



UNIT-4

Travel Arrangements

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ The benefits of using a travel agent?
- ✓ Advantages and disadvantages of business travel by plane.
- ✓ List the information the PA/secretary needs to gather before making travel agents.

Unit 4

Travel Arrangements

Today's Business Traveler

In today's competitive market, companies routinely buy and sell products and services both across the country and around the world. Because of this situation, business-related travel is common to every type and every size of company.

A small business just getting under way may have interest only in local markets; however, as the business grows and expands, a larger domestic market and possibly international markets will be of greater interest. Thus, as a business grows and an owner's needs increase, your administrative duties will include keeping abreast of how to handle your employer's travel needs quickly and efficiently, no matter how far he or she goes.

Even if you work for a larger company that has an in-house travel department, it's useful to know the following procedures to troubleshoot for your boss when needed.

Getting the Trip Under Way

Your main purpose in making travel arrangements is to get your boss to his or her destination and back home again as smoothly as possible. Speed and cost may be other considerations. If you are a new administrative assistant or new to a particular office, see what the policies and precedents are for making travel arrangements. You may find helpful information in the files. There may even be a step-by-step procedures manual to consult, or you may find a special intranet Web page that contains travel information. If such information is not readily available, ask your boss whether to use a travel agency or to make the arrangements without an agent.

Whether you're going to do it yourself or are collecting information for the travel agent, be sure to determine the following basics:

- Ñ What is the purpose of the trip?
- Ñ What are the desired departure and return times and dates?
- Ñ What is the point-by-point itinerary?
- Ñ Will the boss be traveling alone, or will other staff members or family members be traveling along?
- Ñ What type of transportation does your boss desire?
- Ñ What is the best means of transportation available at that particular destination?
- Ñ If you're not sure, a travel agent may help you with some of this information even if arrangements are ultimately not made through the agency.

- Ñ What is the lodging facility closest to the activities of the trip? If your boss's appointments are scattered throughout the city, perhaps a downtown hotel or an airport hotel or motel would be preferred.

If your employer travels frequently, you should use the Official Airline Guide (OAG), which is available on the Internet at www.oag.com. It includes both domestic and international flight information, hotels, maps, and other useful travel information.

Many employers ask administrative assistants to arrange travel services and not use a travel agent. If this is the case, first have your boss confirm basic departure and return times and dates, and then proceed to make the reservations.

Hotel Reservations

If the meeting is in a major city, make the lodging reservations without delay because city hotels are often fully booked weeks in advance. State your employer's name, office or home address, telephone number, type of accommodation preferred (single room, two-bedroom suite, etc.), plus your own name as the contact person. Ask for written confirmation, which your boss should carry when traveling in case he or she arrives only to be told that no such reservation exists.

Some hotels also make airport shuttle or limousine reservations. If your boss needs either of these, make a reservation now. Have the date and the exact time of day the shuttle or limousine is needed, and give that information to the hotel reservation person. Again, ask for written confirmation to be mailed, faxed, or emailed to you with the room reservation information.

Hotels hold room reservations only until a specific deadline, typically 6 p.m. You can extend the reservation beyond that time limit by guaranteeing payment whether or not the boss arrives. To do this, you must give the hotel reservation person a credit card number. Remember that if the boss changes his or her mind about making the trip or staying at that hotel, the room charge will have to be paid anyway, since you've guaranteed arrival. However, most hotels and motels will allow you to cancel a guaranteed reservation without charge if you cancel before 6 p.m. on the day of arrival.

What if you aren't able to make a reservation in the hotel of your boss's choice? You may be able to use a travel agency for this service alone. Large travel agencies often have a number of hotel and motel rooms blocked and held exclusively for them, a practice especially common at conventions. Select an agency that's very large, perhaps choosing on the basis of telephone classified ads if you don't have a personal recommendation. Call and explain your problem. The travel agent will usually be eager to assist you, with the hope you'll eventually become a regular client.

All of this presumes you know which hotel to choose. If your boss is traveling to a city he or she has never visited before or is going to a convention that does not recommend a particular hotel, investigate your choices using the Internet. You may also write to the convention bureau or chamber of commerce in that city or secure a local newspaper, both of which can provide much valuable information. If your boss has a favorite hotel chain, you can call the national reservations

center for the chain or go to its website and find out if they have a hotel in the city your boss will be visiting. You can then make reservations using the national reservations center or website.

