

## KEEPING A SEAT AT THE TABLE: Aligning Travel with New Strategic Initiatives

**B**usiness disruptions engendered by the global pandemic over the last two years fundamentally altered business travel while also elevating the role and visibility of travel managers within their organizations.

At the beginning of the pandemic, travel managers abruptly found themselves called on to advise senior leadership about employee safety in the midst of rapidly changing guidance and restrictions affecting domestic and international travel.

Over the following months, they implemented new technologies to enable virtual and hybrid meetings to keep employees, leadership, and customers connected. Many were also called to the decision-making table—sometimes for the first time—to provide strategic input on how travel could support organizational goals around continuity of business, and now, the role of travel in rebuilding business.

While all of that is still playing out in real time, the collective impacts of the pandemic on business and business travel upended the traditional role of travel managers, shifting the focus from a primarily procurement-led position with a heavy emphasis on cost savings and transactional components to a more strategic and advisory position.

Now the focus for many is keeping that seat at the executive table in navigating the dramatic transformation reshaping how, where, when and why people work.<sup>1</sup> Gartner human resource researchers describe the collective impact of the changes as “the greatest workplace disruption in generations.”<sup>2</sup> Grasping shifts in their own organizations, travel managers must identify new ways that travel can support business growth, culture or its transformation. How can travel align with new strategic initiatives or even be a conduit to spur growth? **This report explores key strategic functions travel managers need to emphasize to capitalize on this historic opportunity.**

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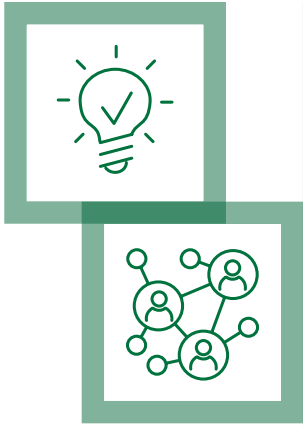
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<sup>1</sup> *“Future of Work Trends in 2022,” Korn Ferry*

<sup>2</sup> *“11 Trends that Will Shape Work in 2022 and Beyond,” Gartner HR practice authors Brian Kropp and Emily Rose McRae, Harvard Business Review, Jan. 13, 2022*



## RECOGNIZING THE OPPORTUNITIES

“Travel managers are being presented with an opportunity to be more strategic and to have their role elevated,” said Katie Virtue, client solutions lead with Festive Road consulting firm. “That started during the pandemic when there was a heightened view of travel, but now you have leadership within organizations looking at the value of travel as it returns. There is an opportunity for travel managers to showcase that travel can be viewed more as an investment versus the cost focus we have traditionally seen.”

More than half of travel managers in a recent [BTN survey](#) said they now have more opportunity and many said their core work has been more recognized for its business enablement and the richness of the data and reporting they can provide to CEOs, risk managers and business leads.

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— *Katie Virtue, Festive Road*

“The pandemic really made me realize that my role couldn’t continue if I only thought about my goal as ‘return-to-travel,’” said Ann Dery, director of global travel and meetings for S&P Global. “I realized that I needed to reinvent travel at S&P Global and pivot my role to become a much more strategic stakeholder within the organization.”

Now, with remote and hybrid workplace patterns firmly entrenched, and a heightened corporate focus on employee wellbeing, diversity, inclusion, and environmental sustainability, “travel managers have the opportunity to work with other business leaders in the organization to understand the overall strategic objectives of the company and see how they can serve a purpose in that,” she added.

## KEY STRATEGIC FUNCTIONS AND SKILL SETS

As travel managers take on a more strategic role within their organizations, there are several key functions and skill sets that are foundational to success.

### Collaboration and Communication

The focus on collaboration and communication across stakeholders heightened significantly during the last two years. As noted in a recent [Egencia report](#) on the evolving role of travel managers, “Finance, human resources, legal, procurement, and other key stakeholders in travel-related decisions are now involved in rewriting the rulebooks for both current and post-pandemic travel.”

Many have also seen their role in communicating with employees expand. In holding sessions to remind travelers of existing policies, Richard Eades, global category manager of travel, meetings and events for BP, said he has become an “ambassador of sorts” to help employees overcome concerns as they get back on the road.

“It’s very emotive, very focused on what’s in it for me, whether it’s loyalty points on their cards all the way through to why we are not putting that favorite hotel on our program anymore because it failed our health and safety audit,” Eades said. “We don’t have a bureaucratic, red-tape culture. We want employees to want to use the program as a choice, rather than being told to use it.”

