INVESTIGATING BUSINESS TRAVEL PROCESS MANAGEMENT WITHIN ORGANISATIONS

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ABSTRACT

Transport is an important component in a nation's development, and so a poorly planned transport system can cause major economic, social and environmental problems. This is the case for countries and so too for organisations. In particular, for several types of organisational travel in the course of work, i.e. business or corporate travel, this is generally the second or third largest controllable cost and can be a significant cost, so this obviously directly influences balance sheets. As a result, a major challenge is how to reduce these costs. There is, however, a risk that such actions may adversely impact on the overall performance of the implementing organisations if an appropriate method is not employed. In terms of a research gap, it appears from previous work that there is a lack of understanding of the benefits and barriers related to organisational business travel and a lack of qualitative research on the impact of business travel on organisational processes. Accordingly, this research investigates the process implications of business travel within organisations. It does so by exploring issues related to business travel in order to assess the extent to which organisations can manage their business travel effectively in the current economic climate. Specifically, the aim of the research is to investigate the process implications of business travel within organisations with a view to improving travel practices. This research reports the results of the literature review, fifteen expert interviews, an organisational survey of business travel practices in 41 UK organisations and three in-depth case studies. On the basis of these results, the research developed a business travel process management framework (BTPMF). The framework is a comprehensive manual of how to manage the business travel within an organisation. It is specifically designed to be of use to a number of the many of the stakeholders involved in the process, namely: policy makers, strategic administrators, line managers, travellers and the framework is also useful for external factors involved in the process, such as travel management companies. This research established the definition, as well as the characteristics, motivations, and issues related to business travel. The research also investigated the actual practices of business travel management at both the strategic and implementation levels. The research emphasised the need for organisations to collaborate well with business travellers and business travel process management teams to achieve better implementation outcomes. The research findings help to

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LIST OF ACRONYMS

ACTE: Association of Corporate Travel Executives
AMAP: Authorised Mileage Allowance Payments
BPM: Business Process Modelling
BTPM: Business Travel Process Management
BTPMF: Business Travel Process Management Framework
CPN: Coloured Petri-Net
CSR: Corporate Social Responsibility
GDP: Gross Domestic Product
GHG: Greenhouse Gas
GIS: Geographic Information System
GTAG: Global Travel Advisory Group
HR: Human Resources
HS2: High Speed 2 (UK Rail Route Proposal)
ICT: Information and Communication Technologies
IDEF: Icam DEFinition for Function Modelling
IT: Information Technology
KPI: Key Performance Indicators
NBTA: National Business Travel Association
NBTN: National Business Travel Network
OBS: Online Booking Software
ONS: Office for National Statistics (Great Britain)
RAD: Role Activity Diagram
RID: Role Interaction Diagram
ROI: Return of Investment
SAP: Systems Application Programme
TEM: Travel, Entertainment and Meeting
TfL: Transport for London
TMC: Travel Management Company
TP: Travel Plan

CHAPTER ONE

INTRODUCTION

1.1 INTRODUCTION

Transport is considered to be one of the most important components of the economic development of a nation (Sim *et al.*, 2001). An unplanned transport system may cause major environmental disruptions along with social and economic problems (Eddington, 2006). From a business perspective too, the transport problem is one of the biggest barriers for all types of business organisations to improve their business (Sussman, 2000). In particular, the high economic, environmental and social costs of business travel are a major concern for many organisations and consequently a major challenge is how to reduce such costs (Aguileria, 2008). However, there is a possibility that excessive business travel (US Travel Association, 2013) may have an adverse impact on the overall performance of an organisation, if an appropriate method is not employed to decide whether a business trip is beneficial to undertake (Deborah, 2014; Gustafson, 2013). Despite this, current practices are relatively rudimentary and there has been a recognised dearth of academic literature in this area (Aguilera, 2008; Faulconbridge, 2009; Dudley, 2010). This thesis aims to help address this.

This chapter presents an overview of the research project and its context. It presents the background of the research, defines the problem statement and states the aim and objectives of the research. This chapter also includes the structure of this thesis.

1.2 THE ROLE OF BUSINESS TRAVEL AND BUSINESS TRAVEL PROCESS MANAGEMENT

Business travel can be defined as being travel in the course of work. Specifically, it includes journeys made by employees of an organisation (e.g. to meet suppliers, clients or colleagues at other sites) but does not incorporate freight, leisure, commuting or so called 'personal business' trips (e.g. trips to the dentist or the bank during lunch time) (Snepenger and Milnee, 1990; Douglas and Lubbe, 2006; and Aguilera, 2008). There are two types of business travel, one is domestic business travel and the other is international business travel. According to Faulconbridge *et al.,*

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2009 (p. 295), *"international business travel needs to be studied not in isolation but instead as one component in a wider ecology of mobility which produces the global firm"*.

In terms of benefits, business travel is deemed as being necessary because it presents opportunities to create jobs, encourages the injection of inward investment, generates tax revenue for local and central governments and brings new ideas into local business communities (Swarbrooke and Horner, 2001). On the other hand, business travel can also have negative impacts on society. In particular, the modes most often used for business travel (i.e. car, air and rail) use valuable resources, create pollution and often destroy natural habitats (Swarbrooke and Horner, 2001). In recent years the expanded markets, global production chains, deregulation in the airline industry and growing numbers of geographically dispersed multi-unit companies have increased the need for face-to-face meetings (Gustafson, 2013; Beaverstock *et al.,* 2010). Beaverstock *et al.,* (2010) also mentioned that face-to-face meetings are the most effective way of communicating with colleagues to share knowledge, build trust and to get immediate feedback.

In terms of business travel process management it can be said that it is not an easy task, as business travel involves several different stakeholders with different interests to defend (Gustafson, 2012). The business environment has added layers of processes to control business travel. There are many stakeholders involved, each with a valid interest in the company travel programme. These stakeholders include: finance, procurement, information technology (IT), individual travellers, business users, human resource (HR)/travel managers and legal and executives. To explain business travel process management, Gustafson (2012) also mentioned that in this process a travel manager has to manage relationship with the travellers, communicate with the decision-makers in the own organisation and liaise with suppliers and travel management companies. Various empirical researchers indicate that there is a positive correlation between process management and business success (Trkman, 2010; Skerlavaj *et al.*, 2007; McCormack and Johnson, 2001). So for the business organisations managing the business travel process efficiently have a positive impact on both revenue and profitability (US Travel Association, 2013).

1.3 PROBLEM STATEMENT

In quantifying the effects at the societal level, UK data for 2010 (DfT, 2010) revealed that while business travel accounted for only 3% of all surface and domestic air travel trips made by individuals, it made up of 9% of all passenger distance travelled. Moreover, business travel trips are typically made by the most unsustainable modes like air and car, thus 78% was by car, 6% by domestic air, 4% by bus, 4% by rail and 7% by walking and 1% by bicycle. In addition, business trips made up 13% of international air travel journeys from UK airports (DfT, 2010). Even though the rate of international business trips by air in the UK is not high, however the study of business travel is important for its impacts on society. Taking a global perspective, business travel has improved global productivity and elevated a rate of investment of 10:1. International business travel has created approximately one third of the growth in global trade over the last decade. Over 40 million jobs emerged by the multiplier effects of international business travel through higher productivity between 2000 and 2007 (World Travel and Tourism Council, 2011; Beaverstock and Budd, 2013). However, there is some down side of business travel that has impacted on society, as while calculating the total business travel expenses, the organisations give priority to the business mileage, travel by train, taxi fares, international travel by air and hotel costs; yet the business travel cost related social health and environment are largely not accounted for (Roby, 2014). In major cities where transport networks are most congested, it forms a higher proportion of business trips, therefore new government policies are needed to reduce carbon emissions, while undertaking business travel and to find CSR reports from the organisation (Roby, 2014, Lyons, 2013). According to Lyons (2013, p.50), transport policy and business travel practices face "*challenges to addressing a radically changed economic landscape, pressing environmental issues, and managing the demand for travel. They also face the opportunity of the information age in terms of new ways of transacting that may hold the promise of reducing or reshaping the amount of business travel that takes place*".

Accommodation, activities at the destination and transportation are the key element of business tourism (Becken *et al.*, 2003) which generates most of its greenhouse gas emissions (Byrnes and Warnken, 2006). In 2013, 14% of international tourists reported travelling for business and professional purpose, 52% for holiday purposes, 27% for other reasons (i.e. religion) and 7% of arrivals were not specified (UNWTO, 2014).

Business tourism is a vector of climate change; however, any strong global emission policy for aviation would have considerable consequences for destination-dependent business tourism and travel (UNWTO, 2014).

From an organisational perspective, the cost of business trips is also significant. Data reported by the US Travel Answer sheet (2014), shows that US organisations spent $USD 266.5 billion in 2014. In the UK, according to Global Expenses (2009) data from 150.000 UK-based employees made expense claims of £GBP 3.5 billion (Global Expenses, 2009), while small and medium enterprises in the UK spend £GBP 2.5 billion ($USD 4.2 billion) on business travel annually, and that companies waste up to £GBP 0.5 billion ($USD 0.8 billion) , apparently because they are not aware of how to get the best deals in terms of whether a trip is essential and using poor booking mechanisms (Business Travel Show, 2009).

These collective facts and figures highlight the need to investigate business travel practices so issues can be better understood and recommendations made to better manage business travel processes within organisations. This forms the primary focus of this research.

Similarly, according to Ramsey (2011, p.22), "*despite the growing need for business travel, budget cuts implemented due to the world financial crisis that began in the fourth quarter of 2008 are forcing firms to rethink how they maximize the efficiency of travel*". Inefficient business travel cannot improve global corporate productivity, and if business travel were cut by 25% over two consecutive years then this would cause an average loss of 1% of global employment (Oxford Economics Business Travel, 2010).

Business travel is a vital element of business success as Lyons, (2013) mentioned that business travel often reaches beyond sharing knowledge. Also, according to Faulconbridge *et al.,* (2009), the trust building via business travel actually minimises the future need for travel. However, the organisation's policy makers, tend to ignore the need for properly managing business travel and instead have focused on competition, regulation, taxation, the state of the economy and related problems of staff and finance (Lyons *et al.,* 2009).

Morrison *et al.,* (1994), Aguilera, (2008) and Beaverstock *et al.,* (2010) explained a lack of attention is reflected in terms of research about work-life balance after

undertaking business travel and sustainable travel. It is also necessary to have sector specific research (Beaverstock *et al.*, 2010), as to which sectors of the economy has more impact on the business travel, public or private sectors and different business sectors that's contribute to the GDP (Dudley, 2010) Moreover, the studies that have been done have predominantly been conducted by management consultants on a consultancy basis, whilst the topic has been largely ignored by the academic community (Morrison *et al.,* 1994; Gustafson, 2012). In particular, there appears to be little understanding of how organisations typically go about organising business travel and of the benefits and barriers related to organisational business travel (Gustafson, 2012) as well as a lack of evidence on the impact of business travel on the organisational process. Therefore, organisations are facing several problems when managing business travel; however there are no structured processes to follow, and travel management today requires higher levels of management care Gustafson, 2012). Time is another issue for managing business travel. However, there is more to this complexity than just the amount and time and cost of travel. With many stakeholders and variety of distribution channels it is necessary to simplify the business travel process. A 'framework' is needed that can train/guide not only the travellers but also the travel management team, in thinking about the business travel management process. Accordingly, this research presents the conceptual business travel process management (BTPM) framework to help address these gaps.

1.4 RESEARCH AIM AND OBJECTIVES

The aim of the research is to investigate the process implications of business travel within organisations with a view to improving travel practices. To achieve the research aim five objectives are formulated as follows:

1. To review the business travel sector and identify the issues, processes and impacts within it;

2. To examine the effect of organisational process on business travel;

3. To develop a framework to improve the efficiency and effectiveness of organisational business travel processes within organisations;

4. To evaluate the effectiveness of the proposed framework in delivering business travel; and

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5. To derive recommendations for practice and policy.

1.5 RESEARCH SCOPE

This research focuses on business travel process management in organisations, specifically the strategic implementations of business travel in large and medium sized organisations in different business sectors. Large organisations contain more than 250 employees (European Union, 2003) and substantial gross income, gross profit, can be local, regional, state based, national or global and can operate using single or multiple factories, brunches or sites (Somers *et al.*, 2011). Medium organisations contain a staff of up to 250 persons and a turnover of up to $50 million or a balance sheet up to $43 million but not necessarily both (Europen Union, 2003; Peterakis and Kostis, 2012). The business sectors that contribute on national GDP (ONS, 2010) are:

1. Financial intermediation, real estate, renting and business activities (32.4%);
2. Wholesale and retail trade, repairs, hotels and restaurants (14.2%);
3. Education, health and social work (13.1%);
4. Manufacturing (11.6%);
5. Transport, storage and communication (7.1%);
6. Construction (6.2%);
7. Other services (5.1%);
8. Public administration, national defence and compulsory social security (5.0%);
9. Mining and quarrying (2.9%);
10. Electricity, gas and water supply (1.6%); and
11. Agriculture, hunting, forestry and fishing (0.7%).

The investigation of business travel process management in this research was carried out in above eleven business sectors that contribute in GDP. Implementation is considered at the organisational level because: 1) Different stakeholders related to business travel in an organisation need to follow the policy and need a structured method to design and manage business travel; 2) The framework that has been developed in this research is measured through whether or not it can fulfil the organisation's goal; and 3) Organisations need to focus on the holistic approach of business travel.

This research identified the current issues and impacts related to business travel process management in the organisations and created a holistic approach to enable the

process to improve. The holistic approach can help organisations to consider business travel process management in the long-term and measure the effectiveness of the framework through determining alignment with an organisation's goal. The research includes findings of 1) A literature review of business travel (Chapter Two); 2) A scoping study (Chapter Four); A questionnaire survey of sector specific business organisations (Chapter Five); 3) Three case studies of large and medium organisations of three sectors (Chapters Six, Seven and Eight); 4) The development of conceptual (BTPM) framework to manage and review the business travel by the organisations (Chapter Nine); and 5) The evaluation of the framework (Chapter Ten).

1.6 OVERARCHING RESEARCH METHODOLOGY

In order to achieve the prime aim of the current research as identified in section 1.4, a multi-methodological research design was adopted to take account of the organisational context and investigate the current processes and issues related to business travel process management. A mixed-methods approach, combining both quantitative and qualitative approaches for data collection and analysis (Robson, 2002), was identified as the most suitable strategy for the current research, and subsequently applied. This was for pragmatic reasons – whereby pragmatism is the contentious issue of truth and reality, aspects, philosophically, that are open to empirical inquiry and orients itself towards solving practical problems in the real world (Creswell and Plano Clark, 2007). Note, a more comprehensive account of the adopted research methods has been included in Chapter Three.

The review of business travel literature helped to identify research questions and also helped to outline the methodology in studying and analysing business travel process management in organisations.

The research design as shown in Figure 1.1 was conceived in accordance with the research aim and objectives and consists of six stages. Stage one reviewed the business travel literature and identified research gaps. Stage two explored more insights on business travel scope and the issues and impact related to business travel along with some future opportunities for organisational business travel. Stage three derived a broader perspective of current practices of business travel in UK organisations by an organisational survey. Stage four was an in-depth examination of business travel management practices in organisations. Stage five developed a

conceptual business travel process management (BTPM) framework (see Section 1.7 for the definition of framework) based on outputs analysed from previous stages. A holistic approach was developed for organisations to control and run the business travel processes. Stage six evaluated the effectiveness of the proposed conceptual (BTPM) framework with selected organisation practitioners and academics. In stage six the benefits and limitations of the conceptual (BTPM) framework were summarised for future development and the results contribute to the recommendations and conclusions of the current research. Figure 1.1 outlines the research design in terms of the adopted research stages, the conducted research programme and delivered research outcome.

Research Stage	Research Programme	Research Outcome

Literature Review Stage 1
- An overview of definition, motivation, characteristics, scope, issues, outcome and future opportunities of business travel; and
- A review of previous research on business travel.

- Establish research questions, aim and objectives; and
- Establish research design, research approach/ methodology.

Expert Interviews Stage 2
- Analyse results using a thematic approach. Thematic approach relies on central theme to guide, development of an activity(William, 1980). In this stage the themes were finding the definition, significance, characteristics, issues and future related to business travel from the interview results. .

- Establish the scope of the research; and
- Justify the reason for selecting methods.

Organisational Survey Stage 3
- A questionnaire survey in sector specific business organisations; and
- Descriptive analysis Microsoft excel.

- Understanding of current process and issues related to business travel

Case Studies Stage 4
- Documentary analysis of policy documents, business travel process related documents.
- Semi structured interviews with the stakeholders related to the business travel; and
- Analysis of results with IDEF0 method (see Chapter Three for the definition) and thematic approach.

- Assess the possiblee issues related to business travel process management and identify the solutions.

Framework Development Stage 5
- Combined all results, issues, barriers that found through the research;
- Develop an IDEF0 model; and
- Develop BTPM Framework.

- Establish a holistic approach to manage the business travel process.

Framework Evaluation Stage 6
- Structured interviews with Strategic Administrators (Business development Managers, CEO, Travel Managers) and Academics (Transport Research, Process Management)
- Interview Analysis

- Verify the Business Travel Process Management Framework
- Set Recommendations for future development

Recommendations and Conclusions

Figure 1.1 Research Design.

1.7 DEFINITION OF CONCEPTUAL BUSINESS TRAVEL PROCESS MANAGEMENT (BTPM) FRAMEWORK AND RATIONALE

From the Oxford dictionary definition 'framework' is a basic structure underlying a system, concept or text. According to Engels *et al.*, 2004, the framework is a thinking tool to guide systematic assessments of vulnerability and to provide a basis for relative indicators and criteria development to access key factors. There are various types of frameworks that can be used in academia, business organisations and for the government. These are: architecture framework, conceptual framework, software framework and legal framework. The term framework is different from the terms 'system', 'model' or travel plan'. The differences are described below:

Table 1.1 Reason for using the term 'Framework' in this thesis

	Definition	Conceptual thinking for the reason not to use the terms 'system', 'model' and 'travel plan' in the thesis. Also the reason for using the term 'Framework'.
System	A set of connected things or parts forming a complex whole in particular. System are organized towards achieving a goal (Grady, 2010)	A system is a set of principles according to which something is done, an organised scheme or method. A framework is a basic structure that underlines one or more systems. For this research framework was needed to form a methodology that can control and embrace all the business travel process management systems in one umbrella.
Model	"A model is a simplified representation of a part of the real world" (Ortuzar and	A model is a standard or example for imitation or comparison. Models can be representations that generally miniaturise to show the construction or appearance of something. On the other hand, frameworks can elaborate their contents and are

	Willumsen, (2001); pp.2).	changeable or alterable without changing the root or main concept of the framework. For the thesis a method was needed to elaborate and explain every single process of the business travel and at the same time to keep the opportunity to alter it.
Travel Plan	"A travel plan is a mechanism for delivering a package of transport measures targeted at a specific site by an agent with a strong relationship with the local transport users to deliver transport and wider goals to the organisation and society as a whole" (Enoch, 2012; pp.35).	The framework has its own structure and the travel plan could apply as points or part of the framework. In the thesis, the framework has four phases and each phase identifies, develops and applies the business travel plans as needed.

