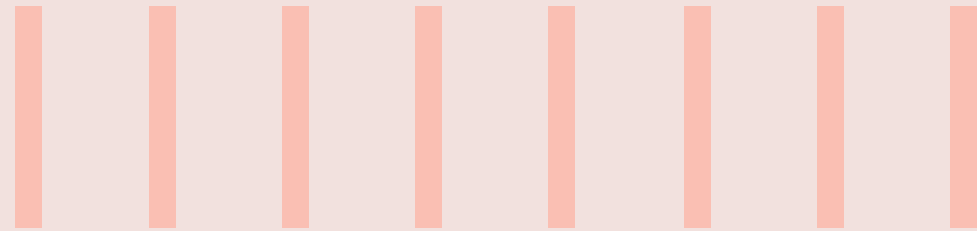# TRAVELLING TO A DIGITIZED DESTINATION

How digitization and automation helped streamline the travel program at a globally recognized university

Abstract

Infosys BPM partnered with its client to deploy digitization solutions that enhanced traveller satisfaction and reduced credit risks for the organization.

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A plethora of business travel challenges

Infosys BPM's client, a leading public research university based out of Australia, was facing multiple issues with regards to its travel program.

The staff was expected to fill-up to five different paper-based forms before each trip. Further, the travel management companies (TMC) contracted by the client were providing varied levels of service, and the online booking tool to engage with them was outdated. Because of various modifications to the tool over time, the booking process had become quite convoluted. Further, the information on the travel program was hosted across multiple pages of the company intranet, leading to a lack of clarity on policies and processes.

The payment processes were also scattered. Some staff used personal cards and others used corporate cards, and lack of adequate receipting resulted in delayed payments on personal card expenses and overall budget mismatches.

Implications for the organization

With all of these challenges, the client's travel program had low utilization rates of less than 30% of employees and traveller satisfaction ratings had plunged to 20%. Apart from the travellers, the cumbersome processes also raised several issues for stakeholders across the organization.

