

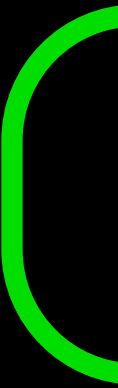
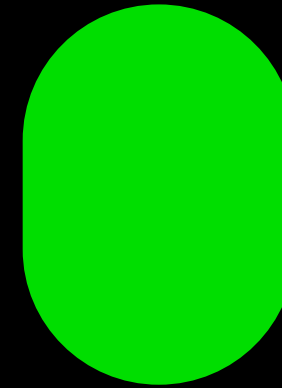


**FCM**

# **Mastering Your Approach to Agile Corporate Travel**

**Tips for Corporate Travel  
Program Flexibility,  
Adaptability, & Ingenuity**

# Contents



**01**

A note from an  
FCM agile expert

**19**

Chapter 3: So You've  
Embraced Agile...Now What?

**02**

Introduction: What is Agile?

**25**

Putting It All Together

**07**

Chapter 1: Assessing  
Your Agility

**26**

About FCM

**12**

Chapter 2: Building an  
Agile Partnership



# Hello agile newbies!

Whenever a new concept, such as Agile, is introduced to the travel industry, people immediately search for thought leaders to help guide them as they work to adopt the new concepts into their travel program. At FCM, it wasn't just about "saying" we were now agile; we wanted to reinvent ourselves as an agile partner for our customers that provides a flexible, adaptable, and industry-first agile experience, from our technology to our customer service.

Becoming agile doesn't happen all at once. It's a phased process that needs support from prepared teams and compatible partners, all who have the same enthusiasm for organizational transformation and being the alternative to the status quo. It may seem like "too much work" to build out an agile travel program when the one you currently have is already operating just fine, but if there's anything we've learned from the past few years, it's that "just fine" in times of change, chaos, or crisis just doesn't cut it anymore. But agile doesn't just prepare you for the worst – it sets you up to do cool stuff and react quickly to big changes. Yes, you can integrate a boutique mobile app into your program, dig into your data in a way you never have before, and use maintenance reviews for more than just bug fixes...with the right framework, you absolutely can find ways to change the game all the time.

Thanks for downloading this eBook. I can't wait for you to dig in and explore all the potential that an agile mindset has to offer corporate travel professionals. As you'll soon find out, the intersections between this software development methodology and corporate travel management are more obvious than you may think.

Read on!

**John Morhous**  
Chief Experience Officer, Flight Centre Travel Group

# Introduction: What is Agile?

The **Agile methodology** is a way to manage a project by breaking it up into several phases. It involves constant collaboration with stakeholders and continuous improvement at every stage. Once the work begins, teams cycle through a process of planning, executing, and evaluating.

In contrast, Waterfall methodology, which was the dominant type of project planning until Agile appeared, focuses on a **sequential development process** that flows like a waterfall through all phases of a project (analysis, design, development, and testing, for example), with each phase completely wrapping up before the next phase begins.

## Where did Agile come from?

For all its monumental effects on modern software development, Agile had humble beginnings. It was originally enshrined in a simple, single-page website titled the “Manifesto for Agile Software Development” back in 2001. Originally signed by seventeen authors, the most recent signatures have been recorded as of July 10th, 2016, and totaling in the thousands.

**“We are uncovering better ways of developing software by doing it and helping others do it.”**

MANIFESTO FOR AGILE SOFTWARE DEVELOPMENT, 2001.

Now, over two decades later, Agile is the preeminent project management and software development methodology, resulting in entire businesses and software tools being built to support this revolutionary framework. Have you used Wrike, JIRA, or Trello? Allllll Agile.





## Applying The Four Pillars of Agile to Corporate Travel Programs

“Individuals and interactions over processes and tools.  
Working software over comprehensive documentation.  
Customer collaboration over contract negotiation.  
Responding to change over following a plan.  
That is, while there is value in the items on the right,  
we value the items on the left more.”

MANIFESTO FOR AGILE SOFTWARE DEVELOPMENT, 2001.

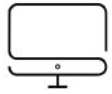
## How can software development methodology possibly apply to corporate travel?

