

HOW TO WRITE A TRAVEL POLICY

A 6-step guide to writing a travel policy for your program

When it's time to travel for business, employees need to know what's allowed, when to book, what supplier to book – and most importantly, why. A well-crafted travel policy provides a consistent, safe, managed and cost-controlled framework that leads to wise travel decisions.

1

Set goals.

Define what you want to achieve with your travel program. Are you going for cost savings, transparency, traveler satisfaction, wellbeing, sustainability or a combination?



2

Cover everything.

Describe the entire booking process from A to Z. Organize it by relevant priorities as agreed with all travel program stakeholders. There's no one-size-fits-all approach for writing a travel policy, but consider these items as you outline your document:

- Introduction/objective
- Approval/pre-approvals
- Booking/reservations
- Bleisure policy
- Definitions and terms
- Expense reporting
- Gifts
- Guest travel exceptions
- People risk management
- Spending/expense guidelines
- Transportation guidelines

3

Write for your audience.

Remember that travelers are busy consumers. The travel policy document should be thorough, but as short as possible. Use clear and easy to understand language. Don't neglect the appearance of the document itself. It should be well designed with examples or illustrations of relevant documents and booking tools. Make sure it's available digitally and can be downloaded onto any device.



4

Educate, inform, communicate.

Make sure everyone at your company (especially travelers) has access to the travel policy and knows who to contact with questions. Store the policy on the intranet or other central communication channel. Integrate traveler-friendly mobile apps, like BCD's award-winning [TripSource](#)® platform, which simplifies business travel and keeps travelers organized, informed and within company guidelines. For travel and security managers, the BCD Alert™ mobile app, provides 24/7 coverage of active travelers against destination risk and incidents, allowing managers to monitor and respond remotely.

5

Measure your success.

What does a successful travel program look like for you? Define the parameters you'll measure. If saving is your goal, you should measure total travel spend. Other things you can measure are compliance or traveler satisfaction.

6

Plan regular reviews.

With your travel program stakeholders, decide on a comfortable cadence (quarterly, annually or other) for reviewing, auditing and revising the travel policy. As part of this plan, decide how interim policy changes will be communicated to your organization.



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Questions? Email: move@bcdtravel.com