



Module 6 : Hotel and travel arrangements

- What you should look for when booking a hotel for business travel
- Things you should avoid when making travel arrangements
- How to plan and execute a successful business trip
- The role of a PA in booking hotels and making other travel arrangements for business travel

In this module, you will learn how to book and arrange business travel. As a PA, your boss may have to travel quite often for business meetings. A lot of the time you will be required to plan their whole trip, making sure it runs smoothly without glitches. Sometimes, PAs may also have to travel along on business trips.

In this module you will learn:

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6.1 Introduction



The concept of business travel may sound redundant in the face of digital communication technology.

After all, companies are averse to spending valuable resources on physical travel when you have the option of using video conferencing and so on. But the truth is that sometimes, face-to-face meetings are absolutely essential.

Discussing potential business proposals and transactions during travel can be less disruptive and more efficient. Business travel may also involve factory and on-site visits in order to get updated on production methods and distribution systems. Personal meetings foster networking and helps build strong business relationships. Hence, business travel continues to be an important part of a manager's job function.

Booking hotels and making travel arrangements is an integral component of your job function as a PA.

There are several factors to consider while planning a business trip. The efficiency of the travel arrangements will depend on your ability to plan and make appropriate arrangements beforehand.

According to popular perception, business travel is associated with some amount of stress. This is because business travellers need correctly planned itineraries and, at the same time, they have to prepare for meetings. However, business travel need not be stressful; on the contrary, it can be planned to be a pleasurable and satisfying experience for your boss.

FACT



UK companies increased their spend on business travel by 147% in 2022, according to recent research

6.2 Create your itinerary



This is the fundamental starting point for any business travel.

Firstly, you may need to find out exactly what your manager is planning for the trip.

The essential components of a business trip will include the objective of the meeting, planned visits to factories, offices or warehouses and proximity of the hotel to other facilities. These are some of the important questions that will help you plan hotel bookings, car rentals and so on.

It is always good to incorporate a certain level of flexibility in the trip so that you have the option of pencilling last minute changes, if required.

There are several variable factors that could influence the choice of hotel selection, transport choices and dining options, so it makes sense to begin planning after you have received the preliminary details from your boss.

Remember that business travel plans are often subject to fluctuation, so an organised and creative approach to last-minute changes is required to be a successful business travel planner.

A well-planned business trip can help your boss focus on their work instead of worrying about the travel arrangements.

Business Trip Itinerary

A well-planned itinerary can help maximise time spent travelling without overloading the schedule.

Here are a few business itinerary planning tips for business travel:

- Book two to three appointments well in advance in preference to overcrowding the agenda with too many meetings. Space out the appointments so that there is time for commuting and preparing for the next meeting.
- Before going ahead with hotel and car rental bookings, ask your boss for their schedule, preferences and time allocation (for example, they may prefer overnight travel to save on time).
- Check with your boss to see if their passports and visas are updated. This should be done at

least one month in advance of their travel so that their travel documents are updated.

The itinerary should contain updated details regarding flights, dates, car rentals, hotel bookings, along with confirmation numbers and phone contacts. Also, remember to include the travel agent's contact number, hotel addresses as well as addresses of the meeting venues.

If they are flying to a foreign destination, you may also wish to include extra details including dress code, tipping advice, etiquette tips and so on.

Activity 1 - Working with a Travel Itinerary

Estimated time: 10-15 minutes

Business travel is a vital part of your position as a personal assistant. There are several things that you must consider when you are planning a business trip.

A good place to start is with the travel itinerary, which is an essential component of your journey. Practise making your own itinerary. What are the first steps and what should be considered when planning this essential travel document?

6.3 Communication



Think about how your manager plans to communicate with people when on the business trip.

If they are travelling abroad there are multiple options for using a mobile phone. You may wish to upgrade their existing plan with the current provider to arrange a cheaper tariff. You need to ensure they are able to avail of competitive rates for international calls, data usage and texts.

If your manager does not plan to use the standard contact number, you could consider getting them a temporary SIM card. You can even use different SIM cards in the same phone if it caters to an open network. The phone will need to be unlocked to accept SIM cards from different regions or providers. Your phone provider will be able to provide you with more details.

You can also use the old fashioned method and go for prepaid call credit cards (companies usually prefer to use post-paid phone cards).

6.4 Check the times



PAs need to ensure that business travel arrangements run smoothly.

You should check for updates and changes in travel, flight, trains; this can be easily done using the internet and phone. In the event of poor weather, wind, ice and snow, double-check for delays and cancellations.

6.5 Buy refundable tickets



There is always a certain level of unpredictability associated with business travel.

The other party may postpone or cancel the arrangements or there could be changes in schedule from your side. Last minute cancellations can often result in loss. While it may not always be possible to avert these losses, you can opt to book refundable tickets instead.

If you buy refundable tickets you will lose lower amounts of money in the form of penalties. You also have the option of rescheduling at a later date with no hassle. Efficient business travel planning will help fortify your image as a competent organiser and planner.

6.6 Cross that checklist



A checklist is another simple yet powerful tool.

