

## **OFFICE ADMINISTRATION (DES 1204)**

**LECTURE : 12**

**TOPIC : Arrange travel and accommodation.**

**AIM : To identify the necessary arrangements required for travel.**

### **LEARNING OUTCOMES:**

**After completing this topic, you should be able to understand:**

- 1. The arrangements required for travel.**

### **TOPIC OUTLINE:**

- 1. Plan travel and accommodation**



## 6.1 Plan travel and accommodation

Most organizations operate a strict travel budget and have policies covering the type and class of travel that is permitted, the type and class of hotel accommodation allowed and the amount of money that can be allocated for daily subsistence (i.e. basic needs such as food, taxis, tips etc); the policies may allow for the classifications of travel and accommodation to be varied in different situations – for instance, the main criterion used is the seniority of the member of staff involved, sometimes the length of the trip may also be a deciding factor.

It is important when making arrangements for travel and accommodation that careful and systematic planning is done to ensure that action is timely and nothing overlooked. Checklists of the action to be taken are helpful as a reminder of jobs to be done.

### *Checklist for inland travel*

Agree dates and enter them in the diary;  
Book hotel (if required);  
Arrange meetings/appointments, as required;  
Prepare an itinerary;  
Collect air or rail tickets and seat reservations (if required);  
Assemble the following items for the traveller:

- itinerary
- hotel brochure and confirmation of booking
- road map book (if travelling by car)
- air/rail tickets
- file of correspondence/documents for meetings/appointments, etc.
- supply of business stationery, including visiting cards

Discuss any outstanding matters to be dealt with in the office during the period of visit.

### *Travel departments and travel agents*

Large companies whose personnel travel frequently are likely to operate their own travel section or department which in turn will be likely to liaise with a travel agent – possibly one specializing in business travel.

Nonetheless, a secretary will still play a crucial role and will be the person to make contact with the travel section, or, in the case of a smaller company, direct with the agent.

### *Checklist for travel agent*

#### **Information to be supplied when using the services of a travel agent:**

journey dates;  
countries/places to be visited;  
airlines preference;  
class of travel, i.e. first class, executive class (business/club) or economy class (tourist);  
smoking or non-smoking seats;  
car hire;  
if travelling by car, registration number, type of car and length of car;  
hotel reservations;  
insurance;  
visa;  
transport to airport.

### *Checklist for booking accommodation*

Check essential details with the person requiring the accommodation and note down the dates, venues, hotels if requested, and their requirements for accommodation;

Select suitable accommodation which meets the needs of the traveller (reference may be made to reference books such as the AA Members' Handbook.);

Telephone the hotel to reserve accommodation and ascertain the price. You will need to provide the following information:

- name(s) of people requiring accommodation
- dates and times – specifying clearly the nights for which the room is required and approximate times of arrival and departure
- type of room required, i.e. single, double, twin
- method of payment to be used

Confirm the telephoned reservation in writing by letter or fax and request a confirmation by the hotel.

### *Checklist for foreign travel*

#### **First tasks**

Agree dates and enter them in diary;  
Airline tickets booked;  
Insurance arranged;

Hotel booked;  
Vaccinations arranged, if necessary;  
Visa applied for, if required;  
Passport – still current?  
Arrange meetings/appointments abroad;  
Business visiting cards printed with information on reverse in language of country visited;  
Information about country visited – send for copy of *Hints to Exporters*;  
Arrange to be met at foreign airport/hire car;  
Apply to AA for international driving permit.

### **One week before departure**

Check receipt of airline tickets;  
Check receipt of insurance certificate;  
Check confirmation of hotel booking;  
Check receipt of visa, if required;  
Order travellers cheques and currency from bank;  
Prepare itinerary;  
Book transport to airport in this country.

### **1 – 2 days before departure**

Collect travellers cheques and currency from bank;  
Assemble the following items and hand to traveller:

- airline tickets
- insurance certificate
- vaccination certificate
- visa
- passport
- *Hints for Exporters* booklet
- travellers cheques and foreign currency
- itinerary
- hotel brochure and confirmation of booking
- international driving permit
- confirmation of transport arrangements
- file of correspondence/documents for meetings/appointments
- supply of stationery for use abroad
- business visiting cards

Discuss any outstanding matters.

## ***Sources of reference on travel***

### ***The Travel Trade Directory***

The Travel Trade Directory is published annually and contains a valuable selection of useful and up-to-date information on all forms of travel, as well as providing details of all forms of travel operators, addresses of passport and visa offices and all other specialist travel services.

### ***The World Calendar of Holidays***

The World Calendar of Holidays is another useful annual publication which details public holidays both chronologically and in alphabetical order of country. This is very useful as a reference source as it may mean preventing a wasted journey; for example, an executive could arrive at a foreign destination only to discover that he is in the midst of some holiday or religious festival.

