The business travel management checklist

This checklist is your go-to resource for ensuring smooth, efficient, and enjoyable business travel experiences for your team.

Pre-trip planning

☐ **Define travel needs**
- ☐ Confirm travel dates and destination, allowing for flexibility if possible.
- ☐ Clarify the purpose of the trip (meeting, conference, client visit, etc.).
- ☐ Gather traveller preferences (transport, accommodation, accessibility needs).
- ☐ Note any special requests (dietary restrictions, extra luggage, etc.).

☐ **Set clear travel policies**
- ☐ Establish booking procedures (preferred vendors, booking windows, approvals).
- ☐ Define expense guidelines (limits on accommodation, meals, transport).
- ☐ Create a straightforward travel approval process.

☐ **Calculate estimated costs**
- ☐ Consider all expenses including airport taxi transfers, taxi journeys between hotel and meeting places.
- ☐ Negotiate with vendors for better rates.
- ☐ Use a taxi management platform like FREENOW for Busines to track expenses.
- ☐ Plan efficient travel routes.

## Booking and logistics

☐ **Streamline bookings**
- ☐ Prebook ground transport whenever possible with FREENOW for Business.
- ☐ Create and manage detailed itineraries.
- ☐ Coordinate travel arrangements with relevant parties.

☐ **Choose the right transportation**
- ☐ Evaluate flights based on duration, cost, and airline reputation.
- ☐ Consider trains for shorter, more sustainable journeys.
- ☐ Select appropriate ground transportation (taxis, ride-hailing, eco-friendly options).

☐ **Arrange accommodation and essentials**
- ☐ Book hotels based on location, amenities, and budget.
- ☐ Secure necessary visas and travel documents in advance.
- ☐ Arrange airport transfers, travel insurance, and other essential services.
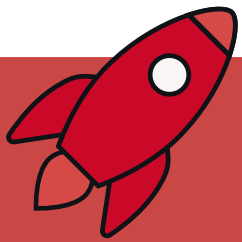
During the trip

☐ **Stay connected**
- ☐ Use communication tools (email, messaging apps, in-app chat).
- ☐ Provide travellers with real-time updates and support.
- ☐ Ensure travellers have access to emergency contacts.

☐ **Manage disruptions**
- ☐ Prepare for flight delays and cancellations with contingency plans.
- ☐ Have protocols in place for handling unexpected events (illness, lost luggage).
- ☐ Build flexibility into travel itineraries.

☐ **Ensure traveller safety**
- ☐ Implement a travel risk management plan.
- ☐ Secure adequate travel insurance coverage.
- ☐ Establish clear emergency protocols.
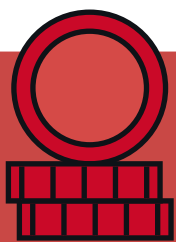
Post-trip reconciliation

☐ **Simplify expense reporting**
- ☐ Automate expense reports with a travel management platform like FREENOW for Business
- ☐ Use centralized billing for easier reconciliation.
- ☐ Enforce compliance with expense policies.

☐ **Analyse travel data**
- ☐ Track key metrics (travel spend, destinations, transport modes).
- ☐ Identify cost-saving opportunities.
- ☐ Analyse travel patterns to predict future needs.

☐ **Gather traveller feedback**
- ☐ Collect feedback through surveys, forms, or in-app ratings.
- ☐ Analyse feedback to identify areas for improvement.
- ☐ Implement changes based on traveller feedback.

Trusted business travel partners

About us

FREENOW for Business is your one-stop shop for managing all things ground transportation. From booking and managing rides to tracking expenses and ensuring your travellers' safety, FREENOW for Business simplifies ground transportation so you can focus on other things.

TravelPerk

If you're looking for an all-in-one platform to handle all aspects of business travel, TravelPerk is your go-to. They've got you covered for flights, trains, hotels, and even rental cars. Plus, they offer tools for managing expenses, ensuring compliance, and providing support to your travellers.

SAP Concur

SAP Concur offers a comprehensive suite of tools to manage every aspect of business travel, from booking and itinerary management to expense reporting and data analysis. It's the ultimate tool for large companies with complex travel needs.

Expensify

Say "goodbye" to the headache of manual expense reports! Expensify automates the entire process, from capturing receipts to submitting reports and getting reimbursed.

Riskline

Keeping your travellers safe is a top priority, and Riskline can help. They provide real-time travel risk intelligence and alerts, so you can stay informed about potential safety issues and make informed decisions to protect your employees.

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