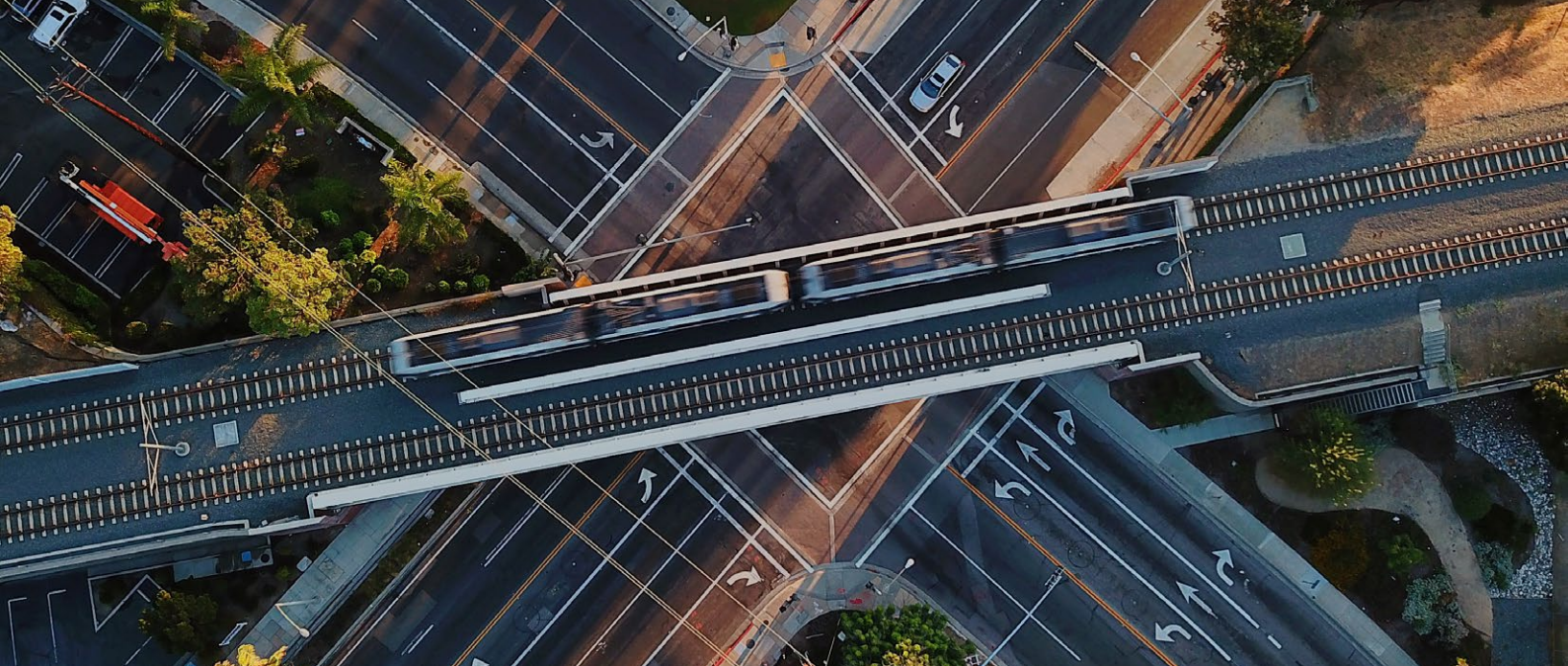




# RSA Insurance Group

Case Study





# Case Study

## RSA Insurance Group

Hotel online  
adoption rate

82%

Air online  
adoption rate

61%

### Background: a travel programme review

With a 300-year heritage, RSA is a multinational quoted insurance group. RSA operates three core business segments: Canada, Scandinavia and UK & International; and can write business in over 100 countries. RSA's Procurement Team owns the travel category and directly manages the operational travel activities.

RSA's incumbent travel management company had been in place for eight years. However, the service was inconsistent and technology needed upgrading. A complete review of the group's travel programme was required.

Following a competitive tender process, FCM Travel was appointed to provide travel management services to RSA for GCC, UK & Ireland in January 2018. Implementation began in February and go live was on 1st July 2018.

### Objectives

- Greater focus on personal service and a partnership approach between RSA and their TMC.
- Enhance and future-proof travel technology solutions, including a new central travel portal and introduction of new online booking tool.
- Introduce effective approval processes as previously none were in place.
- Support the procurement department and ease their workload in terms of managing travel user access requests, general travel administration, updates on RSA's intranet platform (Yammer) and handling internal business travel queries.
- Automate and enhance traveller tracking and safety support as this was previously handled manually by the incumbent.