Transportation Reservations

Airline

Call the preferred airline's reservation office by consulting your telephone directory for a toll-free 800 number. If you're unable to find one, call 800 telephone information at 800-555-1212.

As soon as you're in touch with the airline, you can instantly make a reservation and usually secure a preferred seat and/or car reservations as well. Advise the reservations agent of the company's or employer's credit card number and whether the ticket and reservations information should be electronic, mailed, or held for pickup.

You can also make reservations with the airline on the Internet by going to its website. Airline reservations made on the website may be less expensive than those made by phone.

The following is a list of major airlines:

- | | |
|------------------------------------|---------------------------------|
| Ñ Aer Lingus | Ñ El Al |
| Ñ Aeromexico | Ñ EVA Airways |
| Ñ Air Canada | Ñ Finnair |
| Ñ Air China | Ñ Frontier Airlines |
| Ñ Air France | Ñ Hawaiian Airlines |
| Ñ Air Jamaica | Ñ Iberia |
| Ñ Air New Zealand | Ñ Icelandair |
| Ñ AirTran Airways | Ñ Japan Airlines |
| Ñ Alaska Airlines | Ñ KLM |
| Ñ Alitalia | Ñ Korean Air |
| Ñ All Nippon Airway | Ñ Lan Chile |
| Ñ America West | Ñ LOT Polish Airlines |
| Ñ American Airlines | Ñ Lufthansa |
| Ñ Asiana Airlines | Ñ Malaysia Airlines |
| Ñ ATA | Ñ Mexicana |
| Ñ Austrian Airlines | Ñ Midwest Express |
| Ñ BMI British Midland | Ñ Northwest |
| Ñ British Airways | Ñ Qantas Airways |
| Ñ Cathay Pacific | Ñ SAS |
| Ñ China Airlines | Ñ Southwest Airlines |
| Ñ Continental (merged with United) | Ñ Spirit Airlines |
| Ñ Delta | Ñ Swiss International Air Lines |

Ñ Thai Air International
Ñ United

Ñ US Airways

Electronic Tickets Electronic tickets, or e-tickets, allow travel without a paper ticket. An e-ticket confirms your airline ticket purchase without requiring a paper record. The only record of an e-ticket sale is in electronic form in the airline's computer system. Many airlines prefer e-tickets and charge extra for issuing paper tickets. Most air-lines also allow you to check in for a flight 24 hours in advance and then print a copy of the eticket.

Airport security and airline check-in locations require you to provide a government-issued photo ID, such as a driver's license. (The name on the ticket must match the name on the ID) For international travel, a passport may be needed as identification. In addition, when flying on an e-ticket, you must have a printed copy indicating a flight departure for the current date.

This information is required in order to enter the secured area beyond the security screening checkpoint. Passengers who do not need to check baggage and already have an approved document (outlined above) may proceed through the security check-point directly to the departure gate.

Some employers require paper receipts for business travel expense reports. Some companies accept printouts of confirmation emails, but check your company's policy to find out what is acceptable documentation.

Train

In days gone by, rail travel was the way to go, with comfortable Pullman compartments and dining cars with fine food graciously served. But today, with time being money, more and more executives prefer air travel. Still, there are executives who either prefer not to fly or genuinely enjoy leisurely travel such as that provided by Amtrak. Railway travel is usually done when there is adequate time and easy access to rail terminals.

If your employer prefers rail travel, obtain a schedule for Amtrak trains as well as for commuter lines and connecting lines from the nearest rail station or at the Amtrak website at www.amtrak.com. A call to Amtrak at 800-USA-RAIL (800-872-7245) will also answer your questions.

Automobile

Call the preferred car rental company's reservation office by consulting your telephone directory for a toll-free 800 number. If you're unable to find one, call 800 telephone information at 800-555-1212. Many car rental companies have frequent-renter programs that speed up the rental process both when making reservations and when picking up a car. Check with your employer to find out

which car rental company is preferred and whether or not he or she has a frequent-renter membership. The following is a list of the major car rental companies:

- | | |
|-------------|--------------|
| Ñ Advantage | Ñ Enterprise |
| Ñ Alamo | Ñ Fox |
| Ñ Avis | Ñ Hertz |
| Ñ Budget | Ñ National |
| Ñ Dollar | Ñ Payless |
| Ñ Thrifty | |

