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Guide to Writing a Travel Policy for your Business

Putting it in writing helps rein in costs and maximize vendor benefits

By [Betty W. Stark](#)

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You've got a hot product, you've hired a couple of sales superstars and they're ready to hit the road. But wait! Before they head to the airport, you need to spell out how you want them to travel and how much they're authorized to spend.

Think a written travel policy is an unnecessary exercise? Better to do it when your business is small than to wrestle an 800-pound gorilla later. A brief, well-crafted travel policy can help:

1. Make it clear to your traveling staff how, when and why you want them to travel
2. Build vendor loyalties that can earn discounts from airlines, hotel chains and car rental companies
3. Get a handle on travel expenditures early on.

Action Steps

The best contacts and resources to help you get it done

Understand what goes in to a travel policy.

You want your travel program to reflect your corporate culture, but how do you go about that? Seek out examples of existing policies from other companies, your travel agency, or other members of your professional organizations.

I recommend: Check the internet for [articles](#) that advise what to include in a policy and for a [sample policy](#) that you can customize to your own needs.

Check tax and government guidelines for allowable travel expenses.

Use this information as a guideline when developing your policy.

I recommend: The Internal Revenue Service spells out allowable travel expense deductions in [Publication 463](#). The U.S. General Services Administration lists guidelines for [domestic](#) and [foreign](#) per diems (scroll down to access rates chart. This information is also available in an Excel format at this website.)

You decide: Book with a traditional travel agency.

Choose a "bricks and mortar" agency that specializes in business travel and has the technology to monitor and report on travel patterns.

Uncommonly
Useful
9.0
out of 10

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I recommend: Look for a business travel-savvy agency with professional credentials like membership in [ASTA](#) (American Society of Travel Agents), [NBTA](#) (National Business Travelers Association) or [ARTA](#) (American Retail Travel Agencies). Use the internet to [search for an agent](#).

✔ You decide: Book on the internet.

Flexibility and convenience are a plus. It can be fast but there can be a downside: if there's a problem or you need to make a change, it might be difficult or impossible.

I recommend: [Airline websites](#) sometimes offer lower fares and "specials" not available through other outlets. Booking sites like [Expedia](#), [Travelocity](#) and [Orbitz](#) offer comprehensive programs for business travelers.

✔ Put the policy pieces together.

You've considered the pros and cons. You're ready to write the policy, monitor your travel budget and evaluate efficiencies.

I recommend: Use the internet to find [travel policy templates](#), [travel and entertainment expense reporting programs](#), and [tools to analyze your policy effectiveness](#).

Tips & Tactics

Helpful advice for making the most of this Guide

- Avoid policy-making by committee. Assign the task to a senior staff member who is knowledgeable about business travel but who has no personal agenda.
- Solicit input from travelers, travel arrangers, the finance department and senior management.
- Spell out the approval process for trips.
- The policy MUST: 1) be distributed to all current and new employees, 2) be endorsed 100% by senior management, and 3) be regularly monitored for compliance.
- If travel schedule changes are common, think twice about booking on the internet. It could be costly – or impossible to rebook.
- Pick the credit card that maximizes free-and-discounted benefits.
- Look into airline "soft dollar" programs for businesses, hotel frequency discounts, and business-friendly car rental programs.

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www.expensewire.com

[DATABASICS, Inc.: Travel Expense Reporting Software](#)



Recommended Solution Providers

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[Atlas Travel: Business Travel Policy Management](#)

Provides business travel policy management services.

[Concur Technologies: Travel Management Solutions](#)

Provides travel management software to assist in business travel policy management.

[Absolute HR Solutions: Pre-Written Policy Solutions](#)

Offers pre-written human resource policies, including travel policies.

[Personnel Policy Service: Writing Travel Policy Guide](#)

Offers a kit for writing business travel policy.



Best Sites to Learn More

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[WesTrav: Sample Travel Policy](#)

A sample travel policy to act as a guide to writing a business travel policy.

[AllBusiness: Business Travel Policy](#)

In-depth analysis of developing a business travel policy.



Best Blogs and Forums

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[Inc.com: Business Travel Forum](#)

Discussion of business travel issues, including business travel policy.

[Personnel Policy Service: Writing Travel Policy Guide](#)

Offers a kit for writing business travel policy.



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