

# HOW TO CLEAN UP YOUR BUSINESS TRAVELER PROFILES

## Review your business travelers' profile information at least once a year

Have you reviewed your business travelers' profile information lately? Things happen: travelers retire or leave the company; organizations reorganize workforces; and employees who used to travel won't do so in the future. Updating traveler profile information should happen at least annually and will require action from travelers and travel managers.

1

### Review all profiles annually.

Set aside time each year to review the names of employees who are approved to travel for business. At minimum, this could happen annually during your company's "slow travel season" (if such a time exists), but regular checks throughout the year may prove more efficient.

- We recommend using an HR feed for profile delivery.
- Run reports from the online booking tool (OBT) and compare them against the company's employee reports; purge travelers who are no longer with the company or no longer traveling. For new and separated employees not on an HR feed, add or update profiles as soon as the employment status changes.



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### Create step-by-step instructions.

Create step-by-step instructions with visuals on how to update the traveler's profile.



2

### Get your business travelers involved.

Travel managers should use internal approved communication channels to advise travelers to update fields not included on the feed. Suggestions for traveler messaging:

- Ask them to add, review or update their preferences, reward numbers, and any pre-approved federal or government pre-approval security programs, like TSA/Global Entry in the U.S.
- Ask business travelers to check email, phone, and emergency contact information.
- To avoid tickets not being issued, please ensure credit card numbers and expiration dates are accurate.

4

### Set up a communication plan.

Set up a communication plan using Traveler Engagement tactics to influence your business travelers' behavior:

- Make it a habit: Throughout the year, send travelers regular reminders to review and update profile information; encourage them to do so again each time they make reservations.
- Use the company notes page in the online booking tool (OBT) to send reminders.
- Use pop-up messaging at login
- Add a blurb to your company newsletter, if possible.
- Send messages via TripSource®, a travel app exclusively designed to give BCD Travel clients and their travelers greater control over the trip experience.

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Questions? Email: [move@bcdtravel.com](mailto:move@bcdtravel.com)