Car rentals are handled much the same way as hotel reservations. You'll need to provide a credit card and driver's license in order to guarantee the reservation. You will also need to know the following in order to make a car rental reservation:

- Ñ City
- Ñ Specific rental location in the city
- Ñ Car pick-up time
- Ñ Car drop-off time
- Ñ Car class

Check with your employer to determine the car class. A variety of car classes are available for rental including:

- | | |
|-------------|--------------------------------|
| Ñ Economy | Ñ Premium |
| Ñ Compact | Ñ Luxury |
| Ñ Midsize | Ñ Convertible |
| Ñ Standard | Ñ Mini-van |
| Ñ Full size | Ñ Sports utility vehicle (SUV) |

Using a Web-Based Travel Service. You can book travel yourself using a Web-based travel service such as Priceline, Orbitz, Travelocity, or Expedia.com. These Web-based travel services will allow you to make both personal and business travel reservations for airlines, hotels, car rentals, cruises, and other vacation packages.

With a Web-based travel service, you can create a traveler profile for your employer, so that his or her personal preferences regarding airline seats, hotels, car rental agencies, hotel rooms, and so forth are stored for all future trips. You can also instantly create an itinerary that can be printed on your computer's printer. In addition, you can print maps and driving directions.

Using a Travel Agency

A good travel agency is invaluable to the busy administrative assistant. Few other outside services provide more time-saving help. A competent agency can provide a host of services. It can: recommend hotels and make reservations; make airline, ship, and rail reservations; take advantage of special fares you may not be aware of; issue tickets; make car rental reservations; assist in securing passports and visas; provide tickets to shows, the theater, sporting events, or a special event occurring in one or more of the cities on the itinerary; and mail all these tickets and reservation information directly to you.

Usually, travel agencies do not charge your company a fee for making these reservations since their commissions are paid directly by the hotels; however, some do add a small surcharge for airline tickets. A charge may also be made for rail reservations, unless the reservation is part of a prearranged package tour. Refunds for any unused tickets can also be obtained by the agency. In addition, a travel agency can often help solve problems that occur during your employer's stay. Even small agencies often have a toll-free 800 number, making it convenient for either you or the boss to call from anywhere.

After you've compiled an itinerary for your boss and know his or her exact travel needs and desires, a telephone call to a travel agency may be all that's needed. This will save you an incredible amount of time from the moment your employer leaves home or the office to the time of return.

Finding a Reputable Agent

To find a reputable travel agent, ask administrative assistants in other companies or your own company for a recommendation, or obtain a list of agencies from the following professional organization:

American Society of Travel Agents
1101 King Street, Suite 200
Alexandria, VA 22314
TEL: 703-739-2782
FAX: 703-684-8319
www.asta.org

Many good and reputable agents do not belong to this society, so do not discount a recommended agency simply because it's not a member. If you need further sources of agencies, consult your classified telephone directory. If you wish, ask if the agency can give you the name of one or more business clients as references.

Once you've found a good travel agent, use that same person whenever possible every time your employer travels. The agent will soon become familiar with your boss's travel habits and travel

needs, making it easier to arrange trips. A rapport between you and the agent will be to your employer's advantage and perhaps to your own when your own vacation time comes around.

Making the Arrangements

To establish a good relationship among you, your employer, and your travel agent, always have all the facts ready when you call. If you're not sure what your employer needs, you cannot expect the agent to know. But once you do have complete information, the agent can begin to find the best schedules, the best fares, and the best hotels and hotel rates. The facts you should have ready for the agent include:

- Ñ Your name and the traveler's name
- Ñ The traveler's office address and office telephone number
- Ñ Date and time of departure and of return
- Ñ The traveler's preferences: specific carrier, if desired; general time of departure, such as early morning or evening; general time of return; and type of service desired, such as first-class, coach, and smoking or nonsmoking
- Ñ The traveler's home telephone number and cell phone number
- Ñ The traveler's frequent flyer number(s)
- Ñ Your home telephone number and cell phone number (in case an emergency should arise, such as a change in return-flight time or a return-flight cancellation, and the boss needs to be notified while away)
- Ñ The traveler's email address
- Ñ Your email address in case the boss needs to be notified about something while away.