For this research a conceptual framework was needed to be developed to overarch a methodology on business process management for the organisations. To define the conceptual framework Ravitch and Riggan (2012) mentioned thatthe purpose of a conceptual framework is to learn from the experience and expertise of others. A conceptual framework guides the ways to think about collecting, analysing, describing and interpreting information. The conceptual framework helps to conceptualise and articulate the reason or rationale for the investigation, as well as supports to determine the methodological rigor.

Business travel process management (BTPM) is professionally managed travel activities of an organisation by the travel managers (Gustafson, 2012). More specifically, business travel process management is the organisation's activities to implement policies,

regulations and standardise routines for business travel and its stakeholders (Jenkins, 1993; Lubbe, 2003; Gustafson, 2012). The proposed conceptual (BTPM) framework constitutes of the four phases (agenda setting, process formulation, process implementation and evaluation, Fischer *et al*., 2007) and is designed in a way that in its first stage it collects the issues and highlights the agendas needed to be set for business travel process management. In its second stage it analyses and formulates the needed business travel processes. In its third stage it implements the process and describes to the traveller the system and in its fourth evaluation stage the organisation interprets the current issues and identifies possible solutions. This framework clearly defines each step of the process and explains which job role needs to be involved in which stage. The combined four phases represent the structured methodology for the business travel process management in organisations.

1.8 GUIDE TO THESIS

This thesis is organised into eleven chapters. The main contents of each chapter are as follows:

Chapter 2: Literature Review

This chapter reviews literature on business travel, including a discussion on context, issues, outcomes and the future of business travel. The chapter explores the previous research on business travel. It describes the importance of a structured business travel process management system.

Chapter 3: Research Methodology

This chapter introduces the methodological consideration of the current research. It discusses the philosophical stance, research approaches and research strategies. The applied research methods are justified and described according to how they have helped to achieve the research objectives defined in section 1.4.

Chapter 4: Scoping Study

This chapter investigates the views and opinions of experts in the business travel field. The experts selected come from a range of backgrounds and expertise and include

academics, travel consultants, business travel planners and a leading business travel magazine editor who deals with the current business travel issues.

Chapter 5: Survey

This chapter introduces the background, aims, objectives and scope of the questionnaire survey that was conducted with travel managers and CEOs of 41 UK organisations in a range of sectors. The chapter also presents the findings and analysis of the survey. Specifically, the chapter discusses the survey outputs and addresses the comments of survey respondents to assess the understanding of current business travel processes, outputs of business travel and issues related to business travel in survey organisations. It also identifies the factors influencing the business travel and future opportunities of business travel.

Chapter 6 Case Study One

Educational organisations have contribution to the GDP as any business organisations in different sectors. This chapter presents the findings and analysis of business travel management practices of a large educational organisation that undertakes a large amount of business travel for conferences, training and meetings. This chapter reviews a range of documentary evidence and draws on interviews with five interviewees from different job roles who are involved with managing business travel (policy makers, strategic administrators and tactical administrators) and three travellers (academics) who undertake business travel from this organisation. It describes the processes, issues and impact related to business travel management in this organisation.

Chapter 7 Case Study Two

This chapter presents the findings and analysis of a large manufacturing organisation's business travel management practices. The chapter reviews documentary evidence and reports the results of eight interviewees from different job roles that are involved with business travel management including three travellers in this organisation.

Chapter 8 Case Study Three

This chapter outlines the findings and analysis of a medium service organisation's business travel management practices. Again, the chapter reviews documentary evidence and reports the results of eight interviewees from different job roles that are involved with business travel including three travellers in this organisation.

Chapter 9: Framework Development

This chapter reviews, discusses and presents how the conceptual (BTPM) framework was established. Specifically it discusses the conceptual (BTPM) framework development process, starting with its design and followed by a description of the framework. It then presents and discusses its main features and content.

Chapter 10: Evaluation of the Framework

This chapter presents an evaluation of the conceptual (BTPM) framework. It starts with an introduction, aim and objectives of the evaluation. Then the evaluation process is discussed. This is followed by a discussion of the results and findings from the evaluation. The benefits and limitations of the framework are presented in the final part of the chapter.

Chapter 11: Conclusion and Recommendations

This chapter summarises the conclusions, contributions and recommendations of the current study. The chapter draws conclusions relating to how the research aim and each of the objectives were addressed and achieved. It provides recommendations for how organisations can manage the business travel process efficiently and effectively and about how the current process can be improved. This chapter also proposes future areas of research based on the current study.

CHAPTER TWO

LITERATURE REVIEW

2.1 INTRODUCTION

This chapter provides a review of the available literature on business travel and on related work regarding improving business travel process management in organisations. The literature review serves three purposes: 1) to identify the limitations and gaps in prior research, 2) to determine research questions, and 3) to determine the methodological considerations for investigating the gaps. To meet these purposes, this chapter is broken into a number of sections. Section 2.2 presents the process of business travel; Section 2.3 defines the business travel process management (BTPM); 2.4 discusses the outcomes of business travel; 2.5 outlines the future of business travel; Section 2.6 outlines the research areas for further investigation; Section; 2.7 concludes the chapter.

2.2 PROCESS OF BUSINESS TRAVEL

2.2.1 Defining 'Business'

Before defining the term 'business travel', it is important to understand what the term 'business' actually means. In this section, some definitions of 'business' are therefore highlighted. These definitions are related to all private and public sector businesses. To look back at previous definition of the term 'business', a seminal quote by Wheeler and Adams (1973, p.3) is useful. According to them, in the 19th century business was defined as a special kind of work, done to create wealth for the utilisation of money and to satisfy the wants and needs of others. Wheeler and Adams (1973, p.3) also pointed out that people do business to 'survive' and more so to attain *"the good life."* Two years later, Buzzel *et al.,* (1975) noted that once the primary decisions about the objectives of a business have been made, then over time marketing, manufacturing, research, technological development and other functional plans follow. Abell (1980) then re-defined business as a three-dimensional space consisting of customer groups served, customer needs served and technologies employed or ways used to satisfy needs. Technological development, economical

aspects and social aspects are therefore the three most important features of the term 'business'.

More recently, Needle (2004, p.2) defined business as, *"the organised effort of individuals to produce and provide goods and services to meet the needs of society."* Needle also suggested that a business can either be profit making or non-profit making. Examples of profit making concerns are manufacturing firms and banks, while non-profit making examples include schools, charities and hospitals. This definition shows the economic aspects of business. However, business can also be defined by focusing on the relationship between business organisations and their environment. Thus, Palmer and Hartly (2005) defined business organisations in the following manner: Business organisations are involved in the basic activity, namely, the transformation of input (resources) in to outputs (goods or services). In essence, "*All organisations acquire resources including labour, premises, technology, finance, materials- and transform these resources into the goods or services required by their customers*" (Palmer and Hartly, 2005, p.4). It is evident that there are a range of definitions of business depending on the perspective adopted. However, business is fundamentally about carrying out a range of activities to deliver value to the customer, be it through improved services, products or business relationships.

In summary it can be said that business is the activity of buying and selling commodities, products, and services. Every business requires some form of investment and enough customers to whom its output can be sold on a consistent basis in order to make profit. Business can occur in the private or public sector of the economy, which can be profitable or non-profitable tasks that fulfil the needs of the society by providing various services.

2.2.2 Definition and Scope of Business Travel

Business travel may mean different concepts for different business sizes: small, medium and large corporate businesses. Swarbrooke and Horner (2001) noted that business travel is the practice of employees travelling for purposes associated with their work (i.e. the mobility of business travellers from place 'A' to place 'B'). Douglas and Lubbe (2006) stated that business travel can be broadly defined as all travel undertaken for the purpose of conducting business. According to Aguilera

(2008, p.1109) business travel is, *"work-related travel to an irregular place of work (for example: to visit a client, participate in a conference or attend a meeting)."* Mason (2000) defined business travel as anything related to travel for the purpose of the company and its business benefit. Mason (2000) added that although commuting, freight and fleet management are recognised as being travel management functions, they are not considered to be business travel as these types of travel are not directly aimed at delivering business benefits. According to Welch *et al.,* (2007), business travel also enhances personal career paths and brings much job satisfaction and variety to the working week.

Swarbrooke and Horner (2001) presented a list of the major types of business travel: individual general business trips; government employees travelling in the service of the state; short-term migration for employment product launches, exhibitions and trade fairs; training courses; major international congresses and conventions, local, regional and national meetings and conferences and many others.

KDS (2009) surveyed the options of 435 business travellers around the world to see how their travel behaviour had changed as a result of recession. The KDS (2009) survey took place among companies of all sizes from different business sectors: 29% with 1 to 500 employees, 23% from 500 to 5,000 employees, 10% with 5,000 to 10,000 employees and 38% from companies with more than 10,000 employees. As for how often they travelled, 34% made 1-5 trips a year, 15% 5-10 trips a year, 21% 10-20 times a year, 11% 20-30 times a year and 15% more than 30 times a year. The report did not mention which specific sectors of business participated in the survey; however the results found different types of business travel that the business organisations undertook. This list is shown in Table 2.1 in order of the proportion of business travel trips undertaken (KDS, 2009).

Table 2.1 Types of Business Travel and Proportion of Business Travel Trips Undertaken (Source: KDS, 2009 a).

Types of Business Travel		Description	Proportion of business travel trips undertaken	Comment
Meeting clients/ Suppliers	Commercial	Sales and Marketing	45%	Build relations with other organisations and suppliers.
	Customer support trips	Exhibition and trade fairs	21%	Build relations with customers.
	Conferences	Educational and business related conferences	20%	This type of travel also includes presentation visits. In the year 2000 the total estimation was £6.6 billion; in the year 2001 it was £7.3 billion, so it increased 10% over this period (Business tourism briefing, 2003).
Internal organisation trips	Internal	Internal company meetings	10%	Improve team work and business goodwill.
	Training	Training held inside or outside of the organisation. Intensive travel, outdoor events	4%	Improve employee skills; gradual change in motivational practices within certain businesses.

According to Wickham and Vecchi (2008), business travel is not undertaken only for the purposes of face-to-face contacts in both the industrial and services sectors. Some trips are also undertaken for the purposes of diagnosis, maintenance, repair and delivery. From the above discussion the scope of business travel emerges. The scope of business travel can be represented as shown in Figure 2.1. Firstly, business travel refers to passenger travel and not freight or goods travel. Secondly, business travel must be undertaken by the employees of an organisation and not by outsiders, e.g. visitors or customers. Thirdly, business travel trips are made for the benefit of the organisation rather than of the individual. Fourthly, business travel trips exclude home to work journeys which do not comply with the above conditions as these are typically categorised separately as commuting trips.
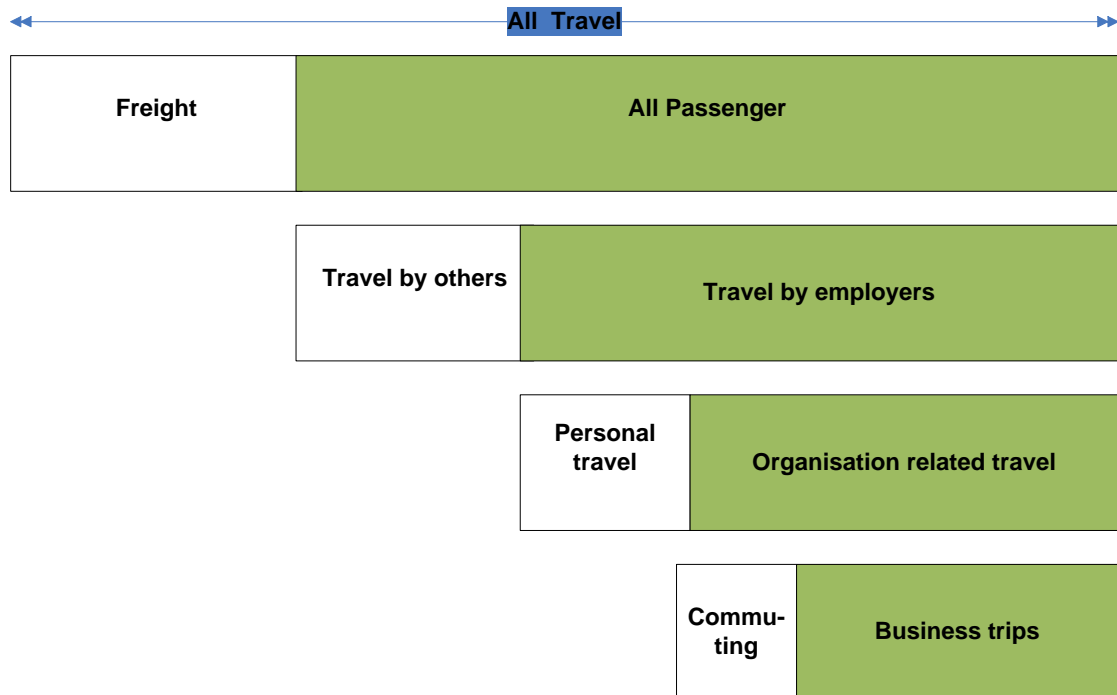
Figure 2.1 The Scope of Business Travel.

The role of business travel is to support the productivity of business organisations and to allow them to grow and develop. Motivations for business travel are different for the organisations, their employees and customers. The employer thinks about how to improve the business and how to save on travel cost, whilst the employee thinks about how her/his travel can be quicker, easier and can be beneficial to their personal life (Swarbrooke and Horner, 2001). Motivations for business travel vary from person-to-person, and from organisation-to-organisation. In the past, research has primarily focused on freight travel and commuting trips. Travel between home and regular place of work has, for many years, been a matter of concern to policy makers, but business travel or work-related travel has not been considered to the same degree as commuting trips, for example (Enoch and Zhang, 2008). Moreover, business travel process management is an under-researched area from a transport economics perspective (Lyons, 2013) and from the perspective of the relationship between mobility, ICT and changing work patterns (Haynes, 2010), yet business travel trips can have important social implications (Roby, 2014).

2.2.3 Characteristics of Business Travel

According to Hess (2004), organisations are not only fixed in their initial location in the place they start at the beginning but the resources, cultures and regulations of the places in which they operate are also changeable due to the need to network with people and other businesses. To explain the characteristics of business travel, Beaverstock *et al.,* (2010; p.1) stated that, *"Business travel remains an important mode of production in firms with, amongst other things, travel being used to: attend firm meetings or training sessions; visit clients to close deals, pitch for business or provide product support; attend trade fairs/conferences; and visit sub-contractors and suppliers to monitor quality control or negotiate new business."*

Turner and Witt (2001) suggested that business travel is a specific form of travel that occurs to allow business organisations to participate national and international trade. However, business travel often can be the reason of labour migration and therefore is not only conceptualised as part of trade in goods and services (Belenkiy and Riker, 2012).

'Business Travel' and 'Leisure Travel'

Both Swarbrooke and Horner (2001) and Lawson (1982) noted that there is an overlap between the term 'business travel' and the term 'business tourism' because the business traveller usually becomes a leisure traveller once work is over. Kellerman, (2010) elaborated the distinction between business and leisure travels through the comparison of motivations, goals, relative magnitude of spatial patterns. Specifically, he found that business travel always implies meeting people, whilst leisure travel does not. He added that both business and leisure travels are relevant at the global, national and local levels. Meanwhile Lian and Denstadi (2004) suggested that the way to distinguish business travel from leisure travel is to look at who pays for the ticket, who determines the destinations and when the trip takes place, the planning horizon and who travels. Thus for business travel, the organisation makes the choices, whereas for leisure travel the individual tends to exert more influence. Interestingly, a qualitative difference between business travel and leisure travel is that 'business travel' is most exposed to competition and most sensitive to price and value for money. As for the tourism companies business travellers are considered as tourists. On the other hand, from an organisation the individual traveller considers their

business trip as both work trip and a leisure trip while going to visit attractions after conferences. Swarbrooke and Horner (2001) also mentioned leisure trips are mostly undertaken during classic holiday periods and at weekends, whereas business travel is undertaken all year round. The destinations are often different, as for leisure travel all kinds of destination – coast, city, mountains and countryside – can be selected, but business trips are largely centred on towns and cities in industrialised countries.

Shaw (2011) elaborated that business air travellers mostly use scheduled as opposed to chartered flights because they tend to travel more frequently than regular tourists and business travellers are prepared to pay higher ticket prices than leisure travellers. From this it is obvious that business travellers have a different impact on the economy compared to leisure passengers. Business traveller's travel can be broadly separated into individual travel and group travel.

Attributes of Business Travel

Reducing travel costs is an important issue for many business organisations. Upton (2005) noted that business travel is generally the second or third largest controllable cost for an organisation, which makes it worth monitoring. Very few business organisations exist without travelling employees. The amount of money an organisation can save by reducing business travel is dependent on the attributes of business travel. These attributes are discussed in Table 2.2 below.

Table 2.2 Attributes of Business Travel (Adapted from Swarbrooke and Horner, 2001).

Attributes	Description
Frequency of travel	Business travel can occur daily, weekly, monthly, annually, less than once a year or even once in a career.
Distance of travel	Distance of travel can be local, regional, and national, international.
Mode of travel	Public vs Private transport, Single mode vs multi-mode, i.e. Car-air-taxi
Duration of trip or event	Hours, days, weeks, months.
Lead-in time to plan trip or event	Hours, days, weeks, months, years.
Degree of compulsion on business traveller to take a trip	No choice: obliged to travel whether they want to or not. Some choice of date but trip must be taken at some time. Choice of whether or not to take the trip at all.
Business travel as an element of one's occupation	Business travel is an essential part of the role, regardless of performance Business travel as a reward for good performance. Little or no business travel is involved in the job.
Who makes the decision on the travel destination?	Individual traveller, employer, client organisation, i.e. company to whom one sells goods, committee or association with which the traveller is associated, wholly external organisation, i.e. exhibition organiser.
Individual vs group travel	Business travel can be undertaken as a group or individually.
Travel to understand a task vs travel to attend an event	Sometimes travel is essential, sometimes only formalities maintain from the organisation with less output of travel.

It is clear from the Table 2.2 that business travel is different from commuting, and non-work or leisure travel. In particular, the decision to undertake business travel is often taken by the employer or in consultation with the employer. It does not include personal travel. Duration and time of travel are also factors of business travel. International business travel mostly takes place annually or monthly in a specific date or time but leisure travel do not need to maintain that particular routine, i.e. more regularly and more often than for leisure, less regularly/frequently than commuting. However, long time travel is the origin of short-term migration for work, which may take place mostly when frequency of travel is more than one year

2.2.4 The nature, role, significance of business travel from an international human resource management perspective

Domestic and International Business Travel

Turner and Witt (2001) suggested that business travel is a specific travel method that occurs for the business organisations to develop national and international trade. Therefore, two types of business travel can be highlighted: domestic or national business travel and international business travel (Swarbrooke and Horner, 2001).

The U.S. Travel Association (2014), noted that domestic business travel is undertaken within a nation's demographic characteristics and travel behaviour. Domestic business travel helps to understand the target audience, which is a key to successful marketing and capturing share of the domestic travel market. Statistics show UK domestic business travel spending of £2.2 billion in the first eight months of 2014, which is less than £200 billion in the same period the previous year (Statista, 2015).

