling — if they're unresponsive or rushed, be cautious. Your experience as a customer is unlikely to improve after purchase.

Have every stakeholder participate in all scheduled demos and catalog answers to key questions, including:

- What customer support is included?
- Is training/onboarding included?
- What other business tools does it integrate with?
- How often is it updated? What new and exciting features are on the product roadmap?
- How intuitive is the solution? What's the user experience like for travelers?
- How does it fulfill or fall short of your list of feature requirements?

Remember

Keep Evaluating

While you should of course give any new solution plenty of time to prove its worth (or lack thereof), make a product review an annual discipline — and don't be afraid to make a change if your previously chosen tool isn't measuring up your initial expectations.

Coming to a Conclusion

You've identified your needs. You've put the right team in place. You've done your due diligence. Now, it's time to make a decision.

Before you move to get sign off from key stakeholders, make sure you can answer the following:

- Features:** How do the software's features match up with your initial list?
- Cost savings:** What is the predicted ROI?
- Support:** Will the solution be equipped to assist you and your travelers 24/7/365?
- Implementation:** How fast will you be able to get the system up and running?
- Organizational momentum:** Can the solution keep up as you grow and scale your business?

Choosing a corporate travel software solution can feel overwhelming at first, but if you follow this guide and approach the buying journey thoughtfully and strategically, the results will be well worth the effort.



We believe being there in person is powerful. It enables employees to build relationships, close deals, and drive growth. Fast becoming the default for corporate travel, TripActions is the modern business travel platform that combines the latest AI-driven technologies with unrivaled inventory choice and proactive, global 24/7/365 live human support to delight employees, finance leaders, HR professionals, and travel managers alike – all while empowering organizations to seize travel as a strategic lever for culture and growth.

Delivered within a powerful, easy-to-use mobile-first interface, TripActions helps more than 2,000 customers globally – including WeWork, Lyft, SurveyMonkey, Marine Layer, Chubbies, Sara Lee Frozen Bakery and the ACLU – reduce average booking time from 60 minutes down to six while achieving an unprecedented 93% traveler satisfaction and up to 34% savings on lodging alone.

The future of business travel has arrived. Power your organization's growth and delight your employees with TripActions. Let's go!
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