DIPLOMA IN
OFFICE ADMINISTRATION

The Procedures for Arranging and Paying for Business Travel and Accommodation

MODULE BOOK

GLOBAL EDULINK

Together, shaping your future...
Learning Outcomes

* Business Travel.
* Arranging Business Travel.
* Travel & Accommodation Request Form.
* Booking Travel & Accommodation.
  * Methods of Transport.
  * Accommodation.
* Planning Business Travel.
* Methods of Payment.
Business Travel

• You discovered in Admin Services Outcome 4 that developments in Information Technology have resulted in organisations working within the global market.

• As a result of this, more and more organisations need to send their employees on business trips so that they can communicate with their customers, suppliers and colleagues.

• There are situations whereby e-mail or videoconferencing are not suitable and that face-to-face communication is essential:

  • Demonstrating a new product to customers – they need to be able to physically see it, ask questions, test it themselves.

  • Meetings among Senior Management – they may need to decide on the long-term direction of the organisation (this takes time and an awful lot of negotiations).

  • Training employees – one branch may have particular expertise and knowledge and other employees are sent there to learn the new skills.
Arranging Business Travel

• It is the responsibility of the Admin Assistant to arrange the business travel for an employee.

• However, in order for the Admin Assistant to complete the task effectively, there are vital pieces of information which are required:

  • The details of the employee travelling: *name; job title; department.*
  
  • The destination of the business trip: *is it a UK destination or is the employee travelling abroad?*
  
  • The dates of travel: *is it a day trip or is the employee travelling over a number of days?*
  
  • The purpose of the trip: *is it to present information to customers or receive training on a new piece of software?*
  
  • The budget: *how much money is there available for travel, accommodation, car hire etc?*
Arranging Business Travel

- It is very important that the Admin Assistant finds out about any special requests the employee has before the trip is planned.

- For example:
  - Is there a specific mode of preferred transport (some people have a fear of flying and would prefer to go by boat)?
  - Is there a specific type of accommodation preferred (some people only like to stay in Hotels and not Bed & Breakfast)?
  - Are there any dietary requirements (some people are vegetarians)?
  - Does the employee require Internet access in the accommodation (this could determine where the employee stays)?

- In order to make sure that the employee’s requests are met, it is essential that the Admin Assistant has a copy of each one in writing – this makes it easy to check that all items have been addressed. This information is gathered in a:

TRAVEL AND ACCOMMODATION REQUEST FORM.
Travel & Accommodation Request Form

• Your teacher will provide you with a template of the information which is required in a Travel & Accommodation Request Form.

• It is important to note that the employee travelling must be provided with this form in advance of the trip so that there is a greater chance of all the requests being met.

• It is important to have this information written down so that it can be referred to at any time to check that the correct plans are being made. It ensures that there are no errors made in the travel arrangements. For example, changing a flight at short notice is very expensive and the organisation may not have the budget required to cover such costs.
Travel Request Form

Data: ____________________

Employee Name: ____________________
Employee I.D.: ____________________
Employee Department: ____________________
Contact Phone: ____________________ Contact email: ____________________

Dates Requested: ____________________
Business Purpose: ____________________
City: ____________________ State: ____________________ Country: ____________________
Do you need Hotel Reservations? Yes No
If yes, than Hotel Name: ____________________ Hotel City: ____________________
Do you need Travel Reservations? Yes No
If yes, then Airline/Bus/Train Name: ____________________ From: ____________________ To: ____________________
Do you need a rental car? Yes No

Employee Signature: ____________________ Date: ____________________

Travel Request Approved: Yes No

Notes: ____________________

Manager Signature: ____________________ Date: ____________________
Booking Travel & Accommodation

• Once the Admin Assistant has gathered all the requirements of the trip there are a variety of sources of information which can be used to organise the trip.

• Examples of sources of travel information are:
  • The Internet
  • Travel timetables
  • Travel Guides
  • Hotel Directories
  • Maps

• It is really important that whenever the Admin Assistant is booking Travel & Accommodation that the organisation’s policies and procedures are followed. For example:
  • Ensure that the budget is followed at all times.
  • The organisation may have a contract with a Flight Company therefore all bookings must go through them.
  • The organisation may have a contract with a particular hotel chain.
Booking Travel & Accommodation – The Internet

- As has already been discussed in Admin Services Outcome 4, the Internet is an excellent source of information. The advantages of using the Internet as a source of travel and accommodation information are:
  
  - The information regarding travel and accommodation is up-to-date and can be easily accessed.
  