# Four ways service and tech helped



## 1 Dedicated servicing

Nothing beats a personal service, which RSA now gets from a team of six FCM travel consultants. They handle day-to-day travel requirements over phone and email. By using a business travel email inbox specifically for RSA, the team can quickly assist bookers and travellers with their general enquiries and travel bookings, including:

- **Insurance client/broker and internal meetings** - approx. 2,000 UK staff who travel regularly within the UK, Ireland and Europe.
- **Group relations** – approx. 150 staff, who previously had a VIP service but are now supported for their complicated multi-trip journeys.
- **Global risk solutions** – approx. 200-300 staff who carry out commercial insurance inspections, occasionally in remote countries. This group did not engage with the previous TMC as they didn't feel they received a service relevant to their travel requirements and were handling their own travel bookings.

In addition, a VIP consultant works closely with the EAs of RSA's CEO and CFOs for bespoke travel needs.

With this set-up, RSA has not only seen service improve, but it has eased the procurement department's workload significantly.

## 2 New technology incorporating approvals

FCM Platform was implemented with cytric as the online booking tool engine behind it. The platform was configured according to RSA's preferred suppliers and travel policies. The FCM Platform is the gateway not only to our suite of innovative technology tools (from pre-trip approval and booking, to traveller tracking and reporting) but all things travel-related such as RSA's travel and expense policies, and health and safety guidelines.

*“RSA love that FCM Platform gives them everything travel-related in one place. For example, we host links to Trainline for rail bookings and Enterprise for car hire within the platform,” said Hayley France, FCM Account Manager. “Previously the client's travel booking tools and resources were disconnected and any information relating to business travel guidelines was spread across the internal intranet”.*

Training for RSA's PA and EA travel bookers took place in June 2018 with Hayley France, FCM Account Manager, Dominic Hall, Ops Team Leader, and Johnny Palmer, FCM's online training specialist. They were not only training sessions, but an opportunity for travellers and bookers to flag any changes that our product team could amend. The team held:

- Full-day training sessions in several RSA office locations.
- Seven Webex sessions for travellers and bookers who had been unable to attend a roadshow.
- Series of roadshows at seven RSA offices across the country.

**Hayley France, FCM Account Manager, explains:**

*“Feedback from RSA staff following the roadshows was really good. They were particularly impressed with the training given by Johnny who they described as ‘brilliant’. There are always a few teething problems when implementing technology, but despite some initial challenges, this is proving to be a great online tool for RSA and adoption rates are excellent.”*



# Four ways service and tech helped

## 3 Pre-approval is now automated

Initially, RSA wanted approval to be given at Executive Level for all travel requests. However during implementation, it became evident that this level of approval would be too demanding and time-consuming. A week before go-live, the decision was taken to bring approval back to Line Manager level. Despite this change at short notice, the FCM team and the RSA project team implemented the new approval process within a week.

This gives RSA's bookers and traveller easy access to a clear and simple processes for travel authorisation. Approval is based on rate caps for hotels and flights by RSA's travel policy.

## 4 'Implant' Account Manager

FCM Account Manager, Hayley France, initially took on a much greater role. She was in effect an 'implant' Account Manager to provide greater internal support and communications, taking over tasks previously handled by the procurement department.

In addition to FCM's usual account management services, Hayley assumed responsibility for managing RSA's intranet travel page and posts regular travel updates on Yammer. She also oversees internal travel communications, visits RSA's head office, as well as other locations around the country frequently, and has an RSA email address to support the client with advice and answering questions.

*"We needed more support from our TMC in terms of taking over some of the business travel tasks and responsibilities that had been handled by procurement. At the end of the day we are not travel experts, so having Hayley as an 'implant' Account Manager and the support of the offline FCM team who has access to our systems, is part of our culture and a focal point for business travel in RSA, this has made a big difference".*

- Sarah Morrison, Procurement Category Manager, RSA





## Results

After just four months and with no additional training since implementation, online adoption rates were already extremely high at **82%** for hotels and **61%** for air.

- Rate caps and approvals for air and hotels are now in place through the online tool, meaning processes are much more streamlined and efficient.
- RSA's Procurement Manager has been able to take a step back from managing internal business travel processes and communications as FCM's Account Manager Hayley has taken responsibility for this aspect.
- The client is much happier with the service levels they receive from their TMC as bookers and travellers can contact the team at any time.
- Traveller tracking and security are automated, giving RSA more credible data and greater visibility. RSA also has access to duty of care reporting within the platform, a dashboard-based travel risk management tool that can provide RSA with itinerary-based traveller tracking and flight monitor reporting if required.
- Hotel bookings are a major element of RSA's travel programme. FCM introduced the team to FCM Consulting, who analysed RSA's hotel needs, volumes, booking patterns and locations to develop a bespoke hotel programme that drives greater efficiencies and ROI.

*"We are very happy with the level of engagement and service that FCM is now providing. Our bookers and travellers can contact the FCM team any time they need help.*

*FCM has also helped us to make conscious choices around approval processes, introduction of rate caps and better integration of technology, enabling us to future-proof our entire travel programme.*

*Introduction of the platform as our own travel portal means that everything is integrated in one place include rail, car hire and other services. We can also make better business decisions as a result of the proactive provision of data and MI available to us via the FCM Platform."*

**- Sarah Morrison, RSA Procurement Category Manager**