Business travel programs, and the employees who manage them and the travelers that adhere to them, aren't made of ones and zeros. You may be surprised to hear that the similarities are closer than you think. Let's take a closer look at the four pillars of Agile.



### Individuals and interactions over processes and tools

Corporate travel programs are focused on maintaining the travel needs of people, so the focus should be on their needs and how to best serve travelers and travel managers.



### Working software over comprehensive documentation

Your travel technology should be user friendly and seamless to navigate. If something is easy to use, you shouldn't need to read a manual to understand it.



### Customer collaboration over contract negotiation

Figuring out dollars and cents is always a crucial part of a TMC and buyer relationship, but when that contract phase is focused on building a partnership and not a transactional relationship, the door is open for innovation and ingenuity.



### Responding to change over following a plan

This is critical – agile travel policies can respond to change, whether it be organizational shifts, industry evolution, or global crises, in real-time without too much of a foundational shake up. Agility implies preparedness.



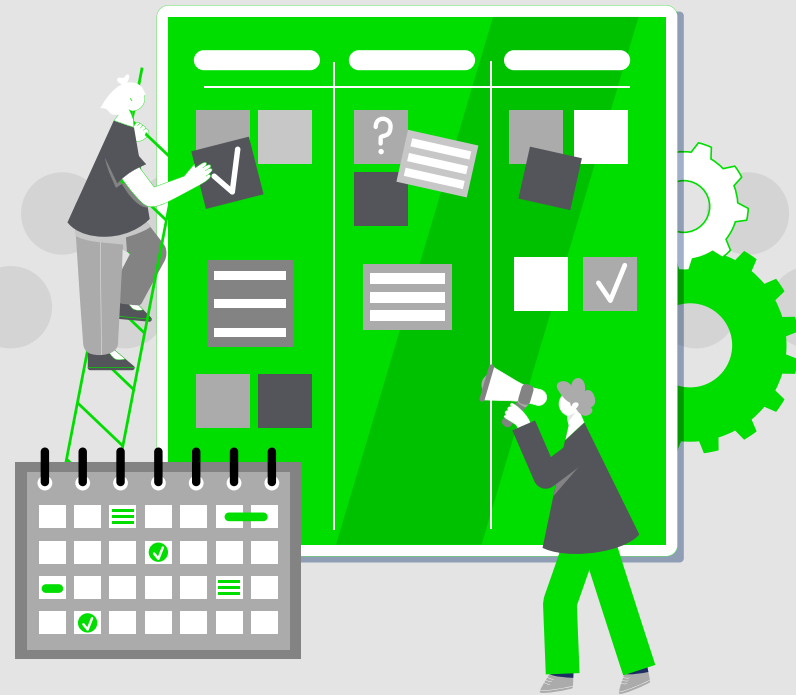
## What makes a travel program and its technology agile?

Like the Agile development methodology, agile travel programs are proactive in their planning, but nimble enough to react to changes and crises when need be. Think of Jenga vs. Legos. When you play Jenga, removing one piece can cause the whole tower to topple over, but with Legos, you can easily snap new pieces together and securely remove them without dismantling the entire structure. The same goes for agile travel programs. Agile travel technology supports this entire framework with a development schedule that is finely tuned to industry needs, and not corporate checkboxes.





# Assessing Your Agility

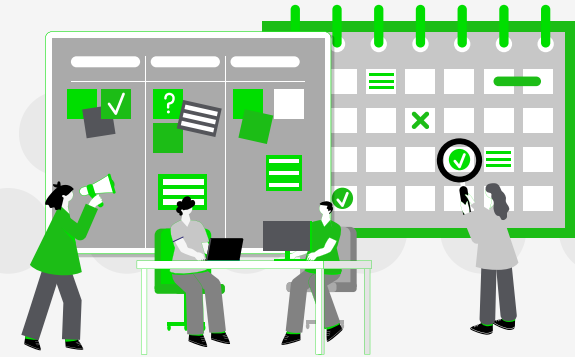


So you've decided to become agile, or at least embrace agility in your corporate travel program. However, have you considered that agility is much more than just user-friendly, seamless travel tech? Being agile is a mindset, and embracing agility takes patience, dedication, and comfort with the unknown.

