

So We Know It Is A Problem - But How Do You Implement A Programme To Manage Your Business Travellers?

There have been numerous articles in the trade press during the past year – this author included – discussing the risks associated with short-term business travellers. As we sit in the Global HR or Mobility world the focus of such articles has usually been around the Taxation, Immigration and Duty of Care Elements.

So if we decide that this is a real business problem – how do we go about creating a business case to implement such a project?

Is it too hard? Maybe not

Let's look at all of the potential stakeholders that can be impacted by a single travel event – and who, as a result should be part of your internal task force team to deliver the project. Each internal team member can interact with the output of data driven by a business travel event.

With so many internal stakeholders to satisfy – each with varying degrees of influence in an organisation, it is easy to understand why it is sometimes seen as hard to achieve.

Each of these company functions should have a vested interest in securing data from a managed business traveller programme, so you should recruit a member from each unit as you build your business case.

Here are my tips to successfully implement a business traveller management programme:

1) There is only one constant in a business travel event – focus on the traveller first

In many companies there are fragmented approaches to managing business travellers. Larger companies have Travel Management teams focused on the booking of travel and the resulting spend levels. Smaller companies allow travellers to book directly with suppliers and set guidelines on the class of travel, level of accommodation etc. The only constant in a business travel event is the business traveller and their smartphone. If you want to manage business travel you should look to maximise this single consistent data source.

2) Don't be afraid to rely on the business traveller

One of the most surprising elements I have encountered in talking with countless customers over the last 12 months is their reluctance to involve the traveller or to rely on them to complete processes. This is unusual as we expect travellers to download internal forms or use travel booking engines. If we analyse the output of travel booking engines to monitor compliance – how did that data get there if not from the traveller themselves?

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Many travel industry reports indicate the wishes of travellers to access company processes via a mobile app rather than internal forms or emails (*Business Travel News – Mobile disconnections in the age of smartphones and travel apps*).

Instead of completing complex and repetitive internal form processes you should look to hand your travellers an App / Mobile solution. You equip them with a mobile



phone, travel insurance, roaming data plans – why not add one more piece of kit for their international travels.

The upcoming millennial generation has always had a smartphone in their hand and even the most Luddite of older business travellers are coming around to the use of apps like uber and skyscanner to facilitate their international travel.

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A critical feature in implementing a short-term business travel programme is to impress on the traveller that the taxation or immigration impacts are personal. If a traveller is refused entry or is temporarily suspended from entering a country for a visa infraction – it is the traveller's personal passport and identity that sits on the Immigration system. If that traveller leaves the company, the infraction goes with them – it is not expunged when he or she starts to work with a new company. All tax returns are signed individually by a traveller and a tax liability could arise many years after the travel event, so having accurate information can help

to fight off a tax demand or audit.

Communicating this accurately at implementation will drive far greater adoption of the programme. Business travellers use on average 16 Apps (Travelport - The Future of Apps) while travelling, so there is ample room for adoption of your smartphone driven programme.

To feed the multiple stakeholder requirements above we need to be able to give them the data they need.

3) The Data is there somewhere

If we are focusing on the traveller then we can use his or her input via smartphone apps to collect the trip data. If travel or expense processes are embedded in a company there is often a reluctance by Mobility professionals to disrupt those processes with the travel or finance teams.

In many companies there is an established travel approval and management process. The difficulty for Global Mobility teams is that 'compliance' for travel managers has an entirely different meaning than for mobility managers.

Travel Managers are almost entirely focused on the cost element of the trip or the use of approved suppliers. 'Compliance' means – are you booking Marriott when you should be booking Hilton?

There is almost never a focus on the downstream impacts of the trip on Taxation or Immigration Compliance.

Travel Managers that have a managed travel programme do cover the Duty of Care elements very well, but the Global Business Travel Association will report that only 40% of companies have a managed travel programme.

If your company has a strong travel management function, work with them to maximise the data they hold within their systems to achieve your requirements.