In terms of international business travel, as Welch *et al.,* (2007, p.174) mentioned, *"International travel remains at the heart of international business."* According to Beaverstock *et al.,* (2010: p.2), *"International travel, cross-border business travel has, therefore, become a significant global flow within and generator of corporate networks".* Welch *et al.,* (2007) also noted that international business travellers can be assigned to foreign operations for an extended period of time. These travellers are also called 'expatriates' or 'international assignees' who conduct business travel as an essential component of their work (Welch *et al.,* 2007). The international human resource management literature has described international business travel related to foreign subsidiary staff, foreign direct investment, the management of large mature organisations, and the stress on the strategic use of expatriates as agents of control and coordination (Dowling and Welch, 2004; Scheweiger *et al.*, 2003; Harzing, 2001). To explain this more, Dowling and Welch (2004) found that international business travel is more complex than domestic business travel, as international business travel: involves more HR activities; has a need for a broader perspective; involves employees' personal lives more; involves risk exposure; and has broader external influences. Welch *et al.,* (2007) also focused on the role of international business travellers' expectations; the support given to the international business traveller by the organisation to perform effectively the role and related activities; and international business travellers' management issues.

Organisational Compulsion for Mobility and Business Travel

According to Beaverstock *et al.,* (2010), mobility takes many forms, such as 'tourism' or 'family-related travel' and in economic terms 'business travel'. Business mobility also appears to be *"the fundamental production process in constructing and reproducing the 'Network Society' and the global knowledge based economy that have come to be the hallmarks of contemporary capitalism"* (Beaverstock *et al.*, 2010,

p.2). Business mobility relates to a wide range of business functions including managerial control, purchasing, maintenance, training and development of business activity (Davidson and Cope, 2003; Jones, 2010, 2003). According to Salt (2010, p.107), companies use a range of mobility, short term or long term *"to acquire and transfer expertise between their own sites and those of their clients or collaborators."* Therefore, Salt (2010) added, business travel is one form of this mobility and often can be the reason for labour migration or cross-border movement for purpose of employment in a foreign country. However, it might appear that *"business travel is better conceptualised as part of trade in goods and services rather than as migration"* (Salt, 2010, p.107). Tani (2005) added that migrated business travellers enhance the stock of knowledge at their destination. To explain the knowledge-based service of business travellers in organisations and their compulsion for mobility, Beaverstock *et al.,* (2010, p.2) added, such *"mobility include clients' expectations of delivery of expertise, advice, and one-off solutions through face-to-face encounters, the internal/external labour markets of Transnational Corporations (TNC) and the mobility associated with maintaining various forms of stretched, social management practices, control and relationship."* Jones (2013) mentioned that business mobility enhances the communication between all levels of managers by face-to-face meetings; operational functions like manufactured components or business service inputs; recruitment and training practices; and providing a support to sales people who travel on company business. Business mobility also focused on allowing companies to function on a virtual level or use of video conferencing and telephones (Jones, 2013). Hence, business mobility is more than just a question of socio-cultural and organisational dimensions that surround employee movement, and it is likely to combine information technologies, transport systems and a vast array of infrastructure (Beaverstock *et al*., 2010).

Cairns *et al.,* (2014, p.108) mentioned that a *"New mobilities paradigm highlights issues such as the increasing links between travel and new technologies, and primacy of social networks in determining travel decisions."* So, business mobility is a term that is used to describe the various strategies and technologies used by organisations to make it possible for them to conduct business without being limited to a single location.

Jones (2013) mentioned business mobility relies heavily on networking and the use of a wide range of technological devices to hold meetings, share documents and other data, and complete work tasks without the need to be physically present in the office. Elliott and Urry (2010, p11) found that the means of mobility are becoming increasingly complex, relying on *"access to car, road space, fuel, lifts, aircraft, trains, ships, taxis, buses, trams, minibuses, email account, internet, telephone and so on"*. Dennis and Urry (2009, p.134), meanwhile, proposed that in future many technical-, economic-, social- and policy-related change will be noticed regarding business mobility, such as new invention of electric vehicles, which will help to reduce carbon emissions.

Cairns *et al.,* (2014) added that business mobility contains a number of interesting insights, such as: new technologies have changed the flexibility and value of travel time; use of mobile, emailing, texting are the advanced mobilities and travellers can save time (Urry, 2007). Lyones *et al.,* (2013) found that rail users in the UK in 2010 made much greater use of mobile devices than they had in 2004. Similarly, Elliott and Urry (2010) also mentioned that travellers can be productive while they travel, such as when waiting in an airport terminal lounge, or sitting on a delayed train a traveller can potentially use the time with the help of new technologies. Overall, 'network capital' (connection among individuals) is the extent to which one is connected with other people and is a valuable individual for mobility (Larsen *et al*., 2006; Cairns *et al*., 2014). Business travel is a form of mobility of expertise that transfers knowledge within global companies and this mobility of expertise often causes labour migration (Salt, 2010).

2.2.5 Development of Business Travel Plans

Organisations seek to manage their business travel through site-based mobility management programmes or travel plans (Enoch, 2012). A travel plan can be defined as *"a strategy for an organisation to reduce its transportation impact and to influence the travel behaviour of its employees, suppliers, visitors, and customers"* (Rye, 2002). Enoch (2012) detailed that travel plans emerged in the 1970s among a range of strategies to develop business in United States and subsequently the travel plan concept spread to countries including the Netherlands, UK, Italy, Australia, and parts of Belgium and Germany. Enoch (2012) mentioned that more recently travel plans are

being developed as a business tool instead of as a transport policy tool, and that business travel should be a key element that needs to be considered in these plans. The organisational issues that relate to business travel and which need travel plans to have actions/actors are: organisations' self-interest and internal organisational barriers; taxation issues; lack of public transport operator involvement; and wider transport, planning, environmental, social and economic policies providing contradictory signals to transport system users as to how they should behave. Egan (2002) suggested that the best solution is proper planning and management of the travel budget in combination with an effective travel policy. He also suggested from recent surveys that over 43% of business organisations have no set policies relating to travel programmes.

2.2.6 Sustainable and Socially Responsible Business Travel Policy and Practice

To define sustainability, Vickers *et al.,* (2009) noted, sustainability is the development of a nested hierarchy of systems which meets the needs of the present without compromising the ability of future generations to meet their own needs. Vickers *et al.,* (2009, p.8) also mentioned, *"The sustainability agenda requires a broad focus involving the simultaneous pursuit of environmental quality, economic prosperity and social equity".* Sustainability cannot mean maintenance forever as all systems are of limited longevity (Costanza and Patten, 1995). So, to maintain a sustainably evolving system, a particular relationship between the longevity of component subsystems and their time and space scales may be necessary.

Macbeth (2014) mentioned that sustainable business travel is concerned with managing the costs, social impacts and environmental consequences generated by the use of different modes of business travel. An organisation that practises sustainable business travel considers financial sustainability, social sustainability and environmental sustainability. Usually large organisations are more concerned about sustainable business travel than smaller ones. Macbeth (2014) also noted that by implementing sustainable business travel practices the business community can play its part in improving air quality and reduce greenhouse gases. Also, these business organisations can potentially reduce the need to travel and improve operational performance; save time and money through more efficient travel policies and

practices; and improve the organisations' reputation, which in turn can lead to competitive advantages.

In 2008-09, the Centre for Transport and Society at the University of the West of England was commissioned by the UK Department for Transport (DfT) to undertake a review of existing evidence on business attitudes to transport in the UK. The study contributed to the DfT taking forward its strategy towards a sustainable transport system supporting economic growth in a low carbon world (DfT, 2007). The methodology used for this research was bibliographic and online search, supplemented by contact with 32 organisations, including the Confederation of British Industry, British Chambers of Commerce and the Institute of Directors. The study found business organisations are less concerned about the environmental conditions, health, equity and climate change. However the report also mentioned that, *"In a few cases where business views had been sought, reported attitudes of a degree of willingness to accept in principle higher air prices for reasons of carbon reduction may appear similar in sentiment to those expressed in public attitude studies"* (Lyons *et al*., 2009, p.67). The report also mentioned that to reduce carbon the government favoured flexible working and increased broadband availability. However, with respect to voluntary measures undertaken by businesses themselves, working practice to reduce/change travel patterns seems to be more commonly implemented than direct transport and travel measures. In this respect, Dudley *et al.,* (2011, p.36) mentioned that the more that business *"associations seek to represent 'the voice of business' to government, the more that the messages conveyed can become 'lost in translation'."*

At present, two very important motivations for establishing a business travel plan are the environment and corporate social responsibility (CSR). Lo (2010) discussed the terms corporate social responsibility (CSR) and corporate sustainability (CS), maintaining that both are voluntary business activities and whereby CSR is subsumed under CS, providing a transitional stage that a firm undergoes on its way to implementing CS. In regard to corporations, environmental and social commitments are increasingly implemented under the umbrella-term of CSR, thereby promoting responsible business practices to employees and other stakeholders (Crane & Matten, 2007). CSR can be defined as *"the economic, legal, ethical, and discretionary*

expectations that society has of organizations at a given point in time" (Carroll, 1979, p 500). CSR is a contested and dynamic concept (Crane, Matten, and Spence, 2008),

CSR has become increasingly popular amongst business leaders, and has seen a shifting focus from 'society' and philanthropy to 'stakeholders' and the business case for CSR (Lee, 2008). Association of Corporate Travel Executives (ACTE) and KDS (2009) have measured business opinion on issues around CSR and business travel. The latest survey was conducted between December 2008 and January 2009, and captured the opinions of 329 travel managers and business travellers from around the world.

The study found that companies are not being influenced by the global recession in seeking to promote CSR: 61% of organisations now have a CSR charter (versus 53% in 2008); 27% of organisations prefer to do business with suppliers and partners with a CSR charter; 28% of corporate travel departments are required to report to management on carbon emissions performance. The most common CSR activities are reducing energy waste within company buildings (76% of companies), contributing to the local community (55%), cutting carbon emissions in production plants (34%) and using carbon offset arrangements (25%).

However, this commitment to CSR does not automatically translate into greener travel choices, as these often entail higher financial costs. The survey finds that companies see cost-cutting as the top business travel concern (rated a high priority by 79% of companies), while environmentally sustainable travel is a high priority for only 17%. Overall, environmental sustainability is rated only a mid-level priority for business travel, ranked at this level by 48% of organisations.

In terms of relating the travel plan and CSR more specifically, it can be said that *"the feasibility of linking a travel plan into CSR will depend on the type of organisation and their particular agenda"* (Roby, 2008, p.29). For example, an energy supplier can efficiently link the travel plan into carbon reduction, whereas other organisations, like pharmaceutical or telecommunications companies, may have a different focus in terms of what they want to achieve.

2.2.7 Factors Influencing the Level and Method of Business Travel

According to Aguilera (2008), there are three factors that influence the level of business travel: a) social influences; b) company influences; and 3) employee influences.

Society Influences: Dudley *et al.,* (2011) mentioned that government can influence organisational business travel by emerging travel plan for organisations. Therefore, cost is a major issue that influences the level of business travel. According to Aguilera (2008), *"business travel is sometimes regarded as a forum for the implementation of cost-cutting strategies. Companies seek to reduce travel costs, not by diminishing the total number of trips, but the cost per trip"*. Travel agencies and travel in economy class by air are the aspects that influence business organisations to undertake low cost business travel. Increased cost of fuel and air fares affect business travel; also, environmental issues like cutting carbon emissions are important social factors for undertaking business travel. Besides the growing issues like economic and environmental cost, there are also technological factors that influence business travel, as travel can be replaced by mediated communications like telephone, email, and videoconferencing (Aguilera, 2008). So the amount of use of mediated communication and the priority of using face-to-face or mediated communication are the factors that influence business travel.

Company Influences: sector and size of business travel influences the level of business travel. Aguilera (2008, p.1110) noted, *"development of multi-units companies, a flattening of hierarchical structure and increased employee independence have led to an increased need for internal communication"*. Apart from sector and size of the organisation, the development of teams dedicated to projects is one major trend in the organisation of production by undertaking business travel. In addition, other organisational factors like geographical distribution and communication systems between units influence international and domestic travel. However, globalisation has led to the expansion of many organisations' market, so geographical proximity between manufacturer and client is no longer always a necessity and clients are often more demanding regarding quality standards and personalisation which tends to result in more business travel (Ughettio *et al*., 2002).

Employee Influence: income, hierarchical position, gender, and mobility of employees often influence the level of business travel. Low income business travellers are very rare and long distance travel is particularly strongly related to hierarchical position where the traveller can provide efficiency and knowledge (Aguilera, 2008; Arnfalk and Kogg, 2003; Lian and Denstadli, 2004). According to Stamations *et al.*, 2005) the types of business travel are influenced by the gender, as it was found that short business trips cause physical disorders (anxiety, acute reaction to stress, adjustment disorder) and this disorder increase linearly with the number of mission travelled. For men the ratio has tripled with two or more missions, for women the same pattern was found but the increase was less pronounced (Stamations *et al.*, 2005).

The findings from the literature in factors influencing the level and method of business travel are shown in Table 2.3.

Table 2.3 Factors Influencing the Level and Method of Business Travel (Adapted from Aguilera, 2008).

Influencing factors		Summary of findings	Sources
Society Influences	**Political**	Legislation and regulation, government policies, taxation systems and political stability are important for improved business travel.	Swarbrooke and Horner (2001)
		The travel industry was not supported by the politicians, e.g. American International group Inc (AIG) complained that politicians have unfairly criticized business travel in the wake of highly wasteful trips by executives at troubled companies.	Reuters (2010)
	Economic	The goal of the business organisation is to be as cost effective as possible, while providing staff with necessary travel. If economic growth increases, business travel increases. The recession of the early 1990s shows that a downturn in economic growth had a major impact on business travel services, and from the depth of the recession the business travel services industry in the UK has since made a strong recovery (DfT 2009).	Mintel (1998)
		The interest rate, currency exchange rates, and industry ownership are related to economic growth and these are the major influences on business travel.	Swarbrooke and Horner (2001)
	Social	Demographic changes, social concerns such as environmental issues, and lifestyle development are major factor for business travel.	Swarbrooke and Horner (2001)
		Most business travellers are urban-based and the major components of business travel are accommodation; in most cases hotels, and transport.	Davidson and Cope (2003)
	Technological	Traffic growth, new inventions and use of information technology and all transport modes are related to technological factors. Technology is one of the most important factors, as the society needs to gauge the technology in place to ensure maximum output of business travel.	Lian and Denstadil (2004)

Organisational Influences	**Sector and size**	Quality and frequency of business travel are related to the sector and size of business organisations (e.g. the oil and manufacturing industries make more business trips than others).	Aguilera (2008); Hanlon (1994)
	Organisational aspects	Many organisational elements characterise companies and their business activity. At an internal level, there exist diverse units and the level of business travel will be affected by how many there are, as well as geographical distribution and the communication system between units. How a company organises its work, e.g. whether the trip is necessary or not, is also an important factor for business travel. Certain organisational changes like development of multi-unit companies and development of teams dedicated to a project can increase business travel.	Aguilera (2008)
Employee Influences	**Mobility of employees**	Business travel is carried out by certain employees within organisations, and the number of business travellers is generally less than the quantity of non-business traveller employees.	Aguilera (2008)
	Hierarchical position	Long distance business travel is strongly related to the hierarchical position of employees. This type of travel needs expert travellers and expert travellers usually rank high in the hierarchy.	Arnfalk and Kogg,(2003); Lian and Denstadli (2004)
		The types of employee that influences business travel are: commercial manager, head of exhibition, operation managers, senior production managers, events managers, corporate sales managers, marketing executive, project managers, conference producers, conference assistants, congress planners, and account managers. These employees travel most frequently.	Swarbrooke and Horner, (2001)
	Income	Business travellers usually have high incomes	Mallett (1999)
	Gender	Gender is an important parameter that differentiates between workers undertaking business travel. Women are more likely avoid international business trips for security purposes.	Swarbrooke and Horner, (2001); Aguilera (2008); Chee Hoa and Siew Har, 2014.

2.2.8 Development of Business Travel, Business Travel Trends and Impact of the 2008/2009 Global Financial Crisis

Socio-economic conditions are constantly changing. For example, Britain's socio-economic condition was 'flat' in 1980, 1982, and 'good' after 1982. As the population increased in the late 1980s, so did business activities and associated travelling. In the 1990s the economic recession adversely affected travel, but by 1994 the economy improved again and business travel stared to increase (Rogers, 1998).

The Figure 2.2 illustrates the real annual GDP growth chained volume measure in UK from 1950-2013. Chained volume GDP statistics are calculated by measuring output using the price level of the preceding year and then linking the statistics to give a reflection of actual output changes and excluding any inflationary change (Source, Office for National Statistics 2014). It is noticeable the GDP growth has been changed over the time and in year 2008-2010 the growth decreased. Business trip per person and business miles per person also has been increased and decreased over time due to this economic condition. Figure 2.3 shows the change of business trips per person, per year in Great Britain from 1997-2013. And the Figure 2.4 shows the business travel miles per person per year in Great Britain from 1997-2013. These figures (2.3 and 2.4) show the business trips and miles per person have decreased in 2008-2010. In particular most recently it is clear that the period after 2008 saw a significant contraction in the UK economy that was far more serious than anything in the previous year's minimal GDP growth.
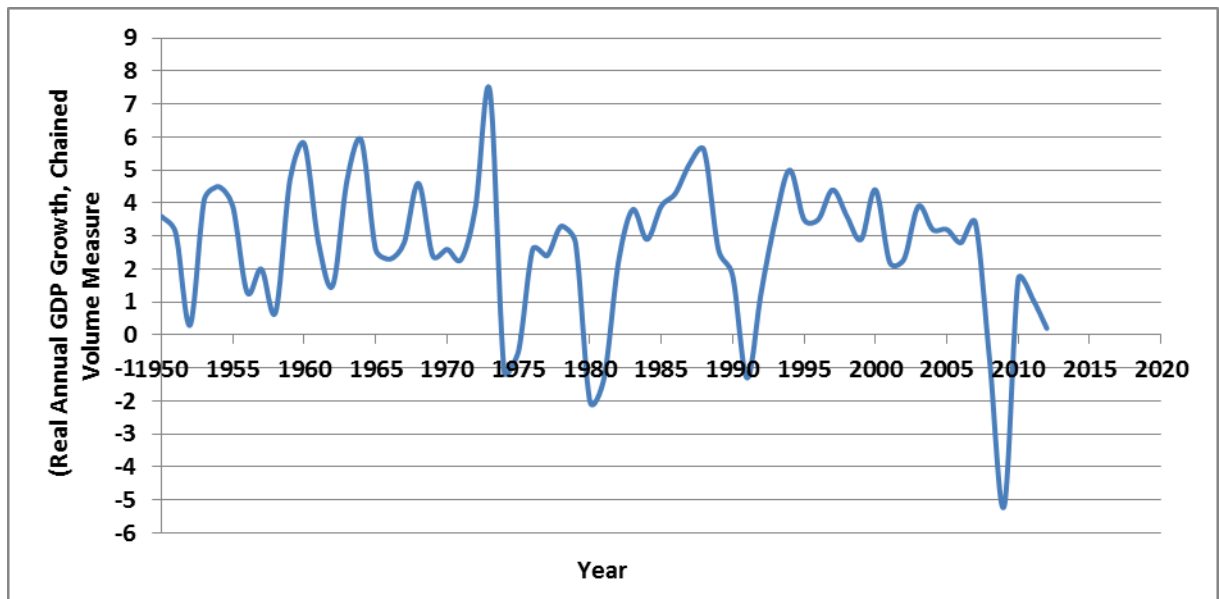
Figure 2.2 Real Annual GDP Growth, Chained Volume Measure (Source, Office for National Statistics 2014).