Before we explore how to become agile, it's important to assess where you currently are regarding agility. If you aren't sure how to answer that question, then don't worry – we've put together a short quiz for you to get an idea.



# Assessing Your Agility



## 1. Do you know what it means to have an agile business?

- a. Yes, we are definitely agile.
- b. I think so?
- c. No, there's no way we are agile or flexible.

## 2. How prepared is your organization's travel program for rapid market and industry changes?

- a. We are extremely prepared. We do constant regression and crisis testing, review our procedures regularly, and update processes consistently.
- b. We're moderately prepared. We have the processes and technology in place to solve for major issues.
- c. We're not prepared at all. A major industry shift or crisis would cause our travel program to collapse.

## 3. How many software tools are you currently using specifically for corporate travel (OBT, expenses, risk tools, mobile apps, data & analytics, etc.)?

- a. 1-3
- b. 3-5
- c. 5 or more

## 4. When someone suggests making major changes to your TMC, vendors, tech, or processes, how do you react?

- a. It's exciting! Change is cool and leads to new opportunities.
- b. It sounds like a good idea, but it's certainly not going to be easy and may not be worth it.
- c. With our complex legacy setup? No way.

## 5. Is your current corporate travel program framework cost-efficient?

- a. Yes, we know our fee structures and vendor partnerships are optimized for cost savings.
- b. We're doing okay, but there are probably cost-saving opportunities we're missing.
- c. No, our travel program always seems to burn through money.

### Tally up your answers:

If you answered mostly A, you're pretty agile! If you answered mostly B, you still have room for improvements. If you answered mostly C, then you should definitely take a second look at your travel program and see where you can become more agile.



## Painting a Holistic Picture

You can't know where you're going if you don't define where you are. The first thing you need to do when you start your agile journey is fully assess your current state. If you're not sure where to start, here's a few key places to begin:

### ✓ Take inventory of all processes, procedures, tech, and head count

Whip out a spreadsheet and start creating lists. Document every single travel tech software tool you use, no matter how inconsequential it seems, along with its function and importance. Speak to champions in different roles and have them document a "day in the life" to get an accurate idea of workflows and business unit organization.

### ✓ Document efficiency in a controlled testing phase of your current program

Every good experiment needs a control group. Designate a start and end time for your observations. Depending on the size of your program and organization, it may be best to analyze different parts of the program separately rather than all at once. Make detailed notes of common inefficiencies, roadblocks, and gaps that reoccur, and pay close attention to cost and spend in this time frame.

