TALES FROM THE IMPLEMENTATION FRONT

YEAR 1 –

REQUIRED USE OF MANAGED BOOKING

PRESENTED BY

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UNIVERSITY OF WISCONSIN SYSTEM IS...

UW System

- 13 – Four-Year Universities
- 13 – Two-Year College Campuses
- 72 – UW Extension Offices
- 181,000 Students / Year
- 39,000 Faculty and Staff
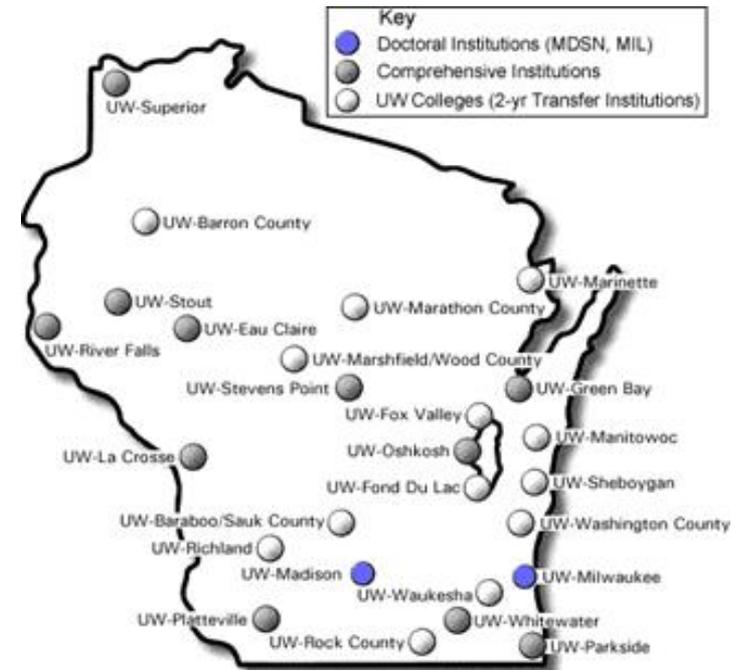
UW SYSTEM

GOVERNED BY

18 Member Board of Regents

- 16 - Appointed by the Governor,
- 2 - UW Student Regents

Board Appoints:

- UW System President
- Chancellors
- Deans
  - *(for 2 year campuses)*

Institutions operate with high degree of autonomy and decentralized operations. UW System Administration's role is to facilitate and manage change for programs and projects when the "whole is greater than the sum of the parts".

Key
- Doctoral Institutions (MDSN, MIL)
- Comprehensive Institutions
- UW Colleges (2-yr Transfer Institutions)

UW SYSTEM
TRAVEL PROGRAM BACKGROUND

- **<u>Managed</u> by the State of Wisconsin**
  - UW System = State Agency
- **<u>Required</u> by State Statue to adhere to**
  - State's Policy & Rates
- **Hospitality Related Expenses**
  - No policy or rate structure
- **Purchasing Dynamics**
  - Purchasing Cards & Corporate Travel Cards
  - Travel Arrangers – Purchasing Cards / CTA products
- **Pre-Reimbursement of Policy Compliant Airfare**
- **2012 Biennium – Governor *granted* UW**
  - Authority to establish University specific policies, contracts, rates for travel

UW SYSTEM
TRAVEL PROGRAM REDESIGN

- **Created - Travel Management & Operations Committee (TMOC)**
  - Mission: To Develop, Operationalize, and Implement Managed Travel Goals
  - 17 Members – cross-system institutions and campus representation
  - Meetings: 2 x per month – 10 hours or more for outside "homework"
  - Yammer is used for committee collaboration and sharing information

UW SYSTEM
TRAVEL PROGRAM REDESIGN

- **Travel Industry Expert Panel**

  - Defined Managed Travel & Benefits

- **Redesigned Cost Containment Goals**

  - Balanced Focus on: Comfort, Service, & Traveler Support
    - Strategic Sourcing
    - Accountability
    - Process Efficiency
    - Enhanced Data
    - Clear Policy & Business Process Standards
    - Duty of Care

UW SYSTEM
TRAVEL PROGRAM REDESIGN

Board of Regents Issued a

- High-Level General Travel Policy to set expectations and create a "Top Down" approach to managed travel

- Phased Approach to Implementation

  - Committee developed new air purchase & payment policy requiring managed booking for individual domestic and non-complex international

  - Negotiated airline agreements to enhance managed booking

  - Changed allowable payment methods to match new policy and encourage compliance

UW SYSTEM
PHASE 1 - IMPLEMENTATION

- **Partner with a Single TMC to Support Goals & Provide Services**

    - Online, Full Service, Onsite Agent Support, Duty of Care, Technology, Standard Communication and Training Platform

- **RFP Bid Process**

    - Cross-institutional team to develop requirements, evaluate responses, and recommend award

- **Contract awarded in June 2013**

- **Deadline & Go Live Date: July 1, 2013**

UW SYSTEM
PHASE 1 - IMPLEMENTATION

- **NEW Managed Airfare Booking Policy**

  - <u>Required use</u> of Concur OBT or TMC for all Individual Domestic and Non-Complex International

- **Partnered with Major Airlines**

- **Implemented Lodging Consortium Discounts**

- **Promoted Car Rental Contracts**

UW SYSTEM
PHASE 1 - IMPLEMENTATION

- **NEW Branding**

- **NEW UW TravelWIse Portal**

  - **One Stop Shop**
    - Booking Options
    - Agent bios/photos
    - User Guides & Tutorial Videos
    - Procedures
    - Traveler Alerts