The Figure 2.3 shows the trends of business trips in the UK from 1997 to 2013. Data suggests that in 2000 and 2005 the highest business trips per person went up to 37 and that rate gradually decreased in year 2009 up to 30. Business travel in the UK changed in 2008/2009 because of the global downturn and recession and started to pick up in 2012.
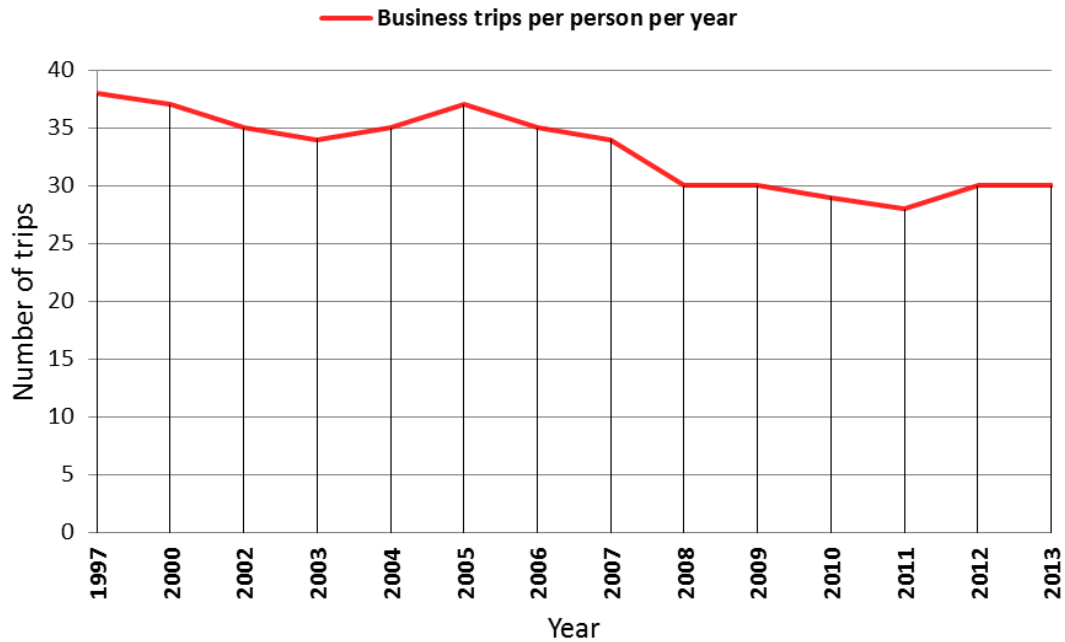
Figure 2.3 Business Trips Per Person, Per Year, Great Britain (Source: National Travel Survey, DfT, 2014).

Figure 2.4 also presents the distance travelled on business trips from 1997 to 2013 (DfT, 2014). It is a major issue of concern whether this change will last even when the recession is over or if the situation will return to where it was before. What the future holds for business travel can only be speculated upon by analysing the past and present situations. From the present data of the DfT (2014), both the number of business trips made and the distance travelled on business trips were lower than comparative figures for 1997. The drop in these figures occurred after 2007, around the time the financial crisis occurred. In 2013, on average a person made 30 business trips, travelling 620 miles. So far, the sector still has not recovered in the UK since the 2008-2009 drop (DfT, 2014).

Figure 2.4 Business Miles Per Person, Per Year, Great Britain (Source: National Travel Survey, DfT, 2014).

Faced with the recession, companies were looking for alternatives to reduce expenses. For example, Vodafone bid to reduce air travel by using videoconferencing, which has increased by 300% in the last few years (Hopkins, 2008). British Telecom calculated that it was saving $330 million per year on avoided travel costs and time saved, and Microsoft realized its savings at $90 million (Winson, 2009). Non-tech leaders such as P&G and Deloitte have installed dozens of systems around the world in an effort to reduce business travel within their organisations (Winson, 2009). The current situation in light of the global downturn and recession can be seen from the survey of AirPlus International (2010). They found that companies in the UK are taking around 15-20% fewer trips, while the amount they spend on travel has fallen by anywhere between 25% and 40%. Figure 2.5 and 2.6 illustrate the international business spending in UK and abroad. The Figure 2.6 shows the spending on business travel has decreased since 2009 and has not gone back to the pre-recession level (year 2008) until 2013.
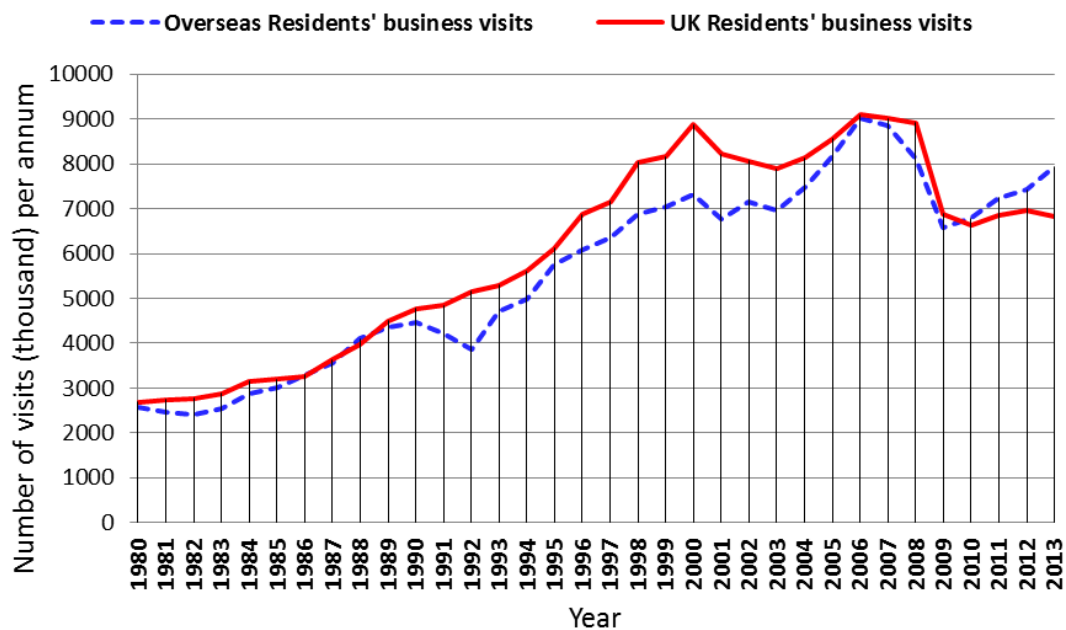
Figure 2.5 Overseas residents' business visits in UK vs UK residents' business visits abroad (Source: Office for National Statistics, 2014).
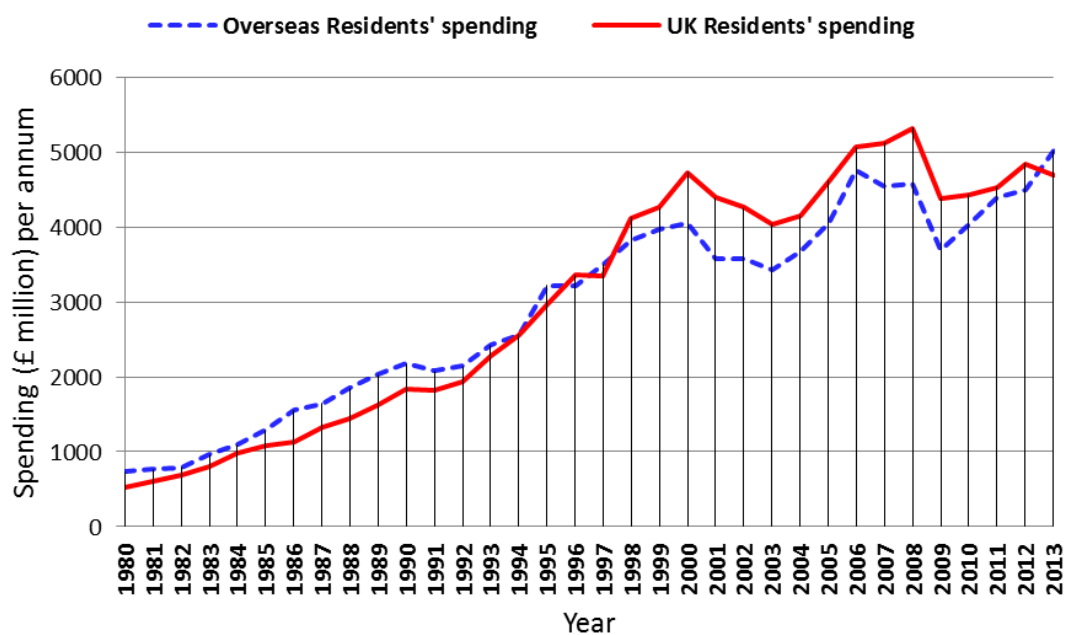
Figure 2.6 Overseas residents' business spending in UK vs UK residents' business spending abroad (Source: Office for National Statistics, 2014).

On the other hand, in the USA a survey of 99 travel buyer members by ACTE (2009) found that only 17% thought they would spend more on travel in 2010 than they did

in 2009. Almost half (47%) expected to spend the same but 36% believed they would spend even less. The experts (Business Traveller members of ACTE) interviewed were unsure and they had doubts about spending in the near future, 2014/2015, would not return to its pre-recession level. However, the Global Business Travel Association (2014) and the US Travel Answer sheet (2014) noted that an increase in cost and a decrease of amenities combined with the absence of visual communication technologies would not stop physical travel in the foreseeable future. Table 2.4 illustrates business travel spending statistics in USA from 2010-2014.

Table 2.4 Business travel spending statistics from 2010-2014 and the total business trips in the USA. (Source: Dooley, 2012; Beauchamp, 2014).

Year	Total business travel spend in billion $	Total of business trips in thousands
2010	234	437
2011	251	445
2012	262	460
2013	272	453
2014	293	467

Data from table 2.4 shows that in USA total business trips and business spend has been increased after 2010.

Economic recession affected UK business travel and its impacts. As the KDS (2009) survey mentioned, environmentally sustainable business travel, was beginning to suffer in the recession, as organisations prioritised cost-savings over supporting sustainable travel. It was interesting that, companies' commitment to a CSR platform remained through not to the 'green' sustainable transport element as organisations prioritised cost-saving over supporting sustainable travel (ACTE, 2009).

2.2.9 Modes of Business Travel

The major modes of transport for business travel in the United Kingdom are either private or business-owned vehicles, rail, air and hired cars, with other forms of transport (bus, cycle) being much less important (DfT, 2008).

Car Travel

According to a study by the British Chamber of Commerce (BCC) (2006), 69% of business trips are made by car, 94% of SMEs make use of the road for their business travel and 82% describe the car as central to their business operations. For car users, the main issue is predominantly traffic congestion. Off-peak traffic congestion in the

UK has gone up and business travellers waste a significant portion of their time in congestion. Thus, BCC (2007) estimated that company car drivers waste a total of 11 days or 264 hours per year in corporation.

Business organisations have several preferences for financing their company car fleet. They can purchase their own cars, lease cars, give cash allowance for private cars or use a pool of cars to avoid tax payments (IDS, 2002). Below are brief descriptions of all these types of preferences, including some examples of UK organisations.

Company cars: Organisations have two principal options for financing their company cars: they can either purchase cars or they can lease cars. Large organisations are more likely to have their own cars. The number of vehicles a company operates depends on the size and nature of the business (Incomes Data Service, 2002). One of the advantages of a company having its own cars is that the company could benefit from sale proceeds that are generally higher than expected. The main advantage of lease cars is that an organisation has exclusive use of vehicles, while ownership and the depreciation risk remains with the leasing company (Incomes Data Service, 2002). There are some drawbacks of buying company cars such as the organisation bears all the charges of servicing, taxes, tyre changes and other consumables, insurance and/or resale of the cars. The repairs are usually covered by service plans which include insurance.

Car replacement depends on the age of the vehicle and recorded mileage. Three years and/or 50,000-60,000 miles is average except for sales force vehicles which are more likely to be replaced after two years. Some examples of organisations in the UK that use company cars are: British Gas Services, Chelsea Building Society, Direct Line Group Services, Manchester Airport Group. On the other hand, there are many companies that have their own vehicles; at the same time they lease cars from other places. One example of such a company is Shell in the UK (Incomes Data Service, 2002).

Cash allowances and grey mileage: Some companies give cash allowances to their employees. In these cases, the employees are responsible for their own (private) cars, or the leasing arrangements (Car Leasing Made Simple, 2012). Examples of these types of company in UK are TotalFinal Elf, Direct Line Group Services, and Bombardier Aerospace Shorts.

Under these schemes, corporate policies set mileage reimbursement rates for staff private cars so that they can drive their own cars for business trips. In other cases, the car may be a company car provided as part of an employment package. In the UK, the Tax and National Insurance example amounts claimable under the HM Revenue and Customs Authorised Mileage Allowance Payments (AMAP) for business mileage in a private car remained the same from 2002 to 2010. If an employer reimburses the employee at a lower rate than the AMAP, then the employee is entitled to claim tax relief on the difference. The AMAP mileage rate of 2010 for all cars up to 10,000 miles is 40p and over 10,000 miles is 25p (HMRC, 2010). This car reimbursement practice has been in place in the UK since 2002. It takes time to change this practice and sometimes this is part of well-establish culture that views these rates not as reimbursement but as a perk. The first stage of moving away from this type of culture is to ensure that new staff is not offered company cars as a perk (NBTA, 2010)

Pool cars: The pool car system can save company money. For a car to qualify as a pool car there can be no private use. It is important to keep a log of all the journeys and mileage that the pool car has done and this should correspond with the vehicle's mileage. By using a pool car, staff can overcome a common obstacle to non-car commuting, which is that staff feel obliged to bring a car to work on the off chance that it will be needed for a business trip (Terrazas, 2013).

Car clubs and car hire: The obstacles to operating a car pool are the costs of buying pool vehicles or committing to contract hire agreements, plus the administrative burdens of a pool booking system and vehicle maintenance for companies that do not already operate vehicles. Corporate membership of a car club can overcome these and give inexpensive access to vehicles when corporate staff needs the vehicles on a pay-as-you-go basis. The car club company may offer to set up special parking by with vehicles near to the companies (Incomes Data Service, 2002).

Taxis: Taxis are perceived as expensive and many accounts departments set a high threshold to reimburse staff for using them. Whilst taxi use can be abused, it actually requires very high levels of usage to attain the levels of expenditure involved in company purchases of cars or contract hire. Company policy should recognize the potential for taxis to facilitate use of public transport by covering awkward gaps in occasional journeys (Cooper *et al.*, 2010).

Railway Travel

Railway travel is very important for business travellers. According to BCC (2007), 91% of all businesses currently make use of the railway networks for business travel purposes and 16% of all train travel is for business travel purposes (BCC, 2007). Using rail travel is more environmentally friendly than car travel. Rail travel for business purposes can also save time. The same distance travelled by a car can be travelled on a train 25% faster if a railway route exists. However, there are other factors or problems associated with travel by train and for that reason railway travel is not as widely used by business travellers as cars. These problems include a lack of availability of routes and poor frequency of train arrivals/departures. Also, a car can go from office to office, but a train traveller also has to select other travel means such as taxis, or walk to get to the final destination. Yet, even though there are some issues associated with railway travel, the many advantages of railway travel cannot be neglected, and with proper planning business organisations can make much better use of rail systems. Business travellers can make unproductive time productive and economically valuable by working on trains (Lyons *et al.*, 2007). According to Lyons *et al.*, 2007 (p.107), *"Less time spent travelling is assumed to convert unproductive time into economically valuable time".*

Governments can play a vital role in making railway travel easier for business travellers by improving the fare system, and by investing in the network to increase punctuality and reliability. In the UK, High Speed 2 (HS2) Rail has the potential to transform the economic context by connecting cities including Birmingham, Manchester and Leeds and providing them with opportunities to increase their growth potential. HS2 is predicted to generate £48.2 billion in user benefits to businesses when the entire network is completed, as well as £15.4 billion in wider economic benefits (HS2, 2013).

There are some disadvantages of train travel, in the location of railway is fixed, and not readily diverted, other than by changing station location (Halcrow, 2000), so it could be time consuming for the business travellers.

Air Travel

Business travellers are particularly attractive to scheduled airlines as they travel more frequently than leisure passengers and they are willing to pay higher prices than leisure passengers (Shaw, 1986; Mason, 1995). Business travellers usually pay full fare, which is less at risk to the seasonal fluctuations. BCC (2006) showed that 60% of businesses rely on air transport for business travel.

According to Mason (1995, p.197), "*faced with an increased choice of airlines, prices, and frequency, the behavior of the business travel market is difficult to predict*". The liberalisation of the European Union (EU) market and with it the arrival of low-cost airlines in the EU has brought new competitive conditions to the market place. Business travelers, for short haul trips, have increasingly adopted low-cost airline services (Mason, 2001; Mason, 2006). According to Budd and Graham (2009, p.286), "*rapid growth of the private business sector is a direct but primarily unintended consequence of liberalization which has developed to overcome some of the negative aspects resulting from regulatory reform, including delays, congestion, and perceptions of poor customer service*".

The consultancy Forrester Research estimates that airlines make five times as much profit on a business class seat as one in economy class (Shein, 2008). However, this market has been decreased in size for various reasons. Budd *et al.,* (2014, p78) mentioned that the 2008-2009 recession was a critical time for policy makers, regions, airports and consumers as "*the implications of routes being withdrawn, links being severed at short notice and airlines ceasing operations are potentially far reaching, especially for regions with limited alternative air service provision or sources of employment*". Interestingly, though, in this period the use of low cost airlines for business travel increased.

Domestic business travel by air can be influenced by surface transport options but for international business travel, air transport (which is not environmentally friendly) is necessary. Since the mid 1980s the number of airline passengers worldwide has doubled (IATA, 2007). This rapid growth in passenger numbers and the new techniques of passenger screening that have been introduced to stop terrorist threats have caused conventional air travel to become overcrowded, stressful and unpleasant experience. Corporate business aviation has been introduced for the business

travellers to by-pass lengthy security and immigration queues and avoid congested hubs (Clark, 2006; Budd and Hubbard, 2010). Corporate business aviation is the use of any "general aviation" aircraft for a business purpose. The Federal Aviation Administration (2015), defines general aviation as all flights that are not conducted by the military or the scheduled airlines. According to Budd and Graham (2009, p.285), "*business aviation encompasses both premium (first-and business class) airline travel and a dedicated private business aviation sector that operates customized aircraft for non-scheduled flights*" and the phenomenon of private business aviation is spreading in global market (Budd and Hubbard, 2010).