### ✓ Bring in a consulting team if need be

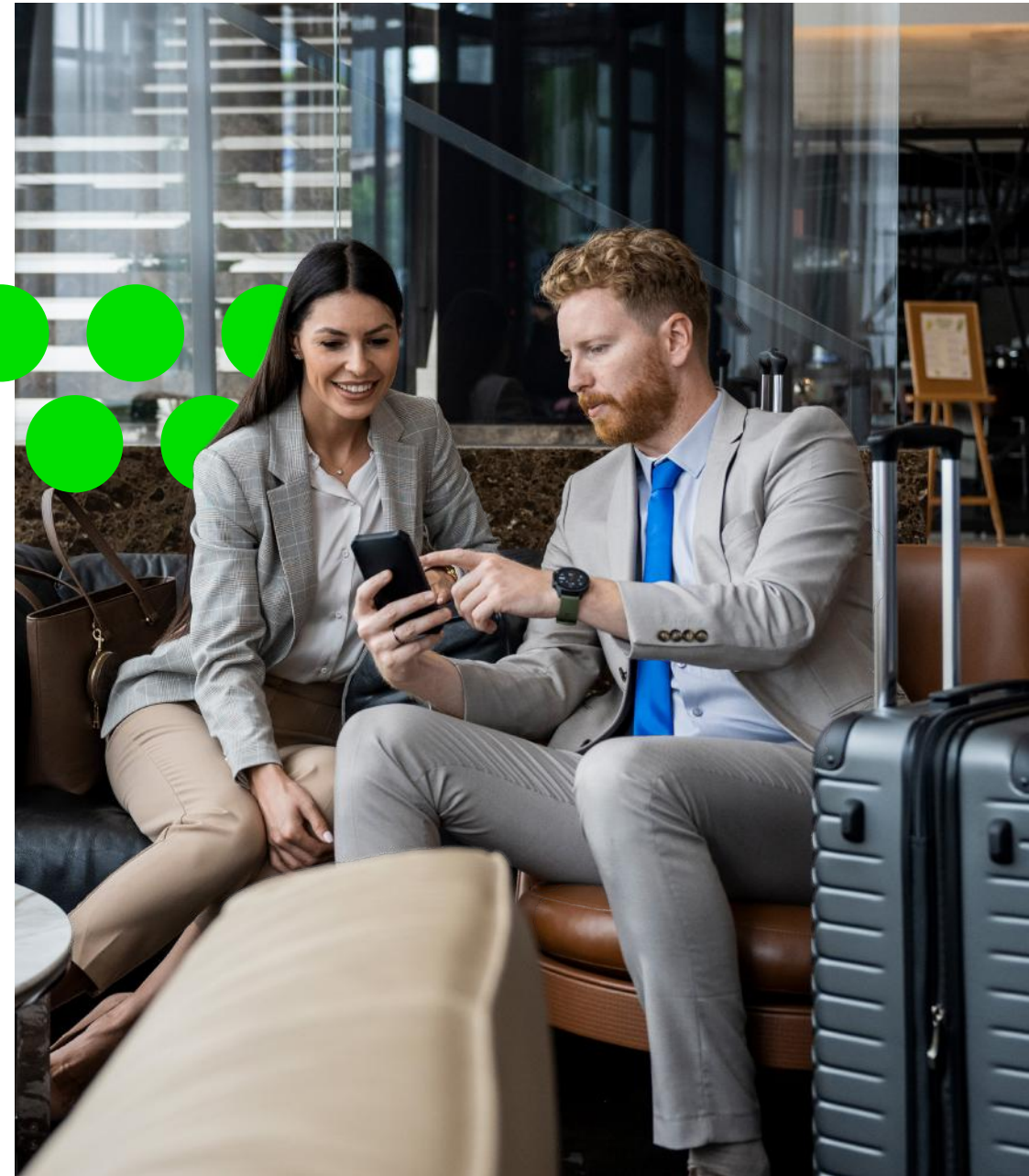
If there's a lot to unpack, you may need some extra muscle. Consider bringing in an experienced external consulting team that can help make sense of the numbers and your structure and give you industry insights.

## Starting Your Agile Journey

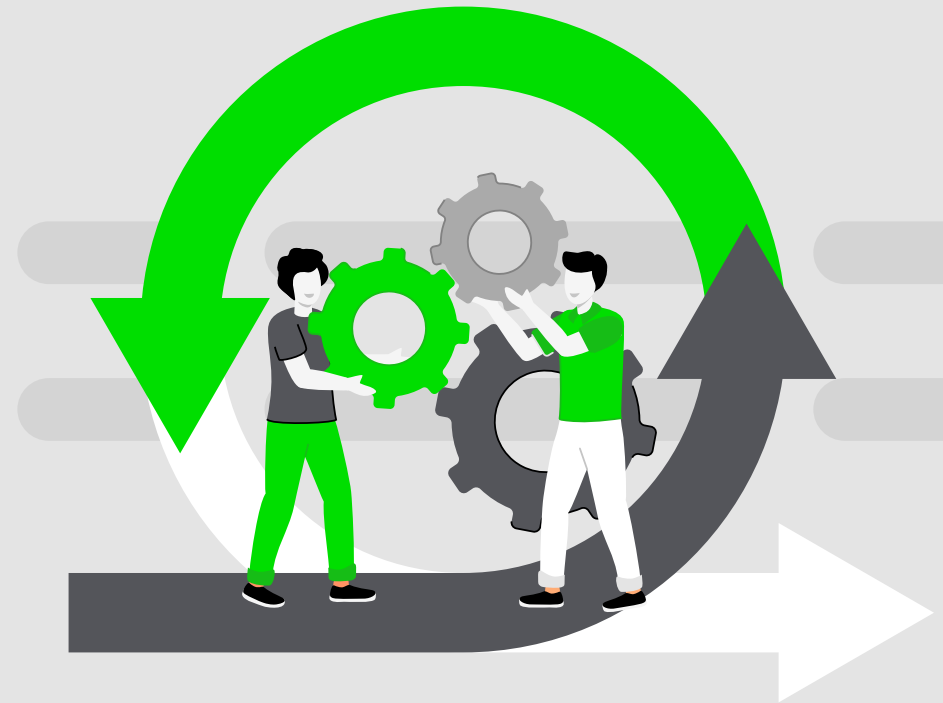
More than likely, you're going to find out you have more work to do, and that's okay. Many times we can be blinded by routine and the comfort of our standard processes and not take the time to pick them apart to really find out if they are efficient, effective, and engaging.