Create a list for everything - travel documents, meeting requirements, clothes, phone charger etc. Remind your boss of the checklist so that they have everything that they need for the trip.

A business travel checklist is different from a leisure travel list. As a PA, you can create one that can be shared with colleagues and bosses. They can refer to it before any travel or keep a copy for themselves.

Here are some important things to include:

Carry on luggage

This saves a lot of valuable time as you do not have to check in carry on luggage. Carry on luggage also minimises the risk of lost luggage; it can be extremely inconvenient to land without your clothing and attire just ahead of an important meeting.

Travel documents

Keep your passport (if required), ID card, VISA papers, business papers and documents, medical certificates, wallet, insurance, driving licence and booking confirmations handy.

If you handle travel for your boss, you may wish to send them a gentle reminder to check their travel list before leaving.

Activity 2 - Creating a Business Travel Checklist

Estimated time: 10-15 minutes

You previously created a travel itinerary and hopefully, you are now comfortable drafting this very important document. As you move forward in this next activity, you are going to work on creating a checklist, which is another critically important tool.

Create a checklist based on the information in your travel itinerary. Make sure you include everything that should be considered when flying. What should a business travel checklist include?

6.7 Transport Requirements

Airline Bookings

If your boss is flying, book their flights according to their preference. They may request morning or evening flights or may prefer travelling by overnight flights. Ask for more specific details like airline or seat preference. Some travellers prefer window while others prefer aisle seats to stretch their legs. Your boss may prefer a specific airline because they have their frequent flyer card.

As a PA, you may wish to note down the travel preferences of senior management and store them for future reference. Once you have made the bookings, always send the itinerary across to the person concerned if they are satisfied with the arrangement.

Keep in mind that large cities often have more than one airport. Make sure that you inform the boss of the airport details well in advance. Leave space in the schedule if he has to commute from one airport to another.

Car Rentals

Transport choices include public and private transport; the choice will depend on the nature of the business visit. Ask your boss if they would prefer to ride in a taxi, rent a car or hire a driver. They may prefer using taxis in certain places and private car rentals in others.

Check the local area and find out reputable vehicle rental companies. The size and type of vehicle would depend on the number of travellers and the distance to be traversed. Reputations and reviews are not hard to find these days so it should be simple enough to find a company that rates highly with regard to reviews. If you need a car from an airport, most can be picked up and left from the airport.

Consider the types of travel insurance that you may need for travel. Does the driver need a different licence? Coordinate with your boss and ask them the preferred type of car. Once you have the details like make, type, number of hours or days etc, you can then work out a budget for the trip.

It pays to remember that companies would usually prefer (or even insist on) using the best and most efficient car rentals. Quality and reliability should never take a back seat to price alone. When you book a car rental company, go for the most reputed ones.

Make sure that you provide your boss with the make and type of car, pick-up and drop-off times and locations as well as confirmation numbers of bookings done beforehand.

6.8 Hotel Booking



This part may sound quite easy, but check all listings online, compare prices and check on [booking.com](https://www.booking.com) or [laterooms.com](https://www.laterooms.com) for competitive prices and deals.

Reputed websites often offer excellent information and options for business travellers.

Popular hotel booking sites usually offer better prices compared to booking directly through the hotel.

Book a room that offers affordable cancellation options (preferably). The choice of hotel and the type of room will depend on the budget allocated to travel by your company. The choice may also vary according to the designation and seniority of the traveller.

It's also a good idea to familiarise yourself with the boss's personal preferences.

For example, they may prefer hotels that have a swimming pool or may opt for rooms that are located close to lifts/elevators.

Take a Quick Recap Test

[viralQuiz id=71]

6.9 Travel Expense Evaluation and Tracking



Corporate or business travel has a specific budget allocated.

The allocated expense will depend on company policy. The company will usually have specific rules and regulations regarding travel expenses.

For example, directors and senior management may be allowed business or first class travel, while subordinates may be allowed economy class. Similarly senior management may be allocated luxury or five star hotels. However, many companies are now trying to cut down on unnecessary travel expenditure and prefer their employees to use standard travel.

The travel arrangements that you make should follow general company policy while incorporating your boss's preferences at the same time.

Go and Practise

Estimated time: 20-30 minutes

Download the worksheet below and complete the travel itinerary/checklist

[Download Worksheet \(PDF\)](#)

[Download Worksheet \(Word\)](#)

Module summary

The underlying objective of business travel is to maximise the time spent on travel while achieving business goals at the same time. A well-planned trip can help your boss focus on tasks without worrying about the travel arrangements.

Your boss will need you to help with booking hotels and making business travel arrangements. A personal assistant performs the duty of organising hotels, travel, tickets and more.

You have learned the basics regarding how to plan a successful business trip. A checklist can help plan ahead of time. Successful business travel planning involves preparing a detailed itinerary, checking travel documentation, booking airlines/trains and car rentals and making suitable hotel bookings.

Business travel often involves changes and amendments in the schedule. It's preferable to plan in a way that allows you to incorporate last minute changes.

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