However, in recent years business organisations have started to replace air travel with virtual meetings. One factor that has surfaced in recent years as a key reason for reduced business air travel is use of videoconferencing. Over the past decade, several studies have been carried out to learn whether videoconferencing can be a substitute for business air travel and the answer is as yet unclear. Any substitute for air travel will not only reduce the cost and time requirements of business travellers but also reduce the damage done to the environment. Davidson and Cope (2003, p.17) elaborated upon this point by stating, *"An argument sometimes advanced in support of the more sustainable nature of business travel over its leisure equivalent is that since many business visitors use public transport, such as trains, to reach their destinations, they are supporting less polluting forms of transport than the family car, which is used so extensively for leisure travel. But while this argument may hold some weight for much domestic business travel it is clear that the most international business-related trips are made by air, the most highly polluting mode of transport"*.

Coach Travel

According to Dargay and Clark (2012), corporate coach hire is now common practice for transporting groups for staff events and conferences for short distances; however, for long distance travel coaches have less income elasticity (all modes, purposes and distance bands). Modern coaches are comfortable, sociable and an environmentally friendly means of travel (CPT, 2006). Coaches use road space very efficiently in comparison to cars. However, coaches have not been problem-free for business travellers: issues have included operational control on heavily used bus stops, and environmental problems associated with large numbers of old, badly maintained

diesel buses (World Bank Urban Transport Strategy Review, 2002). There are solutions available, or in sight, to some of these problems. A range of measures exist to tackle the worst of the environmental problems: high-specification buses with low emissions, trolley or dual mode buses, and better urban design to overcome adverse land use and development aspects. They could take a more innovative role in a sustainable transport future (CPT, 2006). However, coach journeys are slower and passenger space is more limited in comparison to rail travel (Cresswell, 2010).

Metro Travel

While the coach offers a potentially and more direct service in terms of short distance business travel, in practice the metro provides a faster and more reliable service under normal operating conditions (GLA Economics and Transport for London, 2005). According to the World Bank Urban Transport Strategy Review (2002), the metro is the "*segregation that is critical to providing a rapid service and the technology that allows a high mass ridership to be carried*". A survey done by (Halcrow, 2000), identified the privacy threats for travellers. The report suggests that just over half of the respondents (51%) reported that travel by metro is safe. About 21% of the respondents reported that they were concerned with the potential misuse of travel data for tracking individuals' whereabouts. About 28% travellers were concerned about pick-pocketing, antisocial behaviour, vandalism, violence, fare evasion, aggression towards women, terrorism, suicide attempts on metro lines, misuse of alert buttons and illegal drug transactions. Travellers were comfortable to travel by metros because of the CCTVs and they wasted less time during security checks compared to trains and air travel.

In terms of the amount of business trips by metro (GLA Economics and Transport for London, 2005) data shows the number of employers' business trips by metro in London is 3.9 per cent of total trips, implying 33 million employers' business journeys per annum on the London Underground (metro) system.

LRT and Tram Travel

Light rail transit (LRT) involves reallocation of existing road space; it also adds new capacity, when using former rail alignments, for example (World Bank Urban Transport Strategy Review (2002). LRT is environmentally friendly for business

travellers, as per the World Bank Urban Transport Strategy Review (2002). The core approaches to LRT development in many developed countries are: environmental/urban design improvements (e.g. in the city centre), car controls and improved accessibility for the travel-disadvantaged, and it should be developed in this broader context. LRT is often considered a more affordable alternative to a metro, while having the up-market and 'green' image which coaches do not usually have.

Similarly for trams, González *et al*, (2015) mentioned that travellers between public transport modes (coach and tram) tend to notice saving travel time in trams to a greater degree, which reflects a favourable perception of tram travel conditions with respect to coach travel conditions. However, an appropriate public transport policy should focus on improving perceptions of service quality. Actions such as publicity campaigns highlighting actual travel times would be useful by increasing the frequency of the service to reduce waiting time, and appropriate location of tram stops to facilitate access on foot are also called for.

Ferry Travel

In the context of islanders travelling to the mainland or a larger island, the main transport for business travellers is the ferry ride across the water (Vannini, 2011). The quality of a ferry service is of critical importance to how useful it is to business communities. Quality is multi-dimensional and includes amongst other things not only journey time, but also frequency, the length of the operating day, where the ferry departs from and arrives, reliability and comfort (Laird, 2012).

Cycle Travel

Cycling is pollution free and an environmentally sustainable mode of transport that makes a negligible contribution to congestion. Business organisations can encourage cycling by providing facilities such as showers, changing rooms and lockers. Businesses may have fantastic facilities for cycling, like parking spaces, changing rooms for cyclists, however changing people's travel behaviour is difficult. Employers should think creatively about what programmes and incentives will encourage people to take that first cycle journey, and to keep on cycling. Achieving cultural change in an organisation is all about leadership and leading by example. The

more people who are seen to use cycles for business travel, the more 'normal' it will become as a transport mode.

Pool bikes are another way to facilitate staff movements between different sites. They can save large amounts of time if local roads are congested. Some high quality folding bikes in the pool can facilitate longer business trips by bridging the link to train or bus. One example is Better Bankside (2013), who introduced a pool bike scheme called Bankside Brompton bike for business trips and errands. These pool bikes can be loaned to business organisations free of charge for a six-month period. They are also available for area employees to use for work trips during the day. Brompton folding bicycles can be folded and used as part of a longer bus or tube journey. However, there is a question of security and safety while using bicycles in areas with a high crime rate (Dickinson, *et al.,* 2003).

Through providing safe and high-quality infrastructure, the Government may attract users, and greater provision of bicycle infrastructure has indeed been associated with higher levels of cycling (Dill and Carr, 2003). Government's encouragement and the whole range of stakeholder involvement is important to improve cycling for business travel (NBTN, 2010).

Walking

The health benefits of walking are proven and walking for short business trips can help employees to stay healthy, plus these trips can save the company travel costs (Heinen *et al.*, 2014). However, not all environments are equally supportive for walking and cycling (Handy *et al*., 2002, Saelaens and Handy, 2008; and Titze *et al*., 2008). New infrastructure could contribute to an increase in active travel like walking and cycling. However, walking for business trips is not that common, due to the variable locations of business meetings (Heinen *et al.*, 2014).

2.2.10 Technological Alternatives to Business Travel

Business organisations have replaced some of business travel and face-to-face meetings with virtual communications and this is potential for environmental and financial improvements of business organisations (Arnfalk and Kogg, 2003). USA air market especially, business travellers account for 75% of airline passenger income,

and this income could fall if business air travel is replaced by virtual meetings (Lian and Denstadli, 2004).

According to Beaverstock *et al.,* (2010), it is important to develop business travel virtual meetings. Research by Arnfalk and Kogg (2003) suggested that videoconferencing permits savings in terms of time and money due to the substitution of certain trips; it has also had an important impact on improving internal communications. It allows more frequent meetings. However, the disadvantages of video conferencing are sound delays which make participants feel uneasy with the technology, and the difficulty of presenting certain products (Haynes, 2010).

Just as virtual meetings have disadvantages, face-to-face meetings also cause problems. These include the inconvenience associated with air trips: waiting in airports, lack of space in aircraft, lack of flexibility of schedules, delays, cancellations, the difficulty of using cellular phones abroad and the very high costs of using phone services provided on planes.

The literature review presented in the previous section covers the business travel process, some issues and the likely impacts of business travel. These are explained in detail in this section.

2.3 THE BUSINESS TRAVEL PROCESS MANAGEMENT (BTPM)

Business travel process management (BTPM) in many organisations is professionally managed business travel by the travel managers, the organisation's activities to implement policies, regulations and standardize routines for business travel and its stakeholders. (Jenkins, 1993; Lubbe, 2003; Gustafson, 2012). Business travel process management (BTPM) is not an easy task, especially since it involves interactions with various stakeholders (Gustafson, 2012). Freeman (1984, p.46) defined stakeholders as *"any group or individual who affects, or is affected by, the achievement of the organisation's objectives"*. Haines (1977) first identified seven stakeholder groups involved in a business: managers, employees, shareholders, customers, suppliers, lenders, and society. Both Douglas and Lubbe (2006) and Gustafson (2012) stated that business travel stakeholders include travel managers, travellers, policy makers, suppliers (airline, train companies, hotels) and travel management companies (TMCs). A more detailed classification of stakeholders who are involved with

business travel, the stakeholders and their respective roles, as highlighted by Mason (2010), are illustrated in Table 2.5.

Table 2.5 Stakeholders Involved with Business Travel and their Roles (Source: Mason, 2010).

Stakeholders		Role
Employee	Traveller	Support the functioning of the business
	Secretaries and PAs	
Employer	Procurement	Try to reduce business costs to support wider function, also able to influence strategy
	Travel Manager	
	Chief Financial Officer (CFO)	
Service Providers	Travel Management Company (TMC)	Aim to enable client business to deliver business travel efficiently and effectively whilst making a profit
	Merchant Card Company	
	Travel Supplier, Airlines, hotel, car rental group, rail companies, conference operator	
Wider Community	External clients, suppliers	Functional areas very distinct, slow process

However, in most organisations, business travel and the working conditions of business travellers are not an issue for human resources (HR) departments. Instead, the management of business travel is largely left to line managers (Welch *et al.,* 2007). This is despite the organisational rules and regulations of business travel *"control and/or commitment-based management"* (Gustafson, 2013, p.22) often being implemented by the human resources departments. The business travel process management therefore requires a process that can manage all the stakeholders accordingly. According to Sigala (2007, p.335), "*as business travel has become the second largest corporate cost, corporate travel managers are increasingly being pushed to better control and reduce business travel expenses. To this end, companies are developing stricter and specific travel allowance processes and policies*".

Rogers (1998) noted that the first conference was held in Detroit in 1896 – a concept that is now well established all over the world. The concept of managing an organisation's travel arrangements and expenditure only really started to develop after

1945 and became very important in the 1980s. To define conferences, Soanes (2010) mentioned that a conference is a formal meeting in which many people gather in order to talk about ideas or problems related to a particular topic. Due to poorer economic conditions in the 1980s and the deregulation of the domestic airline industry in 1978, there was a trend towards more USA corporations creating in-house corporate travel departments to cut business travel costs, to provide better service to company travellers and to increase corporate purchasing power. Before the de-regulation period and poorer economic conditions, the trend of corporate travel was simple. The company used to let each department, division, or even individual manager make their own travel plans (Morrison, 1989).

Because of the stretched economic conditions, unplanned travel practices and deregulation of the airline industry the in-house corporate travel ideas became less desirable. Corporations started to lose purchasing and negotiating power with the airlines, hotels and, car rentals (Runzheimer Report, 1986/87). To overcome these problems, various associations were established to manage corporate travel. Examples include the National Business Travel Association (NBTA) and the Association of Corporate Travel Executives (ACTE). ACTE and NBTA immediately attracted some of the most powerful names in business travel management. For a generation, ACTE has pioneered, initiated, and advocated just and balanced global travel management industry innovations and improvements. The association has been in the forefront of: security legislation; contagion/business preparedness; GDS Evolution; Technological Development; safety and communications procedures; corporate social responsibility; government policy; taxation; and hotel process and theory (ACTE, 2015).

Interestingly, whilst business travel and its associated processes have evolved over time, it is only since the 2008 recession that systems have significantly changed. Thus, large business organisations often use travel management companies (TMCs) to book and manage travel (Gustafsan, 2012), examples of which include Amex Global Business Travel ([www.amexglobalbusinesstravel.com)](www.amexglobalbusinesstravel.com), Carlson Wagonlit Travel (http://www.carlsonwagonlit.com/), GBTA (Global Business Travel Association) (http://www.gbta.org). Holma (2012) and Gustafson (2012) mentioned that in some organisations travel managers play a vital role in managing business travel. According to them, travel managers are mostly found in relatively large organisations and their roles are: developing and implementing a travel policy; cooperating with

TMCs, negotiating agreements with important suppliers; standardising payment routines; collecting and analysing travel statistics in order to monitor travel behaviour; and communicating and gaining support within the organisation. For a very complex activity, such as managing business travel processes, a collaborative approach between the various stakeholders is desirable.

2.4 OUTCOMES OF THE LITERATURE REVIEW ON BUSINESS TRAVEL

2.4.1 Issues and Impact Related to Business Travel

From the literature review on business travel there are number of issues found that need further explanation. These are described below:

- The business travel process is highly complex because of the range and diversity of its stakeholders. According to Gustafson (2012, p.277) *"business travel is indeed a highly complex industry, owing to the character of the products involved."*

- With regard to business travel policies, Roby (2010, p.28) mentioned, *"The lack of poor implementation of a travel plan as part of the planning process has been an issue with this method of securing travel plans".* Roby (2012) highlights inconsistent levels of monitoring of travel plans by local authorities as an issue.

- Motivation for business travel is different for the organisations, their employees and customers. For business organisation the motivation of business travel for a director and an employee can be different. The employer thinks how to improve business and how to save the travel cost, rather the employee thinks how the travel can be quicker, easier and can benefit their personal life (Swarbrooke and Horner, 2001).

As per Beaverstock *et al.,* (2010), Swarbrooke and Horner (2001), DeFrank *et al.,* (2000) and Roby (2008) the current business travel issues have three types of impacts: a) social impacts b) organisational impacts c) Personal impact

a) Social impact

BCC (2007) found that only 21% of SME's had taken active steps to use public transport instead of car. Almost 70% felt that public transport is not fit for purpose. The main barriers they noted for using the public transport are

time taken to reach the destination, route origins and destinations and service reliability were identified. Also, the expert panel or focus group of both rural and urban business organisations agreed that the car ownership and the flexibility and ease of travel provided by the car was a barrier to public transport use.

b) Organisational impact

According to Runzheimer Report (1986/87), organisations need to develop an effective policy for their business travel. It has also found, 57% of companies in the USA had formal written travel policy which were often too general, banal and sometimes out of date (Guizzardi, 2005). In recent years it has found that, although things are slowly improving, unplanned business travel is an on going problem which can create an adverse impact not only on organisations but also on society more broadly (Guizzardi, 2005).

c) Personal impact

Westman (2004) conducted a survey of thirty-five business travellers (American, Israeli, Swedish) about coping with business trips and related problems. From this survey it was found that a business trip consists of four phases: 1) pre-trip 2) journey 3) stay and 4) post trip. Each phase is characterised by different coping strategies. For instance, a business trip may cause resource loss (work flow) for the traveller in the pre-trip phase. Failure to gain resource or workflow after hard work and concentration leads the traveller to become stressed.

Business travel is a vital element of business success (Lyons, 2013) and business travel often reaches beyond sharing knowledge and helps to develop trust benefits of human relationships. Also, according to Faulconbridge *et al.,* (2009), trust building via business travel can minimise the future need of travel.

Table 2.6: Positive and Negative Impact of Business Travel (Benefit and Drawbacks).

	Positive impacts of business travel (Benefit)	Negative impact of business travel (Drawbacks)
Social	*Economic:* Beaverstock and Budd, 2013 (p.1) noted that business travel improves global productivity and *"it also has a major economic input into other sectors, including commercial aviation, car rental business, train operating companies, accommodation providers, event management firms and electronic payment systems through the direct spending of business travel".*	*Environmental:* Business travel causes environmental impacts, for example, unplanned business travel results in increased air pollution (Barde and Button, 1990). However, many companies are not aware of this situation (Dudley, 2010). Thirteen per cent of CO_2 emissions from transport are from business travel (NBTN, 2010a).
Organisational	*Trust building:* Business travel is a vital element of business success (Lyons, 2013). According to Faulconbridge *et al.* (2009), trust building via business travel can minimise the future need of travel. *Networking:* Business travel is about interconnections between various networks and relates to the nature of space or specialities (Beaverstock *et al.*, 2010)	*Business loss:* If the organisation does not have written travel policies to practices then it can create an adverse impact on the organisation (Guizzardi, 2005).
Personal	*Self-improvement:* Business travel often reaches beyond sharing knowledge and helps to develop trust benefits of human relationships. Business travel enhances personal career paths and brings much job satisfaction and variety to the working week (Welch *et al.*, 2005)	*Work-life balance:* According to Beaverstock *et al.* (2010), for many workers business travel is a normal everyday reality of work, which often has some downsides such as separation from family, travel stress, health concerns, and jet-lag, and lack of focused on work. Dimberg *et al.* (2002) have found that short business trips cause stress and physical and psychological disorders.

2.5 THE FUTURE OF BUSINESS TRAVEL

If the economy develops in future that will result in increment employ from around the world and therefore the amount of business travel will increase. There will always be a need for face-to-face meetings, product deliveries, and marketing factors. Virtual meetings often can be alternatives to face-to-face meetings, and along with these virtual meetings the mode of travel needs to proceed in a controlled way to get maximum benefit of costs and business development. Dennis and Urry (2009) state, *"we believe that many important technical-economic, social and policy changes are sowing the seeds of a new mobility that will develop in this century"* (p.63), and that *"a high carbon 'business as usual' car system is not likely to still be with us by 2050"*. (p.134). So, the invention of new vehicles and integration of transport with telecommunications will cut carbon emissions in the future (Cairns *et al.*, 2014). However, according to Dennis and Urry (2009) (p.161), the *"integration of databases […] will have direct implications for human freedom."*

In practice, the UK Highways Agency's national travel plan aims to encourage and enable staff to adopt sustainable travel behaviour and reduce carbon emissions by 15% from the main highway agency officers and administrative business travel (NBTA, 2010a). They are anticipating there will also be business benefits from encouraging staff to be healthier and reducing sickness absence in the workplace (NBTA, 2010a). Defra (2010) noted that the Climate Change Act, 2008 commits the UK to reduce emissions by 80% by 2050 from a baseline of 1990.

2.6 SUMMARY

Business travel in the world today constitutes an important part of human life. Proper planning of business travel is clearly required yet is often neglected by many business organisations. To further enhance the business travel planning capacity of an organisation it is necessary to study both qualitative and quantitative details of business travel. In a continuously changing technological environment it is ever more necessary to analyse and update the possible solutions to businesses for planning their travel. There is also a need for the use of alternative ways to tackle the rising challenges of business travel. Information systems such as encouraging home working

(with remote access to files and email), teleconferencing (saving time and money), improved public transport information (maps and route finder tools), planning of bus routes to and from the business (using GIS) and fleet management (telemetrics, fuel management) are all potential methods and tools that can help meet the ever increasing demand of business travel whilst limiting impacts on human lifestyles.

The geographical scope of business travel ranges from the local to the global and therefore these scales need to be defined for appropriate consideration. Also the modes of business travel include car, coach, railway, sea/ferry and air. For each of these modes separate considerations have to be given to analyse and understand the need and usage. Technological developments like teleconferencing and video conferencing are also sometimes being used as a substitute for business travel. However their integration into business travel planning should not exclude the consideration that personal meetings are important for business organisations and that not all meetings are able to be replaced by teleconferences.

Travel plans and travel policies can be important criteria for the development of business travel, although the application of travel policies and travel plans occurs less in the business travel sector than for commuting or freight travel. Business travel therefore supports the productivity of the world economy and sustainable growth by adding new business through various ways, such as meetings, conferences and trade fairs. Business tourism is also an important part of leisure travel and the economy.