### ***Hints to businessmen***

This is a free series of booklets covering many countries of the world and providing useful advice on travel, entry regulations, customs control, consular facilities, hotels etc. It is produced by the Department of Trade and Industry.

### ***Travel Information Manual***

This is a joint monthly publication of IATA member airlines and contains information for all countries in respect of passport and visa requirements, health regulations, airport taxes, customs, currency and other government requirements.

### ***The ABC World Airways Guide***

The ABC World Airways Guide is published monthly and contains complete timetables for the airlines of the world. It gives details of fares, international travel requirements, passports, visas and health regulations in operation.

### ***AAM Handbook***

The Automobile Association Members' or AAM Handbook has motoring information that includes road maps, hotels, garages, and distances between towns.

## ***Methods of Travel***

### ***Travelling by Air***

Much business travel is done by air and the following are points to remember if the benefits of flying are to be maximized:

distance involved and the likelihood of jet lag;  
duration of the business trip;  
comfort – first class, business class, executive or economy;  
availability of special on-board facilities for business travellers;  
the desirability of direct rather than stopover flights;  
time savings to be gained by using Concorde on a trans-Atlantic crossing;  
distance of the departure point and appointment venue from the respective airports;  
implications of delays in making flight connections or perhaps changing airports;  
airport facilities;  
baggage restrictions;  
shuttle service for domestic flights;  
travelling at peak holiday periods;  
booking difficulties on certain routes.

### ***Travelling by train***

In respect of making train arrangements the following are some points to remember and consider:

duration of journey;  
services available on trains, including meals;  
the need to book seats and to distinguish between smoking and non-smoking compartments and seat facing directions;  
the benefits of executive ticket, viz. reserved car parking at the departure station, reserved first class travel, refreshment vouchers etc.;  
the possibility of sleeper accommodation on longer journeys;  
the possibility of taking one's car on the train for use at the destination;  
the convenience of maintaining a supply of prepaid tickets for emergency use.

### ***Travelling by car***

In respect of making car arrangements the following need to be considered:

the need to carry a warning triangle to use in the event of an emergency stop;  
first aid kits are obligatory in some countries;  
the advisability of carrying spare parts;  
the need for adequate, up-to-date road maps;  
the services provided by the RA and AA;  
essential currency for toll charges by using autoroutes;

necessary driving documents (whether using own car or hiring) – some countries still require an international driving licence;  
knowledge of driving and insurance restrictions and regulations for the countries in question.

As an alternative to using their own cars, many business people opt for the convenience of the hire car. These can often be hired on a 'rent it here, leave it there' basis within countries for a minimum 48 hours, which can be particularly useful where combined with flight arrangements.

### ***Travel Tickets***

Check with timetables for the most appropriate departure and arrival times. Remember that the airport, ferry port, railway station may be a good distance from the hotel or meeting place and therefore allow for traveling time. Also remember the time difference across the world.

Air tickets may be purchased direct from the airline or the travel agent. Rail tickets are purchased from Railway booking offices or authorized travel agents. Ferry tickets may be purchased from ferry companies or travel agents.

Give precise details of the type of ticket required and the departure/arrival times. If there are any problems, seek advice from the travel agent or company.

Arrange for the tickets to be sent to the office or if it is a late booking to be collected on departure.

### ***Documentation required***

#### ***Itinerary***

An itinerary is simply a document referring to the details and plans for a journey or trip, including timing of events and information on modes of travel, departure and arrival times, accommodation and other items of information which may be useful to the traveller.

Points to consider when preparing an itinerary:

- Do not make the schedule too tight – allow breathing space;
- Bear in mind time changes and the international date line;
- Consider factors such political unrest and strikes;

Note weather conditions – dramatic changes in temperature can cause fatigue and add to the problems of jet lag;  
Remember that holiday times are always busier;  
There may be local holidays or religious festivals in the countries to be visited;  
Always use the 24 hour clock to avoid confusion;  
Always include check-in times in your calculations;  
Allow for changes between stations and airport terminals;  
Include flight numbers;  
Allow free half days during lengthy trips for catching up and relaxation;  
Include a set time for contacting the home base or vice versa.

### ***Passports***

These must be up-to-date and valid for the type of trip envisaged. Full 10-year passports are available from the UK Passport offices but take time to be processed, renewed or amended. Order a new passport in good time if the pages are nearly all used up.

### ***Visas***

These are necessary to secure entry into some countries and it is important to check the regulations applying at any particular time as they change frequently. Information is obtainable from the appropriate embassy or from the International Air Transport Association (IATA). Again sufficient time should be allowed to arrange for visas.