Quickly and efficiently, a good travel agent will provide you with confirmation of your reservations, the advised check-in time, the travel time, and estimated time of arrival. These services may be paid for with a credit card. The airline tickets and reservation confirmation forms can be picked up or mailed to you, as you wish.

Before-the-Trip Checklist

Before leaving on a trip, you should confirm the following:

- Ñ Airline tickets and frequent flyer number
- Ñ Lodging information and confirmation number
- Ñ Car rental information and confirmation number
- Ñ Money, travelers' checks, or credit card (alert the credit card company of your intended travel, so they won't freeze your account for suspected fraud)
- Ñ Passport, visa, driver's license, or international driving permit
- Ñ Itinerary
- Ñ Destination contact names, addresses, and phone numbers
- Ñ Meeting agendas
- Ñ Speeches, reports, and presentations
- Ñ Computer or iPad
- Ñ Cell phone

International Travel

If the boss's trip involves international travel, make plans well in advance because of the many details involved. He or she should be aware of both U.S. requirements regarding foreign travel and the requirements of the country or countries to be visited. There are many conditions imposed on business travelers that are different from those imposed on tourists.

For assistance in arranging an international business trip, you can contact the U.S. Department of State at www.travel.state.gov. You can also visit the U.S. Department of Commerce website at www.commerce.gov.

Using a Travel Agent for International Travel

Even if you do not use a travel agency to arrange domestic business trips, it's highly recommended that a reliable agency be used for international travel. To select a travel agency, solicit recommendations from coworkers or friends, consult the classified section of your telephone directory, or look for advertisements in the newspaper that indicate an agency is not only well versed in foreign travel rules and regulations but also specializes in individual itineraries rather than package tours.

The agency will handle all of the complicated details involved in foreign travel. Its expertise will be invaluable to you, and at little or no cost to your company since the travel agent's fee will be paid by the hotels.

The agency will handle all arrangements for transportation, lodging, car rentals, even sightseeing excursions. It will furnish accurate information about the documents needed for each particular country—passport, health certificates, police certificates, visas, and so forth—and exactly how to obtain each. The agency will handle all checks or arrange for letters of credit, as your employer prefers, and will even secure a small amount of currency in the denominations of the country visited so that the boss won't arrive with U.S. currency only.

Visas and Passports

Most U.S. citizens need a passport to leave the United States and to reenter it. A pass port is required by U.S. law for travel to North America, South America, Central America, the Caribbean, or Bermuda (under previous law, a passport was not required for such travel). Passports are not required for travel to U.S. territories (such as Puerto Rico). All travelers should always carry personal identification, such as a driver's license or a government-issued photo ID, which is at the least necessary to board planes.

In addition to a passport, many countries require a visa to enter. Usually, the visa must be obtained in advance and can't be purchased at the border or point of entry. Visas are issued by the individual embassies and consulates of various countries. Some countries charge a small fee, while other countries issue visas for free. Since the requirements can and do change often, even if you have obtained a visa in advance of a trip, double-check before you leave to make sure the visa is still valid.

To find out more about passports and visas, contact the U.S. Department of State at www.travel.state.gov or call 877-487-2778.

Required Immunizations and Vaccinations

Anyone traveling to a foreign country must have up-to-date information concerning required immunizations. The U.S. Department of Health and Human Services has information on required immunizations for travelers available by calling 877-FYI-TRIP (877-394-8747). You can also visit them on the Web at www.cdc.gov/travel.

Customs

When returning from foreign countries, the traveler must declare certain items acquired abroad to determine whether a tax is owed. Travelers returning home to the United States are allowed certain exemptions, which help cover the inevitable souvenirs. Articles totaling \$800 (fair retail value in the country where purchased) are duty free, except for cigarettes, cigars, and liquor.

Be aware: Travelers should not try to understate the value of an article or misrepresent the nature of any article. To do so could result in the seizure and forfeiture of the item, and the tax will still be assessed. If a traveler has doubt as to whether to declare an item, he or she should declare it and then ask the customs inspector about it. Complete and detailed information concerning customs regulations are available by visiting www.cbp.gov.

Further Reading:

- ✓ Booking Employee Travel in Concur ,
https://inside.trinity.edu/sites/inside.trinity.edu/files/file_attachments/8201/booking-travel-concur-pdf.pdf
- ✓ Travel,
https://ngl.cengage.com/assets/downloads/life_pro0000000047/sample_unit_9_life_beginner.pdf