The goal of business travel planning is to maximise business efficiency and minimise the travelling hours of employees and the carbon emissions resulting from that travel. With this goal in mind qualitative data has been collected and reviewed that can be used later to model (with the help of function modelling: definition added in methodology chapter) an improved framework for business travel planning. The literature review results suggest there are some barriers related to the political motivation, economic conditions, social acceptability and technological developments. The scope of this research is to investigate the process implications of business travel within organisations with a view to improving travel practices. Examining the existing literature identifies the nature, role, significance, benefits and barriers of business travel.

Organisations need to engage more strategically, for example aligning their travel programme with key objectives. How the organisations can separate necessary trips from unnecessary ones, use tougher enforcement policies and constantly improve travel plans are the key focus of this study. This research will find out the most effective ways for improving business travel practices within business organisation.

Table 2.7 shows the research gaps, research questions that found from the literature review and shows the research challenges from the data collection stage. As shown in Table 2.7 a range of research gaps are identified and research challenges are outlined. These challenges can be however overcome by the adoption of a suitable theory business process modelling (BPM), travel policy rules, data (data from expert interviews, survey, and case studies) and methods.

Table 2.7 Research Gap, Research Questions, Research Challenges.

Research Gap	Research Questions	Research Challenges
Gap one Lack of qualitative research regarding business travel process management (Beaverstock *et al.* 2010; Aguilera, 2008; Swarbrooke and Horner, 2001).	How can we define and characterise business travel? What motivations drive business travel? What are the key issues related to business travel?	The definition, motivations, characteristics, and issues related to business travel vary by different individual, as some cases commuting and freight are also part of business travel (Dudley, 2010). It was difficult to give proper definition and scope of business travel, whether to keep commuting and freight under the business travel or not. The literature review suggests, the scope of the business travel mostly accounts for 'travel in course of work'. This research will identify by empirical study the scope of the business travel.
Gap two Lack of sector specific research on current process (issues and system used) related to business travel (Beaverstock *et al.* 2010).	What are the current process-related business travel issues facing business organisations of different sectors?	Business organisations keep their issues and system related information confidential. To overcome these barriers and undertake a sector specific organisational survey is a challenge as the research needs to deal with confidential data of the organisations.
Gap three Lack of empirical research in business travel area (Beaverstock *et al.* 2010; Gustafson, 2012).	What are the in-depth /detailed activities related to business travel process management in different types of organisation?	Business Travel is managed by different stakeholders (policy makers, strategic administrators, tactical administrators, travellers, TMCs, IT, Consultants). To develop a structured system that can be useful for all these stakeholders is a challenge. Case Study data will be analysed through a BPM modelling approach to identify an ideal process/ Framework.
Gap four Lack of a structural Framework on Business Travel Process Management	What is the ideal business management process? How can business travel be managed in a more structured manner?	Aligning Business Process Modelling (BPM) and business travel research streams is a challenge as 'BPM' and 'Transport Research' are from two previously unrelated disciplines. A new conceptual framework needs to be developed as a business travel process management (BTPM) framework which will describe the roles and responsibilities of the stakeholders.

CHAPTER THREE
RESEARCH METHODOLOGY

3.1 INTRODUCTION

According to Seale (1998, p.3), research methodology is the "*political, theoretical and philosophical implications of making choices of method when doing research*". In other words, research methodology helps to establish and justify the techniques adopted by a researcher for collecting, analysing and interpreting data.

It is important to note the distinction between the terms 'method' and 'methodology'. Fundamentally, the research method refers to the range of techniques that are available to researchers to collect evidence about the social world, whilst the research methodology refers to a broader 'bigger picture' sense of research strategies, research design, research methods and the criteria in research (Bryman and Bell, 2011). A variety of considerations enters into the process of doing research and for the research methodology it is also important as to which theory guides the research or whether theory is an outcome of the research.

This chapter presents and justifies the methodology adopted throughout various stages of the thesis. The research 'onion', a general concept of research methodology which is used to guide the development of methodology for this research, is first defined and explained in this chapter. The research onion comprises a range of layers which consider the research philosophies, approaches, strategies, choices and data collection methods as well as data analysis. The review of these items is necessary as it gives understanding to the researcher in helping to make the realistic and appropriate choice of techniques to accomplish this research. The second part of this chapter presents the adoption and justification of the research methodology for this research. Specifically it explains the techniques and approaches used in conducting the research to achieve the aim and objectives of this research.

3.2 RESEARCH ONION

The research 'onion' (Figure 3.1) contains important information that has to be considered when creating a research design. This 'onion' has been used as a guide for research in business and management (Saunders et al., 2007). For this thesis, it will be used to structure the research methodology. The research 'onion' has been chosen because it reveals in its layers everything from research philosophies to techniques and procedures of undertaking research and data analysis in a proper strategic manner. Many authors describe research philosophies, techniques and procedures of undertaking research, which can be seen as being the "building blocks of research" (Grix, 2010, p. 10); however the research onion is the most structured way to present it and has also been used for business research. It assists researchers to develop research methodology by giving more easily understandable steps in a logical sequence as the onion shows what needs are to be considered first and so on in developing the research methodology. Apart from that, it shows everything graphically and with everything put in place, and so makes things easier for researchers to use and understand.

The important information of the research 'onion' is contained in six layers as shown in Figure 3.1. These layers are: research philosophies, research approaches, research strategies, choices, time horizons, data collection and data analysis for research. The way researchers choose to answer research question will be influenced by their research philosophy and approaches. The research questions will then confirm choices of research, strategy and choices of collection techniques or procedures and analysis types, as well as time horizons within which researchers undertake their research (Saunders et al., 2007). The contents of each layer of the research 'onion' are now discussed.

Research Philosophies (Section 3.2.1)

Research Approaches (Section 3.2.2)

Research Strategies (Section 3.2.3)

Research Choices (Section 3.2.4)

Time Horizon (Section 3.2.5)

Ontology

Deductive

Experiment

Mono Method

Longitudinal Design

Data Collection and Data Analysis

Cross-Sectional

Mixed Method

Survey

Inductive

Case Study

Quantitative

Epistemology

Action Research

Qualitative

Grounded Theory

Archival Research

Ethnography

Axiology

Techniques and Procedures (Section 3.2.6)

Figure 3.1 The Research 'Onion' (Adapted from Saunders *et al.,* 2007).

3.2.1 Research Philosophy Types

The first, outer layer of the onion is research philosophies. Saunders *et al.,* (2007) state that there are three major ways of thinking about research philosophies, these are: epistemology, ontology and axiology. Researchers must ruminate as to which research community they belong before considering the appropriate research design (Fellows and Liu, 2008; Remenyi *et al*., 1998) and to which research philosophy they therefore contribute. Bryman (2004) and Crotty (2007) mentioned the research philosophy would outline the research approaches and impact the whole research process. Creswell (2003) and Saunders *et al.,* (2007) stated that researchers could identify the research methodological approach to be followed by assessing the knowledge claims brought to the study. For example, quantitative research is associated with positivism (Creswell, 2003; Saunders *et al.,* 2007). However, Knox (2004) questioned this suggested connection between methodological approaches and philosophical stances, and suggested using a logic thought of principles to address the research needs at different levels. Crotty (2006) supported this view by arguing that bending and adopting appropriate research methods for each individual piece of

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research to achieve its research aims/objectives was more important than aligning the methodological approach with philosophical stances.

Since the relationship between methodological approaches and philosophical stances is not straightforward, Slife and Williams (1995) stated that philosophical ideas still influence the practice of research and therefore should be identified, although most of the time they remained "hidden" in the research. Smith and Taylor (2002) argued that it is unwise to conduct research without an awareness of the philosophical issues that lie in the background.

Creswell (2003), Saunders *et al.,* (2007) and Remenyi *et al.,* (1998) suggested that researchers must think of the ontological and epistemological assumptions of their research before considering the appropriate research design. Bryman (2004) and Crotty (2007) stated that the ontological and epistemological statements would shape the research approaches and impact the whole research process

Ontology

Ontology is the starting point of all research, after which one's epistemological and methodological positions logically follow (Grix, 2010). Ontology is concerned with the nature of reality (existence) or development of knowledge and the nature of that knowledge (Creswell, 2007; Willis *et al*., 2007). Ontology answers the question "what is the nature of being"? (Saunders *et al*., 2007)

Epistemology

Epistemology refers to the theory of knowledge, in particular, how to acquire or generate knowledge (Saunders et al., 2007; Bazeley, 2004). There are two basic points which need to be looked at: (1) what is knowledge, and (2) how to obtain 'valid' knowledge (Williams and May, 1996). A major philosophical problem is how to know something is true. The solution is to define knowledge in an alternative fashion, one where knowledge is only 'asserted'. It is supported by evidence (usually of an empirical variety), and knowledge claims are conceived of in a probabilistic sense (Walliman, 2006). The particular central issue in this context is the question of whether the social world can be studied (Bryman and Bell, 2011).

Axiology

Axiology is the branch of philosophy that studies judgements about value, (though it is of course recognised that the researcher will be demonstrating the values of the research throughout the research process). Values here mean the process of social enquiry (Saunders et al., 2007, Killam, 2013). Axiology primarily refers to the 'aims' of the research. This branch of the research philosophy attempts to clarify what trying to explain or predict seeking to understand it. Axiology is a collective term of ethics. As for example axiology means that research is undertaken in a value-free way, and that the researcher is independent from the data and so can maintain an objective stance. In axiology, research is value laden; the researcher is biased by world views, cultural experiences and upbringings and these affect the research findings. Also, research is value bound, with the researcher being a part of what is being researched (Saunders et al., 2007).

3.2.2 Research Approaches

Saunders *et al.,* (2007) described that research approaches can be two types. These are deduction and induction.

Deductive Approach

The deductive approach can be summarised as developing theory and using generating hypotheses or research questions, which can then be tested empirically. This leads to findings and the confirmation or rejection of hypotheses or research questions and possible amendments to the theory (Bryman and Bell, 2004). The deductive approach is also referred to as the 'waterfall approach'.

- The deductive approach works from the general to the more specific;

- Sometimes this is informally referred to as being a "top-down" approach; and

- The conclusion follows logically from premises (available facts).
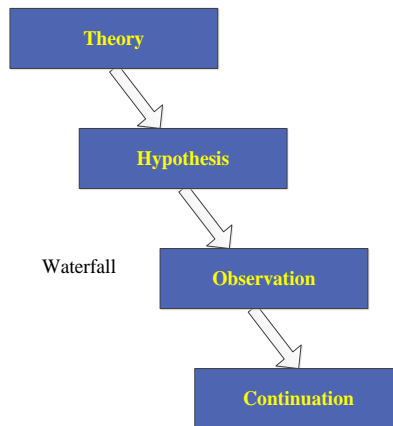
Figure 3.2 The Deductive Approach (after Bryman and Bell, 2004)

According to Creswell, (2003) under the deductive approach, the:

a) Researcher tests or verifies a theory;

b) Researcher tests hypotheses or research questions from the theory;

c) Researcher defines and operationalises variables derived from the theory; and

d) Researcher measures or observes variables using an instrument to obtain scores.

Inductive Approach

In an inductive approach, a researcher collects data and develops theory as a result of data analysis. Research using this approach is likely to be particularly concerned with the context in which such events are taking place. For that, the study of a small sample of subjects is more appropriate than a large number. Researchers with this approach are more likely to work with qualitative data and use a variety of methods to collect the data in order to establish different views of phenomena. Induction is more related to interpretivism (Saunders *et al*., 2007).

- Inductive approach works the other way, moving from specific observations to broader generalisations and theories;

- This is generally a "bottom up" approach;

- Conclusion is likely based on premises; and

- Involves a degree of uncertainty.
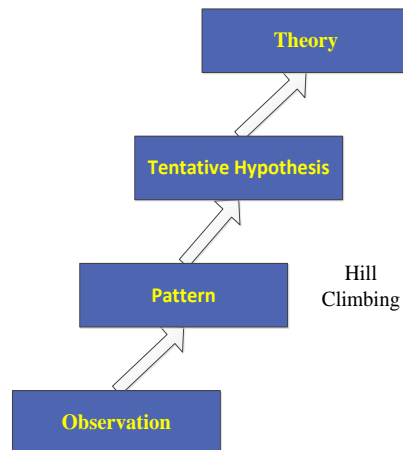
Figure 3.3 The Inductive Approach (after Bryman and Bell, 2011)

According to Creswell, 2003 in inductive approach, the:
  a) Researcher gathers information (e.g. interviews, observations);

  b) Researcher asks open-ended questions of participants and/or records field notes;

  c) Researcher analyses data to form themes or categories;

  d) Researcher looks for broad patterns, generalisations, or theories from themes or categories; and

  e) Generalisations and/or theories, past experiences and literature.

It is important also to classify the research approach in terms of whether it is inductive or deductive. Saunders *et al.,* (2003) mentioned that a researcher should explain clearly which approach is being followed in their research project. Marshall and Rossman (1997, p. 17) illustrated the theoretical use of both terms (inductive and deductive) as follows: "*When researchers first begin to open up any new line of enquiry there will be no useful theories available from which to deduce propositions for testing. Knowledge has to begin with collecting facts and then trying to find some order in them. This is known as induction. Deduction is the technique by which*

knowledge develops in more mature fields of enquiry. It involves a sort of logical leap. Going a stage further than the theory, data is then collected to test it".

Pitfalls of Deductive and Inductive Method

Deductive research looks for cause and effect but does not really address how human interpretations of the world exist in the current situation, whereas inductive research is more concerned with the "context of events" (Saunders *et al*., 2003). Trochim (2006) noted that arguments based on experience or observation are best expressed inductively, while arguments based on laws, rules, or other widely accepted principles are best expressed deductively. However, according to Morse and Mitcham (2002), in inductive method the observation is always selective. Induction approach cannot avoid assumptions. From this criticism, fear of violating inductive processes has resulted in researchers unwillingness to focus on a concept until it emerges and some researchers even avoid the literature before commencing fieldwork (Glaser, 1992)

Saunders *et al.,* (2003) noted that the inductive approach gives the chance to have more explanation of what is going on. In research, the two main types of analysis typically used are quantitative (deductive) and qualitative (inductive). Though there seems to be some disagreement among researchers as to the best method to use when conducting research and gathering data, these two methods are not mutually exclusive and often address the same question using different methods. The decision on which type of approach to use depends on the purpose of the study and the type and availability of the information required (Naoum, 2006).

Quantitative research

Quantitative research often translates into the use of statistical analysis to make the connection between what is known and what can be learned through research (Bryman and Bell, 2011). With quantitative analysis it is possible to get visual representations for the data using graphs, plots, charts, and tables. For researchers using quantitative analysis, the conclusions are drawn from logic, evidence, and argument (Trochim, 2006). The methods mostly used for quantitative analysis (SJI, 1999) include experiments, quasi-experiments and surveys.

Qualitative research

Qualitative research gives a much deeper understanding of social phenomena than purely quantitative research (Silverman, 2000). In many cases qualitative methods were developed in the context of a critique of quantitative methods and research strategies (Flick, 2006).

It is not that qualitative research never uses statistical methods and numbers. In fact qualitative research often combines many approaches, and statistical analysis could be one part of it (Symon *et al.,* 2000). According to Creswell (2007, p.15), "*the research design process in qualitative research begins with philosophical assumptions ... Further, in many approaches to qualitative research, the researchers use interpretive and theoretical frameworks to further shape the study*".

According to Flick (2006) qualitative research focuses only using multiple methods, (Denzin and Lincoln, 2000, p.5) also define qualitative research as, "*the use of multiple methods, or triangulation, reflects an attempt to secure an in-depth understanding of the phenomenon in question*".

According to Hancock (1998), the most common methods for collecting qualitative data are: individual interviews, focus groups, direct observation and case studies.

3.2.3 Research Strategies

There are different kinds of research designs and frameworks to collect and analyse data (Bryman and Bell, 2011; Saunders *et al.,* 2003); these include:

1) Experiment;
2) Survey;
3) Case Study;
4) Action Research;
5) Grounded Theory;
6) Ethnography; and
7) Archival Research.

Experiment

According to Bryman and Bell (2003, p.47), "*true experiments will allow doubts about internal validity to be allayed and reflects the considerable emphasis placed on the determination of causality in quantitative research*". Experimental research makes observations or obtains measures using instruments at a pre- or post-test stage of the procedures (Creswell, 2003). In experimental research the researcher manipulates at least one independent variable, controls other relevant variables, and observes the effect on one or more dependent variables (Connaway and Powell, 2010). Experimental research is considered to be good for testing causal relationships and suited to bounded problems or issues in which the variables involved are known, or hypothesised with some confidence (Fellows and Liu, 2008). In experimental research, the independent variable can be observed, introduced, controlled and manipulated by the researcher (Kumar, 2011). This approach aims to produce results that are objective, valid and capable of replication by other researchers or by the initial researcher (Gray, 2009). The required resources are limited, but the time consumed is not predicable (Saunders *et al.,* 2007). There are different types of experiment including: manipulation, classic experimental design, the laboratory experiment, and quasi-experiments.

Survey

Surveys are an important tool frequently used in gathering information. According to Weisberg *et al.,* (1996) surveys are one way to collect information about attitudes, beliefs and behaviour. Sapsford (2007) stated that a survey finding gives an insight into a population and that there are four elements (Figure 3.4) involved in the initial planning and definition of a survey. These are: a) problem definition, b) design measurement, c) sample selection, and d) concern for respondents.
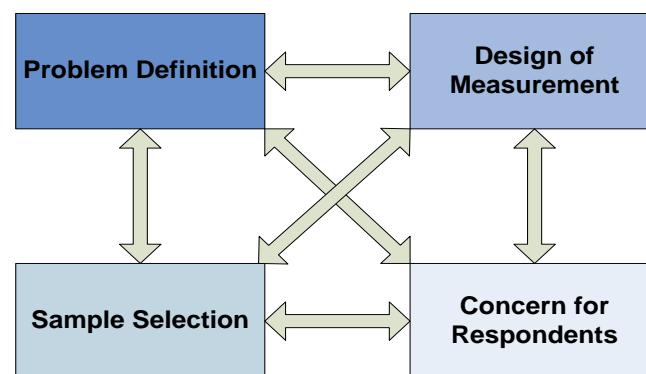
Figure 3.4 Overall Design of the Survey (Adapted from Sapsford, 2007)

The purpose of the problem definition level is to decide what kinds of survey answers are required for the purpose of the study. Design of measurement is deciding what is attitudes are measured and how. Yin (2003) suggests that the level of survey strategy needed is dependent on answering the questions of who, what, where, and how many. Finally the concern for respondents relates to ethical clearance and confidentiality.

The survey approach is a group of research methods commonly used to determine the present status of a given phenomenon (Connaway and Powell, 2010). The basic assumption of most survey research is that, by carefully following certain scientific procedures, one can make inferences about a large group of elements by studying a relatively small number selected from the larger group (Forza, 2002). Therefore, surveys operate on the basis of statistical sampling, and the information gathered from a sample of individuals is used to describe the characteristics of a defined population (Thomas, 1996). The survey approach is used to gather contemporary data, and is suited for studying a large number of cases, including those that are geographically dispersed (Gray, 2009). Also, survey research is generally considered to be more appropriate for studying personal factors and for exploratory analysis of relationships (Yin, 2003). Survey research can be exploratory, analytical and descriptive (Connaway and Powell, 2010).