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— *Ann Dery, S&P Global*

“Travel managers have become the curators of the experience that people have when they travel, when they are interacting with peers all over the world, or when they are meeting colleagues in person for the first time.”

— Hansini Sharma, Acquis Consulting



Eades said part of his role now is “relationship building to really engage with stakeholders. It’s a very demanding role but it can be very rewarding.”

Other travel managers are also noting how they’re spending more time retraining and even “hand-holding” frequent and infrequent travelers as they return to the road. Many also point to greater marketing and selling the benefits of the managed travel program up and down their organizations.

### Duty of Care and Employee Safety

As traveler needs around safety and security—plus physical and mental wellbeing—took center stage during the pandemic, there was a concurrent expansion of the travel manager’s role around duty of care obligations.

“It used to be that safety and security was always running behind the scenes to make sure we could find people,” said Carey Ann Pascoe, director of global travel and card management at a global entertainment technology firm. That function has pivoted to being in the forefront of our whole travel program.”

Hansini Sharma, practice lead for corporate travel with Acquis Consulting, said duty of care for travel managers is a “very natural extension of their skill set.” [Travel risk management](#) has evolved to a strategic function, whether the travel manager supports risk management or legal teams or takes the lead for the company.

### Defining Essential Business Travel

Over the last two years, many travel managers were called on to help their leadership teams define what constituted essential business travel.

“When business leaders are thinking about if it’s safe to travel, or safe to open certain offices, they are often turning to the travel manager because they can help quantify risk in ways other parts of the organization may not be able to,” Sharma said. As business travel resumes, travel managers are in a position to build on their advisory role by focusing on why travel takes place and what value it adds to their organization while helping to strategically mitigate risks.

### Curating the Employee Experience

With the establishment of virtual and hybrid meetings during the pandemic, travel managers took on a bigger and more strategic role as stewards of the employee experience.

“Travel managers have become the curators of the experience that people have when they travel, when they are interacting with peers all over the world, or when they are meeting colleagues in person for the first time,” Sharma said. “For travel managers, the opportunities here are endless. It’s a unique place that removes some of the tactical nature of the role and turns it into something really creative and strategic and immensely additive for any organization.”

### HEIGHTENED FOCUS ON ENVIRONMENTAL, SOCIAL AND GOVERNANCE

In a Harvard Business Review article, Gartner’s Brian Kropp and Emily Rose McRae identified “fairness and equity” as the first of 11 trends shaping the future of work in 2022 and beyond, describing them as, “the defining issues for organizations.” Analyzing earnings calls of S&P 500 companies, the authors noted that “the frequency with which CEOs talk about issues of equity, fairness and inclusion on these calls has increased by 658% since 2018,” according to the article.

ESG initiatives also are emerging priorities for travel managers. Whether the focus is ensuring travel accessibility to all employees, wellbeing or sustainability, travel managers are increasingly collaborating with HR, compliance and ESG leaders around workplace strategy, noted Virtue.





### Sustainability Reshapes Corporate Travel

The corporate focus on climate change, a component of ESG, and the urgent need to implement sustainable business practices, are transforming organizations and their travel programs.

In Deloitte Insight's 2022 [travel outlook report](#), about half of travel manager respondents (48%) said they are optimizing their business travel policies to support company sustainability goals and decrease the environmental impact of travel. For most, according to the report, this translates to measures like curtailing trip frequency, optimizing agendas to mitigate flying, limiting long-haul, and transitioning to more meetings online.

"What we have been doing is refreshing our policy, so sustainability comes to the forefront," said BP's Eades. "Our policy was built around safety and budget controls, and now sustainability is the third pillar we're focused on."

Eades is part of a Green Team that includes multiple categories across BP; the team has already met with major airlines and hotel groups. "We're spending a lot of time understanding what they are developing regarding sustainability and what we can collaborate on and do together. I think that's the way forward. We can't create a silo where certain areas are customized. We've got to look at industry standards to get our arms around sustainability."

Pascoe is currently revising travel policy in collaboration with the company's sustainability team. Her advice to other travel managers: Be proactive.