UW SYSTEM
PHASE 1 - OPERATIONALIZING

- **In Person System wide Travel Management Meeting**

  - 2 Days of In-depth Preparation

  - Understand Program Goals

  - Online Booking Technology

  - Reporting

- **NEW Travel Administrator's Intranet Site**

  - User Guides

  - Canned Consistent Communications

  - FAQ's

  - Audit Steps

  - Technical Documents

UW SYSTEM
PHASE 1 - OPERATIONALIZING

Fox World Travel – Customized Services for Support Success

- **Online Technical Support Desk**
  - Dedicated Fox Team
  - 24/7

- **After Hours Support**
  - Dedicated Fox Team

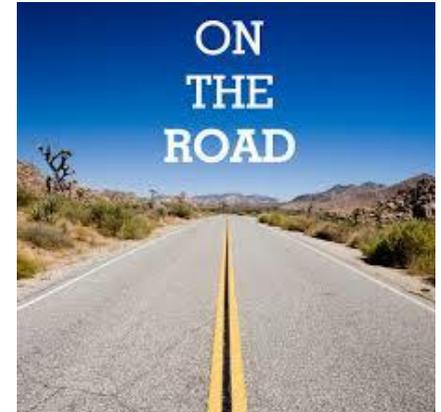- **Fox Standard Operating Procedures**

UW SYSTEM
PHASE 1 - OPERATIONALIZING

- **Communication to Masses**

  - Travel Road Show - 8 Weeks
  - Information Sessions – Who, What, Why, How
  - Over 2,300 attendees

- **Marketing Materials**

  - Luggage Tags
  - Receipt Envelopes
  - Key Tag
  - Contact Cards

UW SYSTEM
PHASE 1 - OPERATIONALIZING

- **Travel Showcase – UW Milwaukee**

  - TMC / Online Training
  - Preferred Vendors

- **Group Services – Focus Meetings**

  - International
  - Athletics
  - Student Groups

UW SYSTEM
PHASE 1 - OPERATIONALIZING

Wait and See……. Did all of the efforts work??!!

UW SYSTEM
PHASE 1 - OPERATIONALIZING

Actively Gathered Feedback – Our Customers are Saying

"The booking process was seamless and very efficient! I liked it!"

"In the past, I had to make reservations in multiple sites – conference, hotel, air, and car if needed. This is all in one place, less hassle/time for me."

"Just a note that the new Travel site is wonderful. From the ease of use to the agents helping out…."

"I had the most incredible experience booking an international flight to China…..?"

UW SYSTEM
PHASE 1 - OPERATIONALIZING

Actively Gathered Feedback – Travel Managers are saying

"Managed travel increases the productivity of our educators and other staff, allowing them to focus on other their expertise. The managed booking channel saves times, provides efficiency, & results in a positive traveler experience."

"Having a system wide committee to focus on redesigning the travel program has helped the entire System gain consistency which is important in managing travel at the institution level."

"Fox has been so great, always able to accommodate the need, no matter what it is."

"Having the UW TravelWIse portal has been a great resource for managing change– whether campus leadership, faculty and staff, or the new employee there is something for everyone."

UW SYSTEM
SUCCESSES

- **Great Participation in the State-wide Road Show**

- **Increased Usage of Managed Travel Program – Up 300%**

  - With all the efforts, large gaps remain………
- **Strong Top Down Approach and Support**

  - Some campuses required ALL air to be booked with Fox
- **Consolidated Data and Transparency into Air Spend**

  - Increased partnership benefits
- **Complex International & Group Reservations**

  - Fox agent team saw a dramatic increase
- **Realized Traveler Support Services & Duty of Care**

  - Air delays, cancellations, critical travel events

UW SYSTEM
SUCCESSES

- **Usage of UW Travel WIse portal and Features**
  - Traveler's Voice
  - Online Technical Support
  - Training Videos and Guides

- **Fox Low Fare Guarantee**
  - Communicated service and process

- **Implemented Flexible Operations**
  - Crafted business processes & increased services
    - Split Payments
    - Travel Companion
    - Job Candidates

UW SYSTEM
SUCCESSES & LESSONS LEARNED

UW SYSTEM
LESSONS LEARNED

- **Business Travel is Personal – Mainstream Media Challenges**

  - Traveler's Expectations / Price Savvy Shopper / I heard…

- **Change Management Doesn't Stop**

  - Consistent and Persistent Messaging

- **Staff Turnover –** *Re-education*

- **MUST have Top Down Support at ALL institutions and campuses**

  - Policy doesn't matter if not made a priority

- **Consequences for Non-Compliance**

  - Must be strong and consistent

- **Self Booking Fees are Point of Contention**

- **Automation & Process Efficiencies**

UW SYSTEM
PHASE 2 – THE FUTURE

- **Change to Air Policy – Required Use for All UW paid airfare**

- **Financial *Disincentives* for Non-Compliant Bookings**

  - $$$ to be deducted from reimbursement

- **Centrally Pay Self Booking Fees – *Technology Fee***

- **New Policies & Enhanced Rate Model with Per Diem Flexibility**

  - Lodging, personal vehicle mileage, meals/incidentals
  - Per Diem Calculator - Beta

- **New Policies & Rates - Easily Automated in Expense Reporting**

- **Managed Booking of Lodging**

  - New contracted rates / terms

UW SYSTEM
PHASE 2 – THE FUTURE

- **Enhanced Risk Management – Technology**

- **Campus Dashboard "Scorecard" Reporting – Gamification**

- **TSA PreCheck – Enroll Your Own & Reimbursement Of Costs**

- **Traveler Refresher Seminars**

- **Annual Travel Manager In Person Meeting**

- **Airline Partners – Contract Re-Negotiations**

CONSISTENT AND PERSISTENT COMMUNICATION

Thank You !!!

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