Stakeholders	Issues
Travel bookers	• Process unclear – most just did what they wanted • Process too long and cumbersome • Different service levels from the TMCs • Using online providers for bookings with little to no service in case of changes or emergencies
Risk & Insurance	• Travellers going to many high-risk destinations with little knowledge of what to do in case of trouble • No record of staff whereabouts – impact to duty of care • Ongoing insurance and risk complications due to lack of information going to travellers
Management	• No reporting on travel spend - at senior levels or at business unit level • No understanding of travel behaviours or ways to gain value for money • Manual record keeping, de-centralised within business units • Delegation authority not clear • Many forms and checklists not completed or completed after travel
Finance	• Tax implications as limited travel diary and FBT information capture • Lack of granular data so no understanding of travel spends or patterns • Cumbersome processes to claim and reimburse travel costs and per diems / advance allowances • Lack of timely reconciliation leading to overdrawn budgets for projects • Minimal audit controls – people claiming per diems and also claiming expenses • No understanding of what was appropriate spend
Procurement	• No reporting on supplier spend leading to inability to negotiate with key vendors properly • Unable to provide any category management opportunities
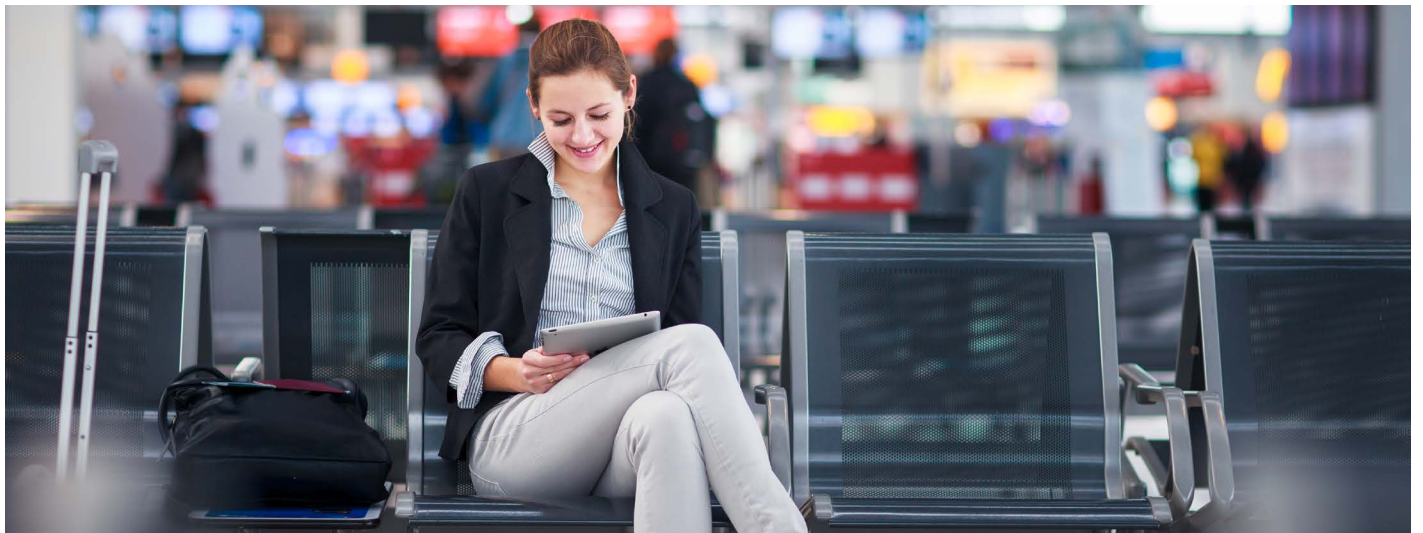
As the client struggled to overcome these challenges, it needed a partner who could streamline its travel program and improve payment reconciliations through a centralized system. Infosys BPM, an organization with advanced digital transformation and process alignment capabilities, was the perfect partner for the company.
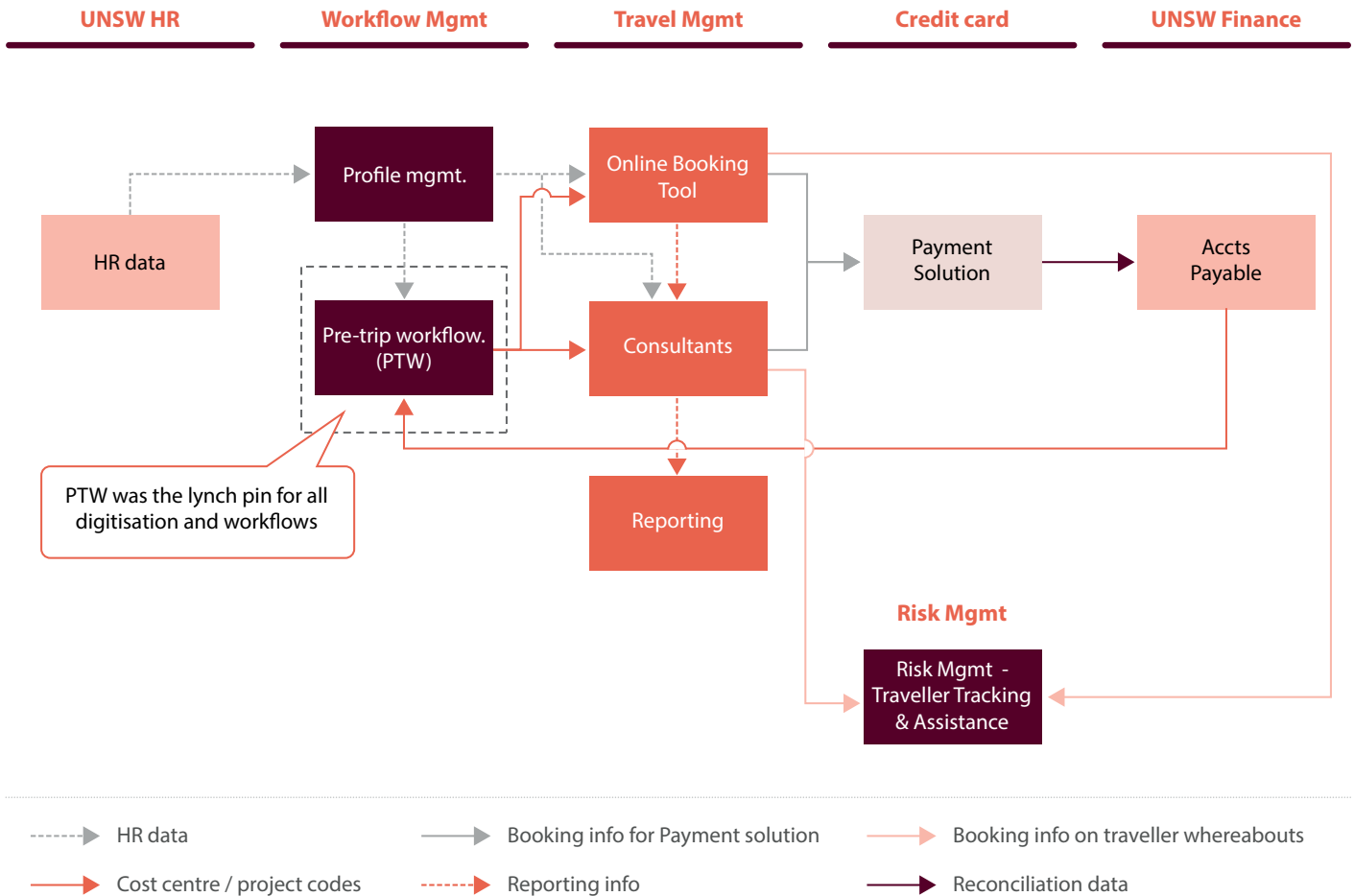
A new framework for the change journey

