CORPORATE TRAVELER™

Business Travel Program Analysis Toolkit

To futureproof your business for years to come, a deep dive into your current travel program is essential. That's why we've put together this comprehensive Business Travel Program Analysis Toolkit.

This is your go-to guide for finding opportunities to save money, streamline operations, and boost traveler experiences.

Whether you're revamping your existing travel management or preparing to select a new travel management company (TMC), this toolkit will give you step-by-step templates, checklists, and worksheets to help you align your travel program with your company's broader goals.

Let's get started.

1. Program evaluation template

Purpose:

Use this template to analyze your current travel management practices, identifying strengths, gaps, and areas for improvement.

Instructions:

Complete each section to rate your current practices in four key areas: policy compliance, cost control, traveler satisfaction, and reporting/visibility.

Score your answers to see where you stand:

- 1–2 "Yes": Immediate attention needed
- 3–4 "Yes": Room for improvement
- 5+ "Yes": Solid, but could benefit from fine-tuning

Evaluation Area	Current Practices	Answer	Score (1-5)
Policy Compliance	Are travelers aware of the company's travel policy?		
	How often are travel policy breaches reported?		
	Is there clear communication of travel policy updates?		
	Does the policy support all types of travel (e.g., domestic, international)?		
	Is duty of care embedded in the policy?		
Cost control	How effectively does your current program manage expenses?		
	Do you utilize corporate travel savings through preferred vendors?		
	What is the average lead time for booking flights?		
	What percentage of bookings are made at peak rates?		
	Do disruptions (cancellations, delays) significantly impact costs?		
Traveler satisfaction	How do travelers rate their experiences?		
	Are there frequent complaints about itineraries or support?		
	Is there a feedback system in place for continuous improvement?		
	Does your program cater to diverse traveler needs (e.g., accessibility, convenience)?		
Reporting and visibility	Are current tools providing comprehensive data on expenses and compliance?		
	Can your team track spend per trip category (flights, accommodations, etc.)?		
	How quickly can data be accessed for audits and decision-making?		
	Is reporting detailed enough to identify cost-saving opportunities?		

2. Cost analysis worksheet

Purpose:

Use this worksheet to break down your travel expenses, pinpointing areas where you can optimize costs.

Instructions:

List your known expenses by category and identify cost-saving opportunities.

Expense type	Budgeted cost ($)	Actual cost ($)	Variance (%)	Notes on savings opportunities
Flights				
Hotels				
Ground transport				
Meals				
Insurance				
Others (please specify)				

Prompts for analysis:

- Are last-minute bookings driving up costs?
- Are vendor discounts being utilized?
- Are there alternative vendors offering better rates?

Pro-tip: Regularly compare your budgeted vs. actual expenses to understand where savings can be maximized.

3. Compliance checklist

Purpose:

To make sure your travel policy is comprehensive, inclusive, and adhered to by all employees.

Are travelers briefed on policy guidelines before bookings?

Is policy training conducted annually?

Are there clear procedures for out-of-policy bookings?

Does the policy address the needs of all types of travelers?

Are emergency contacts updated in traveler profiles?

Is there a system for tracking policy compliance?

Are there clear consequences for non-compliance?

Is duty of care incorporated into the policy?

4. TMC comparison chart

Purpose:

To help you compare potential TMCs based on essential services and features.

Criteria	TMC 1:	TMC 2:	TMC 3:
Cost savings strategies			
Global reach and local expertise			
Technology integration			
Reporting capabilities			
24/7 traveler support			
SLAs and compliance management			
Customization options			
Sustainability initiatives			
Duty of care protocols			

Pro-tip: Use discovery workshops to assess how well each TMC aligns with your company's culture and long-term goals.

5. Action plan template

Purpose:

Guide your team through setting actionable goals, tracking progress, and measuring the impact of your travel program analysis.

Template Sections:

A. Goal Setting

- Define short-term and long-term goals for your travel program (e.g., reduce costs by 15%, increase policy compliance by 20%).

B. Action Steps

- List specific actions (e.g., negotiate new vendor contracts, conduct policy training).
- Assign responsibilities and set deadlines.

C. Progress Tracking

Action step	Responsible party	Deadline	Status
Conduct policy training webinar	HR/Travel team		
Negotiate vendor contracts	Procurement team		
Integrate new reporting software	IT/Finance team		
Implement traveler wellness programs	HR/Travel team		
Schedule training on new tools	Training team		

D. Impact Measurement

- Evaluate the ROI of implemented changes every quarter.
- Collect feedback from travelers for qualitative insights.

Conclusion

A strong business travel program is essential for staying competitive and cost-efficient. This toolkit allows you to identify gaps, streamline processes, and position your company for long-term savings. Ready to set your travel program up for success?

Dive into each section, and let's make 2025 your most efficient year yet!