  - The Admin Assistant is very easily able to compare prices of companies and get the best value for money – lots of discounts available on the Internet!
  
  - It saves the Admin Assistant a lot of time as all arrangements can be made from the office at the click of a button!
  
  - Confirmation of all bookings are received via e-mail therefore the Admin Assistant has the security of knowing that all plans have been made for the correct dates of travel.
Methods of Transport

• There are a number of factors the Admin Assistant must take into consideration before deciding upon the mode of transport for the business trip:

  • **THE LENGTH OF THE JOURNEY**
    • Is the employee travelling abroad?
    • Is the employee travelling within the UK?

  • **THE AMOUNT OF TIME AVAILABLE TO TRAVEL**
    • If the employee has an urgent meeting, then a suitable mode of transport would be needed to make sure that he/she got there on time.

  • **THE COST OF TRAVEL**
    • Organisations often work within very tight budgets therefore it is essential that the Admin Assistant gets the best value for money and makes use of any discounts available.

  • **THE EMPLOYEE’S POSITION IN THE ORGANISATION**
    • Depending upon the employee’s seniority this can determine how much money is allocated to a business trip. For example, a salesperson will not be entitled to first class travel unlike a Managing Director.
Methods of Transport - Road

**ADVANTAGES**

- The employee is able to plan his/her own trip. For example:
  - Choose his/her route.
  - Decide when to take a break from the journey.
  - If enough time, take detours to visit some attractions en route.
- It is quite a cheap method of travel.

**DISADVANTAGES**

- The employee’s journey could be seriously delayed if there are any road works or traffic jams. This can affect the employee in a number of ways:
  - The employee may become stressed and turn up at his/her meeting very unfocussed.
  - The employee may become exceptionally tired.
  - The employee may become stressed in fear of being late for his/her meeting.
Methods of Transport - Rail

**ADVANTAGES**

- This a very effective mode of transport if travelling within the UK as it is relatively fast.

- The Admin Assistant is able to pre-book tickets which ensures that the employee is guaranteed a seat for the whole journey.

- The employee is able to relax and prepare for his/her meeting whilst sitting on the train.

**DISADVANTAGES**

- The train service is not always reliable and some trains can be cancelled all together – this would result in the employee missing his/her meeting.

- If the employee was travelling at a peak (the busiest) time then it would be very expensive.

- Not all train services offer direct routes therefore the employee may be required to change trains during the journey – this is very inconvenient especially if the employee is working through some tasks during the journey.
Methods of Transport - Air

**ADVANTAGES**

- This is the fastest mode of travel therefore very useful if the employee requires to get to his/her destination quickly.

- There are many facilities which airports offer (use of the Internet; restaurants; sleeping bays etc) therefore this is very useful if the employee has a long wait for or between flights.

- The employee is able to travel in comfort and therefore is very relaxed – good preparation before a meeting!

**DISADVANTAGES**

- This is a very expensive mode of transport (however, Internet prices are now offering very competitive rates!).

- If there was bad weather this could affect whether or not the plane actually leaves the airport – cancellations are possible.

- The Admin Assistant would need to ensure that the employee’s luggage does not exceed the weight limit otherwise he/she would be charged.

- If flying abroad, the employee may encounter long check-in times.
**Methods of Transport - Sea**

**ADVANTAGES**

- The employee is able to take his/her car on a ferry.

- There are many sailing times offered on most popular routes – the ferry is a very common mode of transport if people are travelling to/from the mainland or to other islands. Caledonia MacBrayne is the popular Ferry Company which operates in Scotland.

- There are many facilities offered on board to accommodate for all passengers: restaurants; shops; sleeping facilities etc.

**DISADVANTAGES**

- If there was bad weather then the ferry service could be cancelled.

- A lot of time has to be given to all passengers boarding and disembarking the ferry.

- The ferries are not usually located near city centres which means that if the employee did not have a car, then a taxi would be required which could end up being very expensive.

- During peak times it is essential that tickets are pre-booked as it is a very popular mode of transport.
Accommodation

- There are a number of factors the Admin Assistant must take into consideration before deciding upon the type of accommodation. For example, does the accommodation provide:
  - Internet facilities?
  - Telephone facilities in the room?
  - A private bathroom?
  - Food and drink services late at night/early in the morning?
  - Fast check-out service?
Travel & Accommodation Booking Forms

• Once both the travel and the accommodation have been decided the Admin Assistant must clearly write down the requests on both a Travel Booking Form and an Accommodation Booking Form.

• It is essential that it is clearly presented so that the employee’s needs are met.