Case Study

Case study design is a method by which it is possible to capture holistic data from a unique person or a group of people (Robson, 2002). According to Yin (1994, p. 15), a case study "*explains the causal links in real-life interventions that are too complex for the survey or experimental strategies.*" A case study usually carried out for one single case and the data from one case study is sufficient to represent the whole social phenomenon. Yin (1994, p. 4) suggests that, "*within the single case may still be incorporated subunits of analyses, so that a more complex -- or embedded -- design is developed*". Therefore, a single case study could be holistic or could be embedded in design. This approach concentrates on the examination of a single instance or event (Birely and Moreland, 1998). Instead of using large samples, case studies focus on observing an individual case (or a small number of multiple cases) to analyse the variables relevant to the subject under study. The case study approach is of greatest relevance when the focus of a study is on extensively exploring and understanding

rather than confirming and quantifying (Kumar, 2011). When doing case studies, the researcher has the ability to access a range and a depth of information using multiple sources of data or multiple means of data collection, such as documentation, archival records, interviews, direct observations, participant-observations and physical artefacts (Yin, 2003). However, the use of multiple sources of data and multiple methods of data gathering make the whole process very time-consuming. In case studies, it is critical for the researcher to decide what should be included and/or excluded when selecting the information and data (Cameron and Price, 2009).

Action Research

Action research usually includes collaborative reflection on existing thinking and practice relevant to it (Cameron and Price, 2009). It can be defined as a controlled process of inquiry conducted by and for those taking the action to evaluate problems and potential solutions (Sagor, 2005; Fellows and Liu, 2008; Gibson and Brown, 2009). Two types of action research are quasi-experimental research and descriptive research (Sagor, 2005; Fraenkel and Wallen, 2006; Fellows and Liu, 2008). Action research is complex (Fellows and Liu, 2008) and differs from other research strategies because it unambiguously focuses on action, in particular promoting change within the organisation (Saunders *et al.,* 2007).

Grounded Theory

Grounded theory is a specific, highly developed, rigorous set of procedures for producing a formal, substantive theory of social phenomena (Schwandt, 2001). This approach aims to formulate hypotheses based on conceptual ideas and to discover the participants' main concern and how they continually try to resolve it (Saunders *et al*., 2007). The grounded theory approach develops models, hypotheses, and theory directly and primarily from the data without reference to pre-existing concepts or theories (Connaway and Powell, 2010). Grounded theory research values the process of continuously developing, refining, and enhancing theory in recognition of the contributions that other studies, perspectives, and minds can make to the original effort (Mann and Stewart, 2000).

Ethnography

This strategy is firmly based on the qualitative or inductive approach (Saunders *et al.,* 2007). Ethnography is a particular kind of qualitative inquiry distinguishable from case study research and descriptive research by the fact that it is the process and product of describing and interpreting cultural behaviour (Schwandt, 2001; Creswell, 2007). The emphasis in this type of research is on documenting or portraying the everyday experiences of individuals by observing and interviewing them and others who are relevant (Fraenkel and Wallen, 2006).

Archival Research

This type of research strategy means some feature of the past is studied either by tracking documents of the period or by interviewing individuals who lived during the time. The researcher then attempts to rebuild as accurately as possible what happened during that time, and to explain why it did (Fraenkel and Wallen, 2006). Archival research often means making use of administrative records and documents as the principal source of data for research (Saunders *et al.,* 2007).

3.2.4 Research Choices

In choosing research methods, researchers can use a single data collection technique and corresponding analysis procedures, known as the mono method, or use more than one data collection and analysis procedure for answering research question, which is known as multiple methods (Saunders *et al.,* 2007).

Mono method

The mono method is where the researcher combines either a single quantitative data collection technique such as questionnaires with a quantitative form of analysis or a single qualitative data collection technique such as in-depth interviews with a qualitative data analysis process (Saunders *et al.,* 2007).

Mixed methods

Although most researchers apply either deduction or induction, or quantitative or qualitative approaches in their work, some have suggested combining one or more research approaches or methods in one study. The combination of these two approaches is known as mixed methods (Saunders *et al.,* 2007) or triangulation

(Fellows and Liu, 2008). According to Patton (2002), mixed methods involve combinations of more than one data collection technique (either quantitative or qualitative) with associated analysis techniques.

Greene *et al.,* (2005) state that mixed methods are uniquely able to generate better results than studies bounded by a single or mono method. The mixed approach can be divided into two categories: mixed-method research and mixed model research (Saunders *et al.*, 2007). Mixed method research uses quantitative and qualitative techniques and analysis procedures at the same time or one after the other, but does not combine them. This means that although this method uses both a quantitative and qualitative approach, data will be analysed separately: quantitative data are analysed quantitatively and qualitative data qualitatively (Saunders *et al.*, 2007). The mixed model research combines both techniques for data collection and analysis procedures as well as at other phases of the research, such as generating research questions. This means that quantitative data can be qualities and qualitative data can be analysed quantitatively (Saunders *et al.*, 2007).

Tashakkori and Teddlie (1998) argued that the term "mixed model" is more appropriate than "mixed method" for research in which different approaches are applied at any or all of a number of stages through the research, their point being that mixing often extends beyond just the methods used in the research. Indeed, mixing of methodologies within a broad quantitative or qualitative approach may raise almost as many issues as when working across approaches (Barbour, 1998); mixing may also occur across different disciplinary traditions, for example, in social history, or when scientists engage in social research to evaluate the impact of their work. It becomes necessary, therefore, to clarify just what is being mixed and how it is being mixed. The "mixing" may be nothing more than a side-by-side or sequential use of different methods, or it may be that different methods are being fully integrated in a single analysis (Caracelli and Greene, 1997).

3.2.5 Time Horizon

There are two types of time horizon: a) cross sectional and b) longitudinal design.

Cross sectional

Cross-sectional study (also known as a cross-sectional analysis, transversal study, or prevalence study) is a type of observational study that involves the analysis of data collected from a population, or a representative subset, at one specific point in time. This approach is designed to study some phenomenon by taking a cross section of it at one time (Kumar, 2011). Cross-sectional analyses form a class of research methods that involve observation of all of a population, or a representative subset, at one specific point in time.

Longitudinal design

Longitudinal design is the long term research which is mostly an extension of social survey research. For historical analysis or to collect long term data, longitudinal design is important. According to Kumar (2011, p. 97) "*to determine the pattern of change in relation to time, a longitudinal design is used*". Kumar also mentioned that longitudinal studies are appropriate when undertaking time-series analysis. However, such studies can suffer from the 'conditional effect', as for example, if some respondents are contacted frequently they began to know what is expected and may respond to the question without thought. A longitudinal survey is a correlational research study that involves repeated observations of the same variables over long periods of time - often many decades.

3.2.6 Techniques and Procedures

Data collection techniques and procedures are a communication process which transfers data from one person to another, i.e. researcher to respondents and data gathering or vice versa (Fellow and Liu, 2008). Kumar (2011) mentioned that there are three ways to collect data: a) observations, b) questionnaires and c) interviews. Apart from these, reviewing books and articles are also an important source of data collection (Fraenkel and Wallen, 2006; Schmuck, 2006; Gibson and Brown, 2009). Fellows and Liu (2008) state that methods of collecting data, generally, may be categorised as either one-way or two-way communications. One-way communications, for example, are postal questionnaires (survey approach), completely structured interviews, diaries, archives or documents and observations by researchers. One-way methods mean either acceptance of data provided or their

rejection, clarification, checking and others. Two-way communications, such as semi-structured interview and participant observation permit feedback and gathering of further data by probing (Fellows and Liu, 2008). Details of each example from both one-way and two-way communications are discussed below.

Observations

Observation involves noting how people act or how things look in a specific setting (Fraenkel and Wallen, 2006; Schmuck, 2006). It is a fieldwork description of activities, behaviours, actions, conversations, interpersonal interactions, organisational or community processes or any other aspects of observable human experience (Patton, 2002; Fink, 2008). Observational research requires the researcher to collect data or participate with others in data collection. It involves the researcher in analysis and interpretation of those data (Patton, 2002).

Observation is often classified as either participant or non-participant observation (Schumck, 2006; Saunders *et al.*, 2007). Non-participant observation is the simplest form, and is where the researcher will observe the phenomenon 'from outside' with no engagement with either the activity or the subject. This could be done using various techniques, for example video, photography or simply watching and recording the data on an appropriate sheet (Schumck, 2006). The second form is that of participant observation, where the researcher actually takes part in the phenomenon being studied (Fraenkel and Wallen, 2006; Saunders *et al.*, 2007). Data in this instance would be recorded by the researcher in the form of field notes, whereby the researcher's experience is would be recorded.

Table 3.1 Advantages and Disadvantages of Observation (Schmuck, 2006).

Advantages	Disadvantages
Researcher can gain data on behaviours rather than perceptions and feelings.	Researcher's presence can alter respondents' behaviour.
Researcher can see things that some respondents will not be able to report.	Researcher might have to wait a long time before seeing what they can see and get what they observe.
Data can be gathered using video.	Different researchers might see different things while observing same events

Questionnaires

A questionnaire, as an example of survey techniques, is a printed list of interrogative or declarative statements that individuals respond to in writing (Schmuck, 2006). It works best with standardised questions that the researcher can be confident will be interpreted the same way by all respondents. Questionnaires can therefore be used for descriptive and explanatory research, to collect data about opinions, behaviours and attributes (Saunders *et al*., 2007). The questions are of two forms: open and closed questions (Schmuck, 2006; Fellows and Liu, 2008). Open questions are designed to enable the respondent to answer in full, to reply in whatever form with whatever content and to whatever extent the respondent wishes (in interviews, the researcher may probe). The questions are easy to ask but may be difficult to answer, the answer may never be filled in or completed and often the answers are very difficult to analyse. It is essential that the answers to open questions are recorded (Fellows and Liu, 2008). Closed questions have a set number of responses as determined by the researcher. However, the rigidity of available responses may constrain the responses artificially. Hence a response opportunity of 'other, please state' should be provided wherever possible for cases which are not relevant to respondents (Fellows and Liu, 2008). Although the technique speeds respondents through the survey and maintains relevance of the questions answered, extensive use of filter questions can be annoying.

The questions should be unambiguous and easy for respondents to answer. Questions concern facts, knowledge and opinion (Fellows and Liu, 2008). Advantages and disadvantages of questionnaires are shown in Table 3.2 below. All questionnaires should be piloted initially, completed by a small sample of respondents. The piloting will test whether the questions are intelligible, easy to answer and unambiguous, through obtaining feedback from respondents (Saunders *et al*., 2007; Fellows and Liu, 2008). There will be an opportunity for improving the questionnaire, filling in gaps and determining the time required for and eases of completing the exercise (Fellows and Liu, 2008).

Table 3.2 Advantages and Disadvantages of Questionnaires (Schmuck, 2006)

Advantages	Disadvantages
Open-ended questions can be created easily and quickly.	Responses to open-ended questions can be ambiguous or unclear.
Respondents can complete questions quickly.	Analysis of open-ended responses takes time.
Open-ended responses offer rich quotations that are useful for data feedback.	If questions with rating scales include two or more ideas, results will be unclear.
Questions with rating scales can be scored quickly and results can be clearly presented in graphic tables and figures.	Researcher has little opportunity to establish trust and rapport with respondents.

Interview Strategies

The interview strategy is an approach used in qualitative research (Wolcott, 2009). An interview refers to any person-to-person interaction between two or more individuals with a specific topic in mind (Kumar, 2005; Saunders *et al*., 2007). According to Marshall and Rossman (2006), interviews involve personal interaction and participants' cooperation is essential. Interviews can help researchers to gather valid and reliable data relevant to their research questions and objectives (Saunders *et al*., 2007). Interviews also allow other people to enter into the other person's perspective. It is a way that a researcher can explore someone else's experience (Patton, 2002; Richards, 2009). Based on the several definitions, an interview can be understood as a performance involving a two-way encounter (two parties). It is essential that the researcher has his or her own questions, which enables the interview to work in a way similar to regular conversation.

Interviews can be very flexible. An interviewer has the freedom to formulate questions related to the issue under investigation. It also can be inflexible, when the interviewer has to keep strictly to the questions previously decided (Kumar, 2005). An interviewee (or participant) is invited to comment on the relevance of the questions posed and is encouraged to expand at length on the chosen topics or issues (Barbour, 2008). It can be done either in one-to-one or face-to-face conversation with a person in any form or format of group interviewing (Silverman, 2008b; Richards, 2009). The selection of which way reflects the questions that are going to be asked, types of people to be involved in the interview and their number (Richards, 2009). The use of this approach is closely related to its advantages and benefits (Kumar, 2005):

- More appropriate for complex situations. This is the most appropriate approach for studying complex and sensitive areas;

- Useful for collecting in-depth information. An interviewer can obtain in-depth information by probing;

- Information can be supplemented. An interviewer is able to supplement information obtained from responses with that gained from observation; and

- Wider application. An interview can be used with almost any type of population such as children, handicapped or very old people.

Table 3.3 Advantages and Disadvantages of Interviews (Schmuck, 2006)

Advantages	Disadvantages
Researcher can probe for clarification and elaboration.	Time consuming (i.e. lengthy process involved in transcribing voice recordings or audiotapes).
Researcher can build rapport and closeness with respondents.	Challenge of proper sampling arises when everyone cannot be interviewed.
Researcher can help in collecting data from respondents who cannot or will not write about their thoughts and feelings.	Respondents' haziness in talk.
Respondents are secret when they pool answers outside earshot of researcher.	Researcher physical characteristics and social position may lead to bias in respondents' answers.
Data can be gathered using voice recorders or audiotapes: permanent record for others to use.	Respondents may fear that what they say will be used against them.

There are different types of interviews, which depend on the types of information the interviewer is trying to obtain and the degree of flexibility. They can be categorised as unstructured, semi-structured and structured (Kumar, 2005; Willis *et al*., 2007; Gibson and Brown, 2009).

Unstructured interviews

Unstructured interviews bring almost complete freedom to the interviewer in terms of content and structure because they are informal. The interviewer has complete freedom in the wording to use and the way to explain questions to the respondent (Kumar, 2005; Saunders *et al*., 2007). This type of interview is useful to cover topics in great detail. There are several types of unstructured interviews. Kumar (2005) states that in-depth interviewing, focus group interviewing, narrative interviewing and oral histories are unstructured interviews.

Semi-structured interviews

Semi-structured interviews consist mainly of open-ended questions based on topics that need to be covered. The interviewer has the opportunity to explore answers more widely or other areas of discussion introduced by the interviewee (participant) (Barbour, 2008). Some probing or additional questions may be required to explore research questions and objectives of researchers, given the nature of events within particular organisations (Saunders *et al*., 2007; Silverman, 2008a). This approach might involve a sample involving between six and twenty people. The questions should not be of a kind which invite simple 'Yes' or 'No' answers. The aim of the researcher is to stimulate reflection and exploration. This approach is often concerned with people's feelings, such as about living in the flight path of a planned new airport runway. At its best, the method can lead to significant advances in our theoretical understanding of social reality; more routinely, it is particularly good at enabling the researcher to learn, at first hand, about people's perspectives on the subject chosen as the project focus (Davies, 2007).

Structured interviews

According to Kumar (2005), structured interviews mean use of a predetermined set of questions, using the same wording and order of questions as specified in the interview schedule. An interview schedule is a written list of questions, open-ended or closed-ended and prepared by an interviewer for the purpose of interaction (this may be face-to face with participants, by telephone or by other electronic media such as video conferencing). Structured interviews provide uniform information and require fewer interviewing skills than unstructured interviews (Kumar, 2005). Structured interviews are used to collect quantifiable data; hence, they are also referred to as quantitative research interviews (Saunders *et al*., 2007).

Whatever the strategies that are going to be used for research, researchers have to consider the relevance of all strategies around them. Factors of time, cost, capabilities of the researcher in handling respondents and respondent behaviors need to be considered in choosing the appropriate strategies for obtaining data for research (Fellows and Liu, 2008). It is dependent on whether what a researcher chooses as the most suitable and appropriate strategies can meet her or his research objectives.

3.3 METHODOLOGICAL CONSIDERATIONS AND RESEARCH DESIGN OF THE CURRENT STUDY

Section 3.2 discussed the main concept of research onion that used in research. In the current study this process has also revised to define the methodological approach. Figure 3.5 presents how the concept of the research onion was adapted to the current research context. The next few sections describe it in detail.
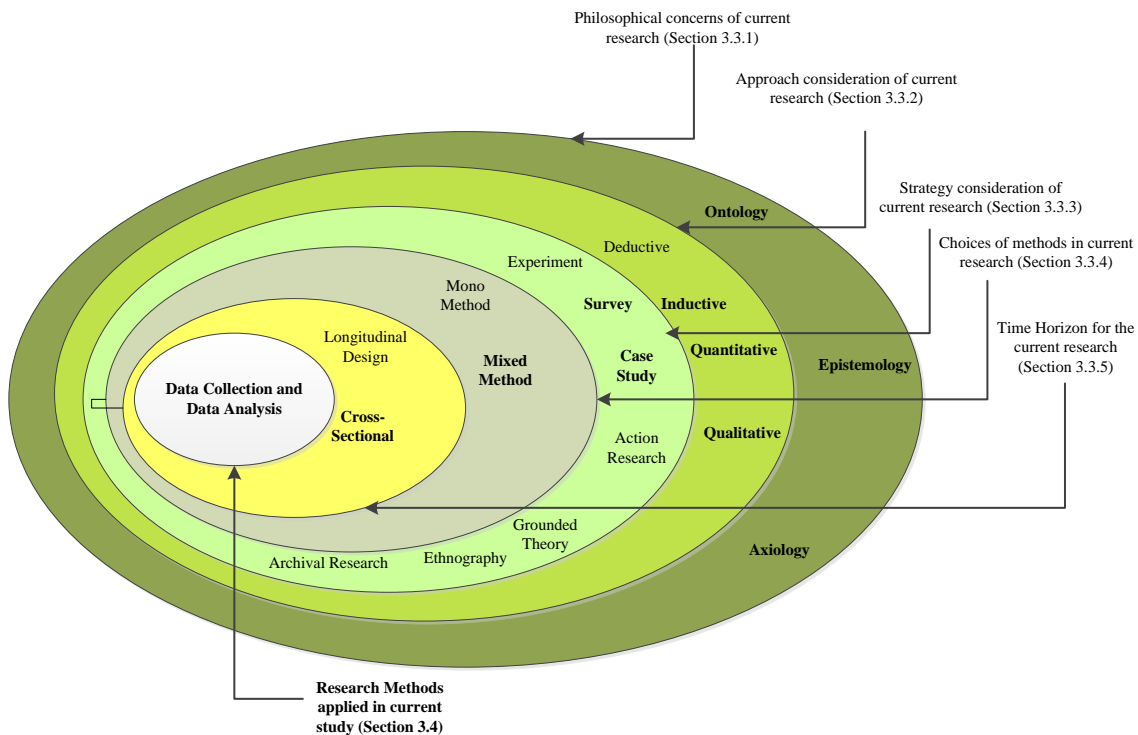
Figure 3.5 Research Onion Adapted to the Current Research Context.