Historically, nothing about corporate travel management has been agile. Those terms have probably never even appeared in the same sentence before. It's complicated, slowed down by inefficient communication, and involves way too many software tools. So if you're feeling like this is an impossibility, then you're not alone. But if you're reading this book, you already know you need to get started on a new agile path. That's the first, and hardest, step.

Now that you know where you are, let's get started on this journey.

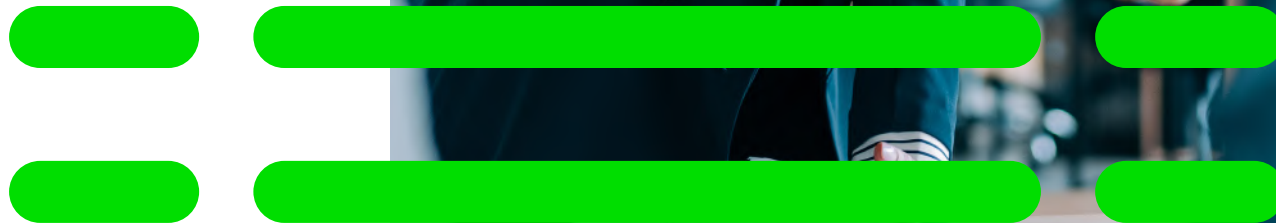


# Building an Agile Partnership



If you've set your sights on an agile travel program, then you'll need vendors who share and support your vision. Think back to the Four Pillars of Agile discussed in the introduction: what words or phrases pop out to you? Take a minute to refresh your memory.

Did words like *interaction*, *collaboration*, and *responding to change* catch your eye first? If so, you already have a lot in common with what drives an agile mindset. But how do you identify agility in your corporate travel vendors, like your travel management company (TMC) or tech supplier?



## Outsourcing Agility

You may be feeling overwhelmed by the prospect of adopting an agile approach to corporate travel because your organization as a whole doesn't have an agile mindset or is struggling to adapt. This is where partnering with an agile TMC can take the pressure off you, at least when it comes to your corporate travel program. There's a simple solution: let an agile TMC do the heavy lifting. An agile TMC will guide your program in the right direction, providing advice and strategies to keep you moving, so you can focus on other things.





## Identifying an Agile TMC

Travel management companies emerged when the need for corporations to streamline travel programs and enforce travel policies became too much of an in-house burden. And just like the process of buying the perfect new pair of shoes, you need to make sure your TMC is the right fit for your organization when it comes to cost, service-level agreements (SLA), and content availability. But now you're focused on building out an agile travel program, so how does that factor into your TMC choice?

In our experience, here are the top three signs of an agile TMC:



### The sales process is personal

You shouldn't get any "one-size-fits-all" vibes from an agile TMC during the sales, RFP, and signing stages. Each phase should build upon the last as they learn new information about your organization's needs. An agile TMC is customer-centric and lacks an ego-driven vision. If they present you with custom solutions fixing your pain points and resolving your inefficiencies, it means they listen and are willing to customize their approach; but if they are pushing a singular narrative and strategy and it feels like you're talking to a wall, then they aren't the agile partners for you.