• It is also important to confirm price so that when the employee arrives there is no chance of prices increasing.

• Once both factors have been booked, the Admin Assistant should receive a letter of confirmation clarifying the dates of travel; the type of accommodation booked; the mode of transport chosen; the agreed cost; and, any other special requests (eg. Internet access).
The Importance of Using Travel & Accommodation Booking Forms

- There are many reasons why it is important to use Travel and Accommodation Booking forms:
  - It is essential that it is clearly presented so that the employee’s needs are met.
  - If there was an error in the booking (for example the Hotel was double-booked), the Admin Assistant could refer to the form to confirm that the booking was agreed.
  - The Finance Department is able to refer to the form once the trip has taken place and easily record the costs.
Planning Business Travel

- The next stage is for the Admin Assistant to PLAN the business trip.
- This is done using an ITINERARY.
- An Itinerary is a plan of travel arrangements and includes the following details:
  - The dates of the business trip.
  - Important times the employee must note (times are always presented using 24 hour clock). For example: departure times; meeting times etc.
  - References for travel. For example: flight numbers; train numbers; name and address of car hire company.
  - Addresses and telephone numbers for travel and accommodation companies.
  - The names of people the employee is meeting as well as the venue address and times.
The Importance of an Itinerary

- The Itinerary is essential in planning a business trip for the following reasons:
  - The employee’s schedule is in order and clearly states where he/she is expected to be and with whom each day.
  - The Admin Assistant has a copy so that the employee can be contacted at any time.
  - The people whom the employee is meeting with will be aware of other commitments and priorities and therefore plan their meetings to fit around the employee’s busy schedule.
  - The Admin Assistant prepares other travel documents to ensure that the employee is fully equipped for the trip:
    - Up-to-date passport.
    - Currency.
    - Relevant Maps.
The Layout of an Itinerary

- An Itinerary could be presented in the following format:

<table>
<thead>
<tr>
<th>ITINERARY FOR WHO IS TRAVELLING</th>
</tr>
</thead>
<tbody>
<tr>
<td>THE PURPOSE OF THE TRIP</td>
</tr>
<tr>
<td>THE DATES OF TRAVEL</td>
</tr>
<tr>
<td>TIME</td>
</tr>
<tr>
<td>---------------------------------</td>
</tr>
<tr>
<td>ALWAYS PRESENTED IN 24 HOUR CLOCK</td>
</tr>
</tbody>
</table>
Methods of Payment

• There are many payments required during a business trip:
  • Travel
  • Accommodation
  • Food
  • Other expenses: petrol (for hired car); sightseeing; taxis from Hotel to meeting place etc.

• The different methods of payment available are:
  • Currency.
  • Traveller’s cheques.
  • Credit cards.
Methods of Payment - Currency

• The Admin Assistant must ensure that the employee has some local currency when travelling to pay for any emergencies eg a taxi.

• The Admin Assistant can use the Internet to check the exchange rate to find out the value of the local currency.

• It is important that the employee does not carry a lot of cash in case his/her wallet gets stolen or lost.
Methods of Payment – Travellers’ Cheques

- Traveller’s cheques are a more secure method of payment as only the employee is able to “cash” them.

- The employee is required to sign the traveller’s cheques when he/she receives them and whenever money is required the employee takes the travellers’ cheques to a suitable vendor and signs the amount of money he/she wishes to withdraw.

- This is an excellent method of payment as the employee can decide how much money he/she has with him/her at any given time.

- If the employee loses the traveller’s cheques, he/she can easily replace them as long as he/she has the serial number of each travellers’ cheque – this will confirm that they belonged to the employee.
Methods of Payment – Credit Card

• The purpose of a cheque is that goods can be bought now and paid for at a later date.

• A credit card enables the employee to pay for goods and services and at the end of the month he/she receives a statement showing how much they are due to pay.

• The employee can decide to pay the amount in full or carry over the debt to another month.

• Many places around the world enable people to use credit cards in the automated machines “in the wall” which makes it easy for cash withdrawals to be made.
Expense Claim Forms

• The employee is entitled to claim back money that he/she spent for business reasons during the trip. For example:
  • Taking a client out for dinner.
  • Taxi costs from the Hotel to the Airport.

• In order to claim back the money spent, the employee is required to complete an expense claim form. The following information must be shown:
  • Personal details.
  • Details of the business trip: dates; purpose etc.
  • The exact cost of each expenditure.

• It is important that the employee can provide the Finance Department with all receipts so that costs can be verified.