"Don't wait for someone to tap you on the shoulder and then fumble around figuring out what to do," Pascoe said. "Nobody said to me, 'Carey, have your plan ready next week'. I

made that plan. I heard them talking about it, I knew it was important to them, and I took the initiative to have that plan ready to present. It might get refined, but don't make someone come to you. Let them know how you think travel can contribute."

### Remote Work and Workplace Flexibility

The remote work trend unexpectedly kicked into place by the pandemic has now become a permanent fixture, accompanied by an array of potential impacts on business travel beyond the adoption of virtual and hybrid meeting technology. According to [research by Gartner](#) on transformative work trends, nearly half of employees (48%) will now work remotely at least some of the time, compared with 30% pre-pandemic.

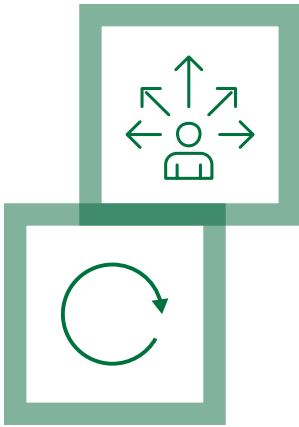
In its research report on how companies should plan for the [comeback of corporate travel](#), McKinsey & Company noted that, for many companies, the pandemic "has proven that more workplace flexibility is possible." Some 72% of executives who responded to the survey said their companies have started to adopt permanent remote-working arrangements for a subset of their employees. "These signals and others suggest that many organizations are reevaluating working and organizational arrangements," noted the report, "including when, why, and how their employees should hit the road."

In a 2022 BTN [strategy piece](#) on how travel managers can retain their seat at the table, David Reimer, EVP of global client and general manager of the Americas for American Express Global Business Travel, noted that working remotely—which for most employees includes working from home—has blurred the lines between professional and personal lives.

"That means travel and mobility become more central to traditional HR issues: employee experience, wellbeing, company culture and retention," he said. "Travel managers ready to seize the opportunity will seek to be included in key conversations across human resources, security, information security, finance, DE&I and sustainability. They will ask how their programs can align with these goals and drive success."

“Don't wait for someone to tap you on the shoulder and then fumble around figuring out what to do”

— Carey Ann Pasco, Global Travel Manager



### Reimagining the Travel Manager's Role

While there are multiple opportunities for travel managers to expand the organizational influence and visibility they gained since 2020, tactical and transactional functions will continue to be a key part of the role, particularly for small and mid-sized businesses.

"This role always balances on a fine line between strategy and tactical," Pascoe said. "You are going to get your hands dirty in the new world, too."

A look at that new world is described in an American Express and CULTIQUE [white paper](#) on how business travel is playing a central role in the future of work. The report advocates for the introduction of a Chief Journey Officer (CJO) position and corporate mindset.

"With their executive oversight and leadership, the Chief Journey Officer can reframe how the company views travel," Reimer said in the report, "no longer as a commodity but instead as an investment in long-term prosperity and culture."

### 'Don't waste the reset button'

The transformational workplace trends redefining the role of business travel in the pandemic-recovery

era means travel managers are well positioned to play a key role in shaping company culture.

"A silver lining of the pandemic is we have refocused on the qualitative aspects of the corporate travel manager's role as a driver of engagement, employee experience, and company culture," noted Sharma. "Those things have always existed, but we haven't prioritized them because we have been so numbers focused."

As leadership and business units devise new growth strategies, "there is an opportunity for travel managers to be proactive and bring travel into the conversation versus being told where the organization is headed and where travel fits in," said consultant Virtue. "You've got to be able to step back and take the time to set a strategy for travel that is tied to building back the business."

Pascoe agrees, wholeheartedly. "I don't think travel managers should sit quietly on their expertise when everything is swirling around them," she said. "There are times when supporting business goals might look one way to people who don't know travel, so you need to have a seat at the table and bring your expertise into the fold to advise how you can align travel with company goals." ●

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PRODUCED BY:

**BTNGROUP**  
CONTENT SOLUTIONS

**Diane Merlino**  
Writer

**Mary Ann McNulty**  
Executive Director, Content Solutions  
mmculty@thebtngroup.com

**Louis Magliaro**  
Executive Vice President  
& Group Publisher  
lmagliaro@thebtngroup.com

**Lindsay Straub**  
Vice President, Sales  
lstraub@thebtngroup.com

**Mariza Moreira**  
Group Design Manager

**Angelica Mundrick**  
Graphic Designer

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