### They're strategic partners, not firefighters

When you inquire about customer success and account management support frameworks, beware of TMCs that focus only on crisis resolution stories. Effective account management doesn't just focus on solving for worst-case scenarios and one-in-a-million situations – they'll provide insights into their day-to-day interactions with your travel program employees, demonstrate how they'll manage quarterly reviews, and explain how they monitor the current travel trends to bring you updated and optimized strategies.

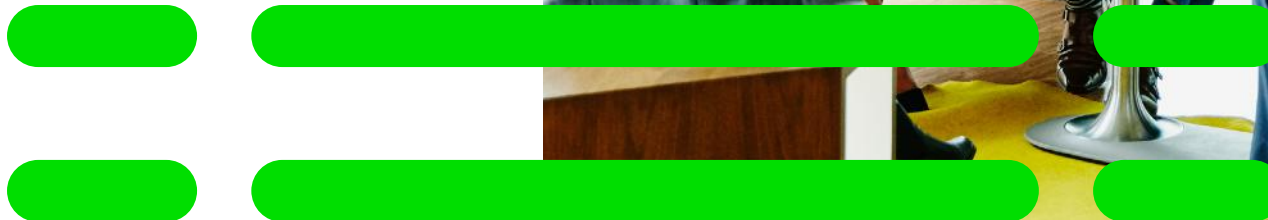


### They double as tech vendors

One-stop-shop isn't just convenient, it's efficient and consistent. TMCs that design and provide travel tech build product suites that match their overall mindset toward corporate travel management. And if their approach to travel management is agile, then you best believe they'll apply the same mindset to their travel tech as well. It's a win-win.

## Assemble an Agile Project Team

We've discussed how agility involves employees from every part of your business that will be affected by your travel program, from the HRIT admins who manage integrations, to the travel manager who enforces policy, down to the individual travelers that need to book through your chosen TMC and tech vendors. This means that your project team needs to mirror these users from the get-go so you can ensure you are dotting every i and crossing each t.



# An Agile Travel Program RFP Dream Team



## C-Suite Stakeholders

Establish early on your executive champion(s) for agile. You may not need them in every meeting or demo, but they're generally the ones who need to sign on the dotted line. Better have them sold on the vision from the start!



## Travel Manager

More than likely it was your travel manager who raised the white flag and said your travel program needed some major TLC. They should be an intrinsic part of the process. Have them document all the key pain points, concerns, and goals from the start, and then make sure each potential TMC and/or vendor matches up.



## HRIT Admin(s)

Your HRIT team probably doesn't care about how cool a one-stop-shop travel platform is, but they do care about how it will affect their HR tech stack. Integrations are critical to any successful data transfers and onboarding processes, so make sure the people who have the (API) keys are in the conversation from the start.



## Travel Agent Champion(s)

Identify travel program employees that are engaged and excited for change. Get their feedback early in the process about their day-to-day workflows and build these considerations into your RFP. These champions should also be among your first user acceptance testers (UAT).



## Business Traveler Champion

Don't forget the people who will be on the receiving end of many changes who don't usually have a lot of input. Include them in the UAT processes and document any confusion or blockers they experience.



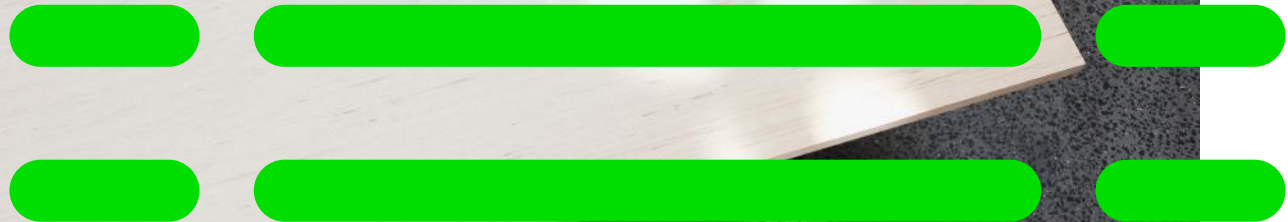
## Internal Communications Manager

If there is only one word you remember from this entire book, please make it this one: communication. Get your internal communications team onboard as early as possible, such as after signing, to design a communication plan that will leave agents and travelers feeling informed and included.