The Infosys BPM team digitized and integrated the travel processes of the client end-to-end. With the new system, all data flowed through the different systems electronically and travellers were spared the earlier hassles of re-keying information from one system to another.

Travel technologies – E2E integration

Key fundamental of the new program was to digitise much of the process and integrate the key steps

UNSW HR	Workflow Mgmt	Travel Mgmt	Credit card	UNSW Finance

HR data

Profile mgmt.

Pre-trip workflow. (PTW)

PTW was the lynch pin for all digitisation and workflows

Online Booking Tool

Consultants

Reporting

Payment Solution

Accts Payable

Risk Mgmt

Risk Mgmt - Traveller Tracking & Assistance

Legend:
- - - - - ▶ HR data
- ──────▶ Booking info for Payment solution
- ──────▶ Booking info on traveller whereabouts
- ──────▶ Cost centre / project codes
- - - - - ▶ Reporting info
- ──────▶ Reconciliation data

Comments

All data flowed from the different systems electronically

Travellers did not need to re-key information from one system to another

Pre-trip Workflow contained
- electronic versions of previous manual forms
- inbuilt policy guidelines and delegations
- cost coding and reconciliation information needed for accts payable

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The team also created a centralized payment card solution that improved data granularity and directly linked all payment related processes to the accounts payable system. Now, all payment card data could be processed daily by automated systems, keeping the budgets up-to-date and removing the dependency on manual form-filling and record keeping.