The data necessary to drive taxation and immigration compliance is usually held within these systems. The ability to create API data links with systems like Concur, or for instance, CWT's or HRG's travel booking tool, is quite simple. Re-using this data and directing it to a Tax or Immigration rules engine will remove some of the internal conflicts that can arise when trying to implement short-term business traveller management programmes. By working with your travel or expense colleagues, Mobility can quickly and easily source the data needed to focus on tax or immigration compliance. It is your data after all.

4) Seek budget from the multiple stakeholders or resources

Mobility teams are more used to taking cost out of programmes rather than adding cost for a new initiative. Mobilise your internal colleagues and secure elements of their budget to fund the data that can flow back to their units and better help them with their compliance obligations.

Payroll, Finance and Tax units usually command more power when new projects

are commissioned, so look to secure that budget to assist with the programme rollout. The elusive ROI can be achieved when you are measuring benefits across multiple business units – all coming, remember, from a single travel event. A project is more likely to be approved if five or six stakeholders are arguing for it at the commencement stage.

Many companies employ temps to manage manual reporting – parsing travel system outputs or sign in and out sheets to determine who is where. Free up this resource by implementing a technology solution – preferably one with a final fixed cost to allow for budgeting. If the final fixed cost is less than those two temps, then there is a win win for everyone. Projects that have a fuzzy final cost can be difficult to approve.

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5) Raise the stature of the mobility team

Many Mobility teams are reactive to the downstream tax or immigration impacts of short-term business travel. Far too often they are called in to resolve difficulties after the transgression has occurred. By implementing a real time programme – either with smartphone input by the traveller or by using travel agency data, the mobility teams can either prevent or provide timely advice in how to manage visa, withholding or Permanent Establishment issues. Mobility teams can easily move to becoming better internal suppliers to their lines of business by reacting in advance to potential tax and immigration risks. Many commentators are advocating for Mobility to take a place at the strategic table, and this could be one component in raising the stature of the mobility team at the strategic table.

So why should we do this NOW?

Perfect storm

There is a perfect storm approaching in the Tax, Immigration and Duty of Care environments. This is a critical catalyst in mobilising the internal team necessary to deliver a company wide business traveller management programme.

Global tax rule changes sparked by the OECD Base Erosion and Profit Shifting Project, and the renewed focus by the EU and other jurisdictions seeking to tax corporates in the markets where they create value, have brought a significant focus on needing to know where your people are – and what they are doing in that jurisdiction.

The Trump administration focus on immigration and the future implications of Brexit means there is greater scrutiny on business travellers entering jurisdictions to ensure they are travelling on the correct visa for the type of activity the traveller is carrying out. Maverick travellers that push the limits of Visa Exemptions can be brought into line by implementing a business traveller programme under this new geo-political environment. The opportunity to introduce Pre-Trip assessment will be better received in this new world as even the most maverick of business travellers do not want to be refused entry or detained. The 'we have always done it that way' excuse can become a thing of the past.

The global security situation and the increase in intensity of natural disaster and

extreme weather events has also brought a focus on being able to locate travellers in case of emergency. Resistance to being tracked fades when a traveller needs your help.

If you wish to get internal buy in to implementing a new business traveller programme, then you should maximise the confluence of these three critical events and assemble the task force of internal stakeholders we mentioned above.

So let's summarise.....

Do you agree there is a business problem?

It may not be as hard as you think to take control of the problem – but you must take control.

- Involve the traveller and use smartphone technology to collect data or merge it with existing travel or expense data
- Expand the focus of the project by mobilising the other internal stakeholders affected by business travel events. Support their requirements with the accrued data
- Use the project to raise the stature of the mobility team and take them to a greater advisory role
- Harness the upcoming Perfect Storm to mobilise your team.

So now is the time to start implementing. There are many service providers and technology solutions on the market that can help you manage your programme. Targeted solutions like BDO's QuickTrip, Weichert's

Global Organizer, Altair's Orbit Platform, Orion Mobility's GEM Business Traveller solution or the GT Global Tracker, are just a few examples of the available service providers concentrating on supporting global businesses in managing their business travel programmes.

Managing business travellers has always been a problem – events are taking place that will make it more of a problem if you don't implement a robust programme soon.

Best of luck in managing your programme and if you have any questions please don't hesitate to contact me.

It's not as hard as you think.



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