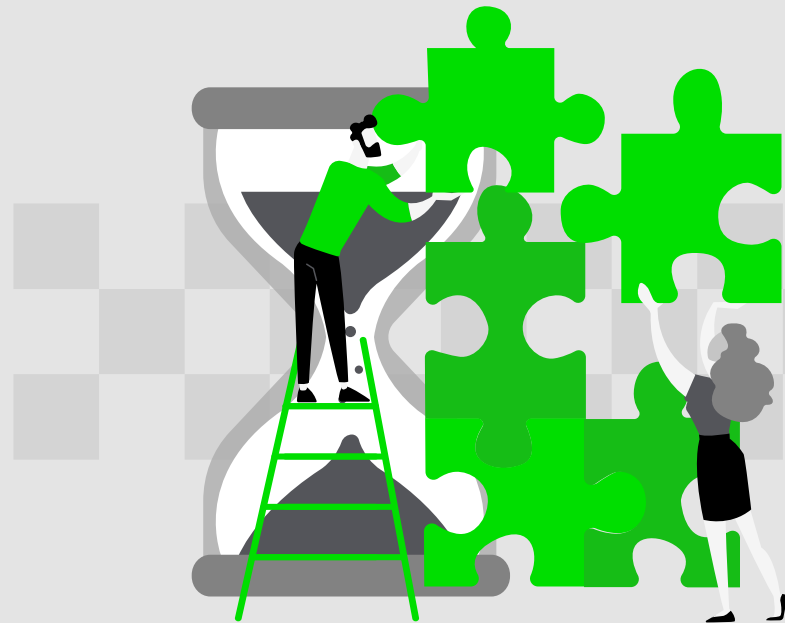


## When it comes to agile, you gotta have faith

Making such a gigantic shift in your travel program's mindset and processes is going to take time, patience, and probably some emotional toil (just kidding). Remember that agility is all about preparedness, and the more prepared you are during the preliminary phases, the better prepared you will be to identify and partner with a TMC that embraces agility the same way you want to.



# So You've Embraced Agile... Now What?



The first step is always the hardest to take, so if you've made it this far and simply decided to build out an agile travel program, then be proud of yourself! It will be well worth it.

Before you start rebuilding and redesigning, you need to put all the pieces into place. There are three buckets to consider:

### Tenets

Agile methodology was born from a community manifesto by people who wanted to create meaningful change in their industry. While “policy” is the de facto prescriptive term to use when defining the core processes and procedures of your travel program, we'd like to shift your mindset even further philosophically: think about your belief system, or principles, regarding your travel program. What drives your organization? What are your projected outcomes? From, there, create the tenets of your travel program.

#### Policy vs. Philosophy Mindset

- We need more sustainable options to be compliant vs. We want to become a more sustainable organization.
- We want to cut costs vs. We want to save money on A to invest more into B to achieve C.
- We want a one-stop-shop because we want less travel apps vs. We want to create a seamless, integrated user experience.





## Tech

Technology makes the world go ‘round, and it’s the same for your travel program. Old school travel managers may remember the days when you used an OBT...and that was it. Now, travel is more nuanced, with the human experience playing a bigger role. The travel tech space has also become crowded, with the foundation of all travel tech stacks needing a degree of flexibility that wasn’t necessary before. Travel managers may use an entire suite of products including an OBT, mobile apps, duty of care, profile management, approvals, expenses...you get the picture.

And even though you are accounting for many different functions and personas, your tech should be easy to use, accessible, cost-effective, and easily integrated with your core HRIT systems. Your travel tech providers should also operate on agility, with a development schedule scaled to meet industry demand, shifts, crises, and changes. Your third-party apps should be experience enhancers, not white noise.

