

Plans change. Your travel program shouldn't panic.

The proactive business travel checklist



From last-minute changes to unexpected disruptions, today's travel programs need to be built for flexibility. Use this checklist to evaluate how prepared your program is, spot opportunities for improvement, and ensure your team can navigate uncertainty with confidence.

Pre-Booking Planning

Reduce last-minute chaos before it starts

- Book travel as early as possible to secure better pricing and availability
- Collect complete traveler profiles (preferences, emergency contacts, accessibility needs)
- Build buffer time into itineraries for delays, transfers, and recovery
- Prioritize hotels close to meeting venues to reduce transit risk and fatigue
- Pre-assign seats, upgrades, and add-ons to minimize day-of disruptions
- Ensure loyalty programs are attached to reservations to improve traveler experience during rebooking

Destination & Timing Intelligence

Know what travelers are walking into

- Check for major events (conferences, festivals, sporting events) impacting availability and pricing
- Review local public holidays and business closures
- Flag major construction projects or transportation disruptions
- Identify peak tourism seasons that may affect crowding and costs

Risk Assessment & Duty of Care

Protect your people

- Review seasonal weather risks (storms, hurricanes, winter conditions)
- Check government safety advisories and geopolitical risks
- Review health requirements (vaccinations, disease outbreaks, entry rules)
- Assess regional natural disaster risks and emergency response readiness
- Confirm travelers can be located and contacted at all times

Policy, Compliance & Governance

Make sure your policy works in the real world

- Audit travel policy at least annually — or after major disruptions
- Re-evaluate spending thresholds during volatile pricing periods
- Confirm preferred suppliers still meet service and flexibility needs
- Ensure policy clearly defines traveler responsibilities and exceptions
- Verify passport validity (6+ months), visas, and work permits
- Review travel insurance coverage for disruptions, medical care, and evacuation

Traveler Education & Communication

Prepared travelers make fewer emergency requests

- Share complete itineraries with travelers and emergency contacts
- Provide destination-specific safety and cultural briefings
- Distribute local emergency numbers and embassy details
- Ensure travelers know how to access 24/7 support
- Provide clear instructions for using booking tools and mobile apps
- Communicate expense and reimbursement expectations upfront

Booking Strategy for Uncertainty

Flexibility first — always

- Favor refundable or changeable airfares when uncertainty exists
- Book hotels with flexible cancellation policies
- Allow sufficient connection times (90+ min domestic, 2+ hrs international)
- Avoid first and last flights of the day when possible
- Prioritize direct flights to reduce missed connection risk

Technology & Tools

Visibility beats guesswork

- Use booking tools with real-time availability and alerts
- Enable mobile check-in and digital boarding passes
- Activate traveler tracking and reporting tools
- Ensure travelers have app access before departure
- Monitor trips centrally for proactive intervention

Monitoring & Contingency Planning

Expect disruption — plan for it

- Enable flight, weather, and security alerts
- Monitor geopolitical and health advisories
- Pre-identify alternative flights, routes, and hotels
- Document rebooking rights and airline policies
- Establish a clear communication chain for delays
- Brief travelers on vouchers, accommodations, and entitlements

Cost Management During Uncertainty

Control spend without compromising safety

- Budget for seasonal and disruption-driven price fluctuations
- Set clear guidelines for emergency spending
- Track expenses and compliance monthly
- Identify cost-saving opportunities without increasing risk
- Benchmark program performance against industry standards

Post-Trip Review & Continuous Improvement

Learn once. Improve forever.

- Collect traveler feedback after trips
- Review disruption handling and response times
- Identify policy or process gaps exposed by issues
- Update playbooks and training accordingly
- Share best practices across teams

Want help building a proactive travel program?

Our experts can help you prepare for uncertainty before it disrupts your people or your business.



BOOK A MEETING