### ***International Driving Licences***

The Automobile Association and the Royal Automobile Club are authorized to issue international driving licences at a relatively modest fee to those people travelling abroad. Charges are minimal and licences are issued to any current holder of a valid licence on production of two passport size photographs and the appropriate fee.

### ***Insurance certificates***

Travel can be hazardous and adequate insurance cover is essential. This should cover all contingencies from death, personal accident, medical expenses, loss of money and personal property including luggage.

### ***Health Certificates***

Some countries require travellers to have certain inoculations/vaccinations. Again current health regulations are available from IATA. The main health risks are in respect of cholera, malaria, typhoid, polio and yellow fever and any necessary inoculations/vaccinations should be had well in advance of any trip in case there are side effects to overcome.

## ***Other documents and preparations***

### ***Maps***

Where the executive is not familiar with the area it will be helpful to organize suitable maps, including street maps and perhaps a local sketch map. Sometimes, where they may be attending an organized conference these will be sent automatically together with the conference programme and any other items of possible local interest.

### ***Phrase book***

Where someone is visiting a foreign country and is unfamiliar with the language, a simple phrase book can prove invaluable.

### ***Briefing documents***

These may take the form of providing any relevant facts or information relating to the visit. There may, for example, be a synopsis of the company or companies to be visited, general policies, financial positions, future plans and personnel. Such details will enable the executive to 'do his homework' or 'revise' prior to a visit. This advance knowledge is likely to be useful during meetings and interviews and will also serve to impress clients or prospective customers.

### ***Speeches***

Where an executive is required to make a speech at a function or give a formal lecture at a conference he should be well prepared. The speech may have to be vetted in advance by the organization, and it will be customary to have determined the content and have it typed up prior to departure. Likewise, any supportive documents or visual aids should be ready.

### ***Sales Literature***

Where a trip is planned as part of a sales promotion exercise it will be necessary to have ample supplies of sales literature, preferably in the language of the country. This will indicate the necessity of forward planning as such materials are not produced overnight and in order to create a favourable impression it will be important to secure accurate translations and presentations that can in no way cause offence.

### ***Visiting cards***

An executive who does a lot of travelling and meets many potential clients and other influential contacts should always have an adequate supply of printed business cards to hand out. These should be appropriate to their status within the organization they represent and include all relevant information.



### ***Checklists***

During a lengthy trip involving many meetings and appointments, it will be useful for an executive to have a summary card printed for each day. These will provide details of all appointments set out in chronological order, together with names, addresses and telephone numbers. Such cards can be easily carried in a pocket.

### ***Addresses and telephone lists***

Where a trip is spread over several days or even weeks, it will be advisable to prepare a detailed list of all possible business contacts in the area of the visit, in case opportunities present themselves for extra contacts to be made.

### ***Emergency information***

Where a person is travelling in a foreign country for the first time and no relevant language knowledge is possessed, it is a good idea to have things like the name and address of the host company and hotel details written on cards in the language of the country. These can be useful to show to taxi drivers or to police and other officials should any difficulties be experienced.

### ***Display equipment***

On certain trips, particularly those made by marketing executives, support material in the form of professionally prepared audiovisual presentations may be desired. Where travel is within the country, cars can easily be loaded accordingly. However, lightweight travel packs available nowadays also make presentations abroad relatively simple to include in a promotional programme.

### ***Specimens and samples***

Sometimes, depending on the nature of the product being promoted, it will be possible to take actual samples. Where these are electrical it will be important to check plug types and voltage, which vary from country to country.

### ***Financial arrangements***

It will be important to ensure that the necessary financial arrangements have been made for any business trip. Sometimes, this will be purely the funds necessary to sustain the executive during the trip but on other occasions it may mean arranging currency for business deals, perhaps involving large sums of money.

In any event, it is important to check currency regulations and restrictions in advance. Up-to-date information will be available from the Central Bank of the country concerned.

Arrangements should be made well in advance as to the manner and amount of currency to be taken.

Several possibilities exist dependent on the nature of the trip and whether business deals may be anticipated, in which case additional arrangements with banks in respect of *Banker's Drafts* or currency transfers may have to be made. The countries to be visited will have a bearing on which option(s) are to be advised. However, in general it will be a matter of choosing from the following options:

- cash in the relevant currency or currencies;
- Euro cheques supported by appropriate cards;
- travellers' cheques in an appropriate currency and in denominations of a suitable size;
- credit cards.

Whichever variations are used, it is important that records are kept of all cheques and card numbers in case of thefts. Also where credit cards are to be used, expiry dates should be examined.



#### TUTORIAL QUESTIONS:

1. Identify some of the main documents required for overseas travel.
2. What are the sources of reference on travel?
3. Define what an itinerary is and the factors that need to be taken into account when preparing it.
4. Provide a checklist for overseas travel.
5. What are the financial options available to an executive for overseas travel.