## Team

Training teams on your new tenants and tech will be daunting, we won’t sugarcoat it. But, you’ll immediately set yourself up for success if you start all your enablement plans with this phrase: what’s in it for me? Motivators for your teams to adopt your new tenants and tech need to be both intrinsic and extrinsic. Intrinsically, show them how this new stuff will save them time and reduce headaches. Extrinsically, hold competitions for the most online bookings or sustainable trips scheduled. Explain to them what agility means, and how it’s going to transform the way they work for the better. Being agile is a continuous, iterative loop, so having teams that are engaged and involved in the process is important.

## Creating an Agile Tech Stack

We covered a lot about identifying an agile TMC, but what about your travel tech? Travel tech providers (if not housed with your agile TMC) need to have the same goals you do: to be adaptable changemakers ready to meet any challenge. If innovation isn't what drives them, then they aren't agile. Status quo doesn't promote change.





## 3 Signs of an Agile Tech Provider

### ✓ They are one-stop-shop (or as close as they can get)

The easiest way to improve the user experience, streamline communications, and correct inefficiencies is to get everything in one place. If all it takes to switch between booking and duty of care is the click of a menu item, then you're already on the right track. The less your users must leave one system for another, the better. This is why you also need a tech provider with a flexible API structure and can integrate with your boutique apps and HRIT platforms.

### ✓ They have a sprint-based development schedule

Their roadmap should show a scaled, need-based development schedule that is built around current industry and customer needs. They should also demonstrate the ability to swap things in and out as needed and adapt to industry shifts without their entire process falling apart. User feedback should also be of the utmost importance to their development roadmap.

### ✓ They are mission-based, not numbers driven

Innovative tech is inspired by the drive to solve common problems. You can clearly tell when someone created a tech product for vanity, and when they created it for the greater good. Modern travel technology needs to focus on people, planet, and profit, while solving problems for the people using and benefiting from it, not just a bottom line.



## Enabling Agile Teams

70% of organizational change attempts fail.

**Why?** Because people don't feel informed or included in the decision. Your teams don't want to be blindsided by change. They should be informed during every step of the process, with communication, demos, and training sessions.



Here is a suggested timeline for a new agile travel program rollout:

**01** Send an email announcing the intent to become more agile. Name the new providers, project leaders, and why the organization is going in this direction.

**02** Identify champions in your travel department. Bring them into enablement conversations early, and prepare to “train the trainer,” meaning, prep these champions to help upskill their teams.

**03** Hold a department-wide demo of the new software and introduce your new tenants. Field questions and quell any concerns. Reiterate your mission and key goals.

**04** Start small group training sessions. Let team members get hands on with the technology and test it, providing feedback in a safe environment.

**05** Once you launch your technology and new program, set 30/60/90-day benchmarks to check on key progress points. Schedule regular check-ins with your vendor Account Manager and address any issues and assess progress.

To sum it up simply, treat your users like teammates in your agile identity shift, and you'll set yourself up for success.

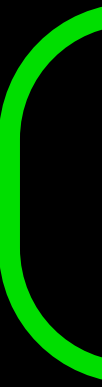
# Putting it All Together

It's a lot of work to convert to an agile framework, but it pays back in dividends with cost-savings and process improvements. Again, it's important to remember that agile is preparedness. If you take all these considerations in mind, what may have in the past amounted to a catastrophe may just become a light inconvenience.

Designing an agile travel program isn't about flipping your entire organization on its head – it's about the process of partnering with agile TMCs and tech providers that can fill those gaps and take the pressure off you.



# About FCM



FCM is a proven changemaker with more than **300 multinational clients** for whom we consolidated over **\$2 billion in travel spend**. New FCM clients save an average of **10%** in their first contract year, with a mature program saving an average of **5%** each contract year. We're experts in agile travel tech and programs, and are determined to be the proven alternative to status quo corporate travel management.

Our new travel management platform is designed to make the world of business travel simpler with open platform flexibility that delivers a user experience that people genuinely love. Built and designed entirely in-house, our platform is easy to use and wrapped around user feedback, making it a tool your travelers want and need.

If you are ready for an agile transformation, we're here to talk. Reach out to us today for a Q&A and demo, and let us show you why we're corporations' favorite TMC.

[fcmtravel.com](https://fcmtravel.com)