A seamless, redesigned workflow

The new system reorganized the entire pre-trip workflow to completely automate approvals, delegations, trip planning, and financial reconciliations. Key features included auto-population of forms with traveller data including information needed for reporting and approvals. Pop-up windows were used to request additional travel specific data. Depending on domestic or international travel, the necessary information would be automatically passed on to the online booking tool or travel consultants. In case of high-risk destinations, the booking would be routed to the risk team for assessment. Other features included automatic travel diary prompts, automated calculations for per diems, and the ability to split costs over multiple projects.
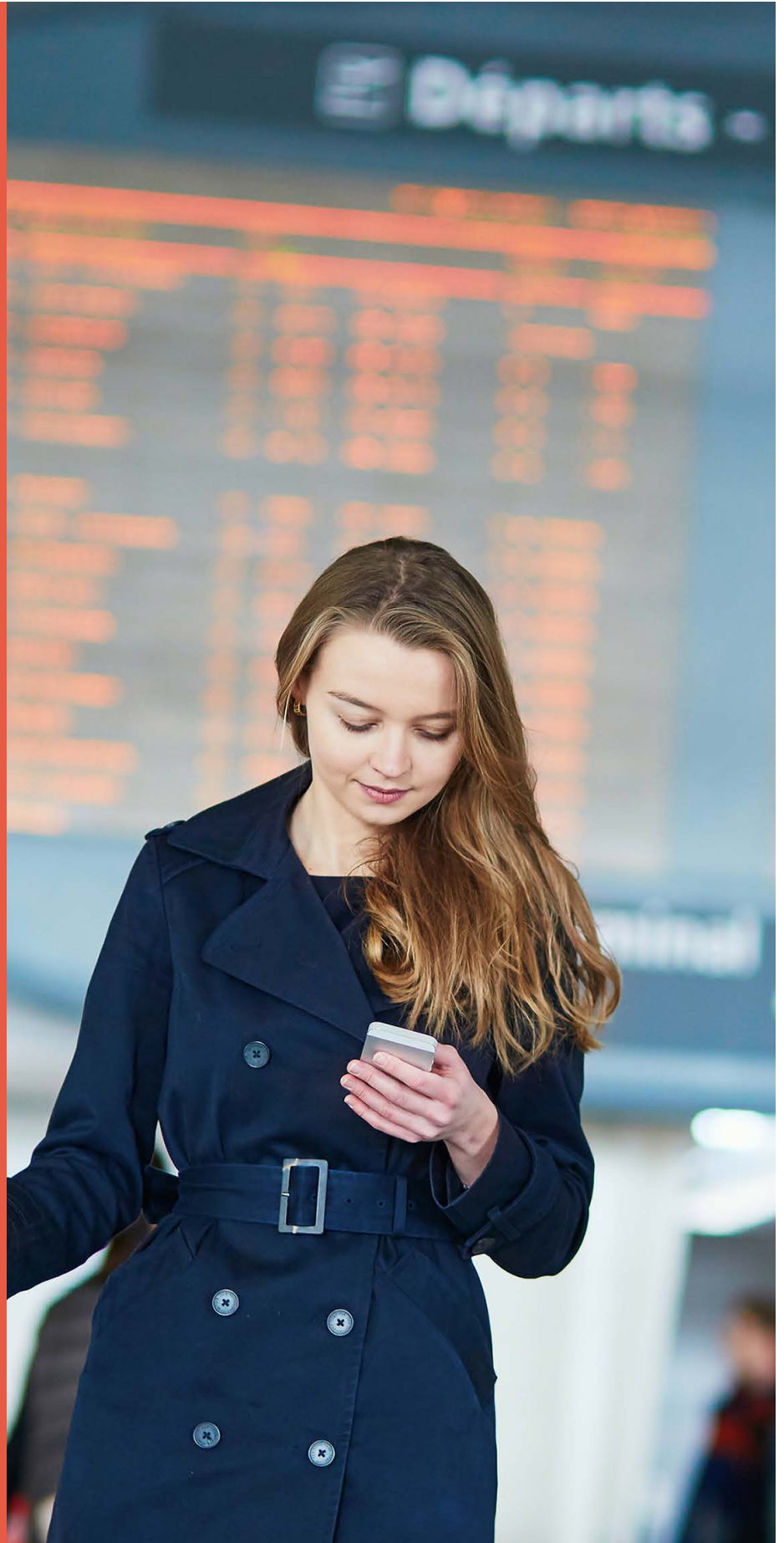
Hassle-free travel and other outcomes

Infosys BPM's automated solution ensured that the travellers had a hassle-free experience during and after booking their trips. The stakeholders across the client organization gained several other benefits as well.

With the daily feed from the payment solution into the accounts payable process, budget owners were able to manage project funds better due to minimized instances of late reconciliations. This also freed up the accounts payable staff from cleaning up late reconciliations, miscoded transactions, and other errors caused by the earlier manual intensive processes.

The data provided by the new system enabled reduction of corporate card limits and thereby lessened credit risk. The reduced probability of staff claiming costs more than once helped enhance fraud management. Finally, the new system ensured better compliance to the travel program as questions could be raised with the travellers in case their charges were not reflected in the system.

The bottom-line? Whether it be a real-life journey or an organizational journey of transformation, an experienced and capable travel procurement and operational partner can greatly enhance the experience and outcomes.

For more information, contact infosysbpm@infosys.com

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