Table 3.4 Research methodology Adapted

Research Methodology Adopted	
Item	**Choices**
Type of Research	Exploratory
Research Philosophy	Ontology, Epistemology, Axiology
Research Approaches	Inductive, Qualitative
Research Strategy	Interview Strategy, Survey, Case study
Time Horizon	Cross-Sectional
Research Choices	Mixed Method/Triangulation
Data Collection	Literature review and semi-structured interviews
Data Analysis	Qualitative analysis

3.3.1 Philosophical Concerns of Current Research

Ontological Consideration

As discussed in section 3.2.1a, ontology deals with questions such as, "what is the nature of being" (Saunders *et al.,* 2007). Looking at business travel process management from an ontological perspective means that the question to consider is: what is the nature of business travel process management in organisations?. A thorough literature review has been undertaken to know the nature of business travel process management, also 15 expert interviews have been conducted to explore the current business travel process, as well as an organisational survey has been carried out to gather broader perspective among current business travel processes in UK organisations.

Epistemological Position

As discussed in section 3.2.1, epistemology means what constitutes acceptable knowledge in a field of study (Saunders *et al.,* 2007). Epistemological position clarifies the researcher's philosophical assumptions about how they will learn and what they will learn during their investigation (Crewell, 2003). By understanding the

research participants as social actors in this research, it is acknowledged that they are knowledgeable and give meaning to themselves, to others and to the social environment they inhabit. As Hughes and Sharrock (1997, p.104) explain, social actors "*can describe what they do, explain and justify it, give reasons, declare their motives, decide upon appropriate courses of action, try to fit means to ends, and so on.*" This allows for an understanding of business travellers', business travel policy makers' attitudes and practices, as understood through their eyes and interpretation, and as articulated by the travellers/policy-makers themselves in interviews. This research is thus a primarily qualitative study employing interviews.

It has been found that there is lack of academic research in the business travel process management area. The problem statement (Chapter two, section 1.3) has generalised the existing situation with current business travel process management systems and consequently it was decided to adopt a structured approach that is based on recognised business process mapping techniques to help address this aspect. The complete framework provides a holistic approach to guide organisations to identify current limitations of business travel process management and determine necessary actions to select in future.

Axiological position

The axiological position is part of research philosophies and relevant data collection techniques. When discussing the axiological aspect of the research philosophy in this qualitative research, it needs to make values known in the study and reports that all ethical aspects has been considered and researcher's values and biases as well as the value-laden nature of information gathered from the field (Killam, 2013).

3.3.2 Approach Consideration of Current Research

The current research employed an inductive approach, as in this research the researcher collected data and developed a framework as a result of data analysis. This research demanded both quantitative and qualitative answers. For example, the approach used to investigate a research question, 'How much business travel was undertaken in your organisation in the last year? (a) money, b) time c) distance d) carbon emissions e) other)' This is a quantitative question as the answers are related to what tools are needed for the organisations to book business travel, or what are the

objectives of business travel for the organisations. Accordingly, the current research also employed approaches that were mainly concerned with the understanding, belief, opinions, and views of the people, i.e. the approaches used to investigate the research question, what are the current issues related to business travel, or how to develop the current situation in the future. These are all qualitative questions that needed qualitative answers.

3.3.3 Strategy Considering of Current Research

In this research in order to achieve the primary research aim (i.e. to investigate the process implications of business travel within organisations with a view to improving travel practices) the researcher needed to explore the business travel arena: scope of business travel, issues related to business travel, and the current business travel process management practices in organisations. To collect and analyse the data the research strategies has been used in this research at the beginning are literature review and accessing the thinking of various experts in this field by interviews. Furthermore, to strengthen this knowledge a new line of inquiry was included, 'what, how, why and when' in order to develop a broad contextual understanding of current practices and issues of business travel as well as the future opportunities. In this stage an organisational survey was chosen to access the thoughts of organisation travel management members. Survey results provided broader perspective about current business travel process in UK but still some questions remained: 'what is the opinion of end-users to policy makers about their business travel?'. It was also felt necessary to obtain deeper understanding of specific business travel process management related issues in different stages of business travel. So it was equally important to investigate the actual practices via case studies.

3.3.4 Choices of Methods in Current Research (Triangulation Method)

Triangulated method or the mixed method approach was applied to the current study to acquire the richness of the business travel process management in organisations. A qualitative approach was applied to review the issues, process and impacts of the business travel. Then both quantitative and qualitative data collection methods were used to establish the development of conceptual business travel process management (BTPM) framework. Scoping study was undertaken for more verification of literature

review. Then the national survey on business travel gave background of the current business travel process. To verify it more three in-depth case studies were also undertaken.

This research begins with an exploratory study based on literature to identify the existing studies on business travel process management in general. A literature review was undertaken of the business travel process management concept, and included definitions, its importance, characteristics, outcomes and future. Sources of literature are books, journals and conference papers. In addition to the critical analysis of the literature on the business travel process management, the current study uses semi-structured interviews as an approach to gain information from the business organisations from various sectors. This gives the researcher an opportunity to explore answers more deeply. Semi-structured interviews mainly consist of open-ended questions based on topics needing to be covered in the interview (Barbour, 2008). This research adopts qualitative approaches in collecting data as well as in analysing them to produce results because it gives more freedom for the researcher to go in-depth into the topic of study. Qualitative findings are longer, more detailed and variable in content. However, analysis of qualitative data could be difficult because responses are neither systematic nor standardised (Patton, 2002). Respondents' perceptions tend to be different even though they are in the same group. Qualitative data analysis is a search for general statements about relationships and underlying themes (Gibson and Brown, 2009). The qualitative data analysis involves creativity, intellectual discipline, analytical rigor and a great deal of hard work (Patton, 2002). In this research qualitative data come from open-ended questions and reviews.

This research also employed some quantitative data analysis to provide statistical accounts. A combination of qualitative and quantitative analysis gives an idea of "triangulations" which helps to verify the data, information, and methods to look at a problem from different directions (Bryman, 1998). Triangulation increases the validity and reliability of the data, since the strengths of one approach can compensate for the weaknesses of another (Grix, 2010). After undertaking the in-depth interviews it was necessary to collect the broader perspectives of more population's concepts on business travel. For this purposes mixed methods (quantitative and qualitative) has been used to corroboration, expansion or initiation (Hanson *et al.*, 2005). Initiation, in

the form of an iterative, nested, holistic or transformative design (Caracelli and Greene, 1997) requires an integration of methods in contrast to the simpler component designs typically used for corroboration or expansion. The triangulation method was conceived as the conduct of parallel studies using different methods to achieve the purpose, with a view to providing corroborating evidence for the conclusions drawn, i.e. as a technique of validation (drawn from the concept of triangulation in case studies).

3.3.5 Time Horizon for the Current Research

Cross-sectional analysis was undertaken in this research that involves observation of all of a population at one specific point in time.

Interview with 15 experts   National Survey   Three Case studies/Framework Development

2009   *2010*   *2011*   *2012-2014*
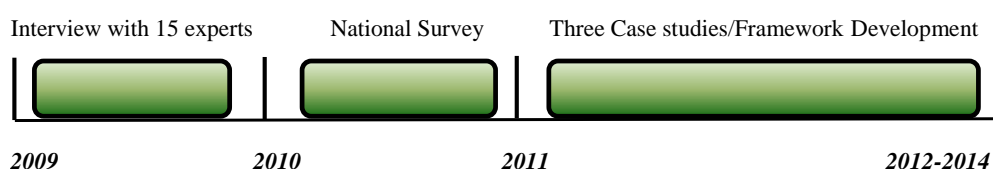
Figure 3.6 Timeline of this cross-sectional research stages

The use of routinely collected data allowed large cross-sectional studies to be made at little or no expense. This was a major advantage over other forms of epidemiological study. A natural progression has been suggested from cross-sectional studies of routinely collected data which suggest solutions, to case-control studies testing them more specifically, then to longitudinal studies and trials which cost much more and take much longer. In this cross-sectional study an expert on business travel is interviewed to see if there are the benefits and bottlenecks of business travel process management. Finally, as a result a BTPM framework has been developed.

Cross sectional studies have been used in business before by Higson *et al.,* (2002), Koufteros *et al.*, (2014) and many others to see different issues and perspectives related to business. A weakness of cross-sectional studies can be that these studies contain individual-level data (one record per individual). However, in modern epidemiology it may be impossible to study the entire population of interest, so cross-sectional studies often involve secondary analysis of data collected for another purpose. In this research previous survey on business travel by DfT, NTS, ONS records has been reviewed.

3.4 RESEARCH METHODS APPLIED IN THE CURRENT STUDY

The chosen methodology was applied in six stages using mainly a qualitative research strategy. According to Creswell (2007, p.15), "*The research design process in qualitative research begins with philosophical assumptions ... Further, in many approaches to qualitative research, the researchers use interpretive and theoretical frameworks to further shape the study*".

To achieve the research objectives, a series of research activities and methods were required which are presented in Table 3.5 along with the output of each objective showing the various stages of the research. The objectives at each of those stages describe the methods utilised to fulfil the objectives. Figure 3.7 represents the overview of research design.

Table 3.5 Research Objectives and the Corresponding Research Activities, Methods and Outputs.

	Objectives	Activities	Methods	Outputs
1	To review business travel and identify the issues, process and impact.	Prepare a detailed literature review, critically analyse previous work, identify gaps, research questions and investigate key factors responsible for poor business travel management and their results on society.	Desktop study to review the literature and previous work on business travel.	Literature Review of business travel benefits and issues. **Chapter 2.**
2	To examine the effect of organisation process on business travel.	Undertake a national survey, identify case study sites, questionnaire design, determine analysis, look at documentation, and identify organisation's process on business travel.	The method used to carry out these activities will comprise three case studies aimed at exploring the current business travel process management in organisations.	Scoping study, prepare the questionnaire for the survey and interviews; these were both web based and paper based. After undertaking the survey three case studies were undertaken within the business organisations to identify in-depth barriers of business travel sector. Finally a framework has been developed from the findings of interviews, survey and the case studies. **Chapters 4, 5, 6, 7, 8, 9.**
3	To develop a framework to improve organisational business travel process within an organisation.	Investigate in detail the impact of a specific information management system for business travel developed by the use of business process models (BPM). A detailed study will be undertaken to investigate the integration of specific BPM applications.	Study in detail specific applications developed by the BPM. Study the uptake of the applications by business organisations. Examine the impact of this on improving the current business travel process management in organisations.	Develop a Business Travel Process Management Framework to recommend the effective use of the business travel process management application for business organisations. **Chapter 9.**

4	To evaluate the effectiveness of the proposed framework delivering in business travel.	Conducting evaluation.	Suggest innovative solutions using evidence base.	New era in business travel management system. **Chapter 10.**
5	To derive recommendations for practice and policy	At this stage the researcher formulates effective business strategies for business travel. This has been done through the development of a Business Travel Process Management Framework. Work also has been carried out to explore and identify areas of future work.	Formulate effective business strategies using strategic frameworks for business travel process management.	Identify future areas for business travel process management in organisations. **Chapter 11.**
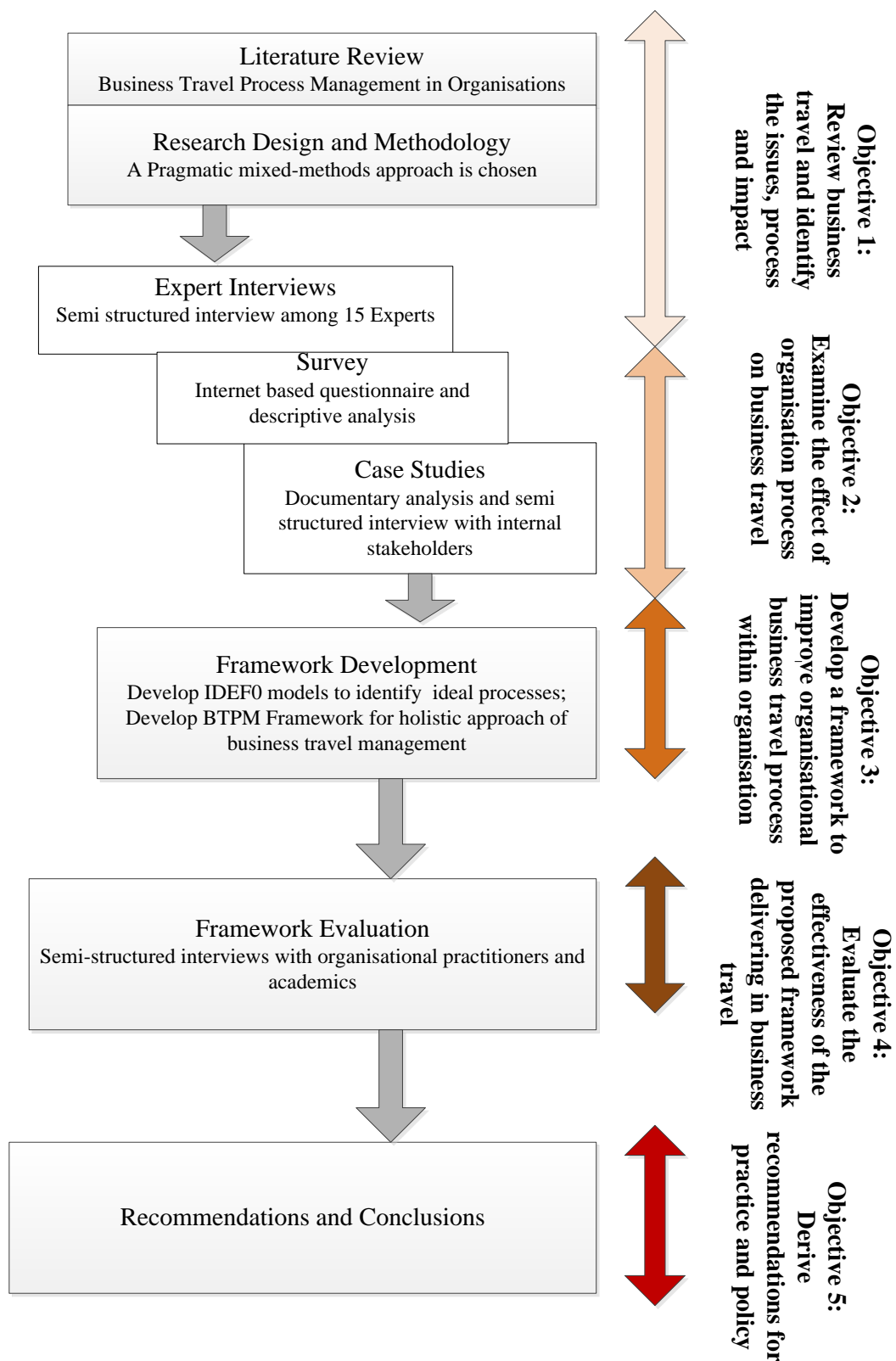
Figure 3.7 Overview of Research Design.

The first step consisted of a thorough literature review (Chapter Two) on the business travel area. It was found that there is a dearth of qualitative research on business travel process management (Aguilera, 2008; Dudley, 2010; Gustafson, 2012). According to Aguilera (2015, p.24), "*Business travel, and long-distance business travel in particular, has received much less attention in research than home-to-work travel*". Gustafson 2012 noted, "There is a growing body of research investigating what consequences frequent business travel may have for travellers with regard to their work situation" (Holley *et al*., 2008; Ivancevich *et al*., 2003), their family relations and private life (Bergström, 2010; Espino et al., 2002), and their personal identifications and orientations (Gustafson, 2009; Lassen, 2010), "*however business travel also has organisational and economic consequences for employers*" (Gustafson 2012, p.276) which had less attention previously. Hence in this research the second step was a series of 15 exploratory in-depth interviews which were conducted with experts as a scoping study (Chapter Four) to provide further orientation (Bogner *et al*., 2009). In the third step, a cross-sectional survey (Chapter Five) was carried out to identify the current business travel practices of organisations from a wide range of sectors. The sectors that contribute on national GDP (ONS, 2010), these 11 business sectors are:

2   Financial intermediation, real estate, renting and business activities (32.4%);

3   Wholesale and retail trade, repairs, hotels and restaurants (14.2%);

4   Education, health and social work (13.1%);

5   Manufacturing (11.6%);

6   Transport, storage and communication (7.1%);

7   Construction (6.2%);

8   Other services (5.1%);

9   Public administration, national defence and compulsory social security (5.0%);

10 Mining and quarrying (2.9%);

11 Electricity, gas and water supply (1.6%); and

12 Agriculture, hunting, forestry and fishing (0.7%).

(Source: ONS, 2010)

In-depth understanding was then sought in step four where three in-depth case studies (Chapters Six, Seven and Eight) were undertaken. In the fifth step, a Business Travel Process Management Framework (Chapter Nine) has been developed. Finally, in the sixth step the evaluation of the developed Framework has been discussed (Chapter Ten). The evaluation process was undertaken with the help of six evaluators from case study organisations and survey organisations who are involved in developing the business travel processes for their organisation and undertake substantial business travel in each year. The evaluators helped to alter, justify and make the evaluation complete for future use.

3.4.1 Ethics in Research

Ethics impact on all forms of social research. A researcher has a set of moral principles that guides them in the choice of how to conduct with regard to such topics as confidentially, anonymity, legality, professionalism and privacy when dealing with people in research (Blaxter *et al*., 1997). The researcher's duty is to respect the people they are studying. More specifically, they need to make sure to ask the explicit permission of their subject first, and then make it very clear how they intend to collect, analyse and disseminate the data they have, generated by talking to them (Grix, 2010). According to Punch (2000, p. 281) "*Some qualitative research deals with the most sensitive, intimate and innermost matters in people's lives, and ethical issues inevitably accompany the collection of such information*." This is not to suggest that quantitative research is devoid of ethical considerations, as issues of confidentiality, honesty and accuracy arise in both types of research.

This research uses a mix of qualitative and quantitative methods and had all ethical clearances before interviewing, surveying and undertaking case studies. The questions to be asked and a description of the process of interviewing were sent out the week before undertaking each interview, and permissions were taken from the interviewees/case study organisations via email. All interviewees and survey participants agreed to share their views but asked for strict confidentiality that has been reserved by the researcher.

3.4.2 The Expert Interviews/ Interviewing Elites

For this study, 'experts' from the business travel sector were selected. According to Bogner *et al.,* (2009), 'experts' are people who process special knowledge of a social phenomenon which the interviewer is interested in. In other words, experts have superior knowledge and expertise that is developed by a process of learning and training in that particular

phenomenon. In this research, the experts were selected on the basis of their experience and in-depth knowledge of the business travel sector. In this case the experts chosen included academics who taught, researched and/or published on the topic and senior managers of organisations who had developed business travel policies and who were therefore very much aware of the pitfalls of the business travel process management systems of their organisations. The experiences and insights of these experts were felt to be useful in teasing out the key issues that need attention when planning business travel. The experts were also actively involved in the introduction and operation of business travel management processes on a national (UK) and global scale. Overall, seven of the 15 interviewees could be classified as being 'observers' of the sector (i.e. academics and policy makers), while the remaining eight were 'senior practitioners' or encounter, provider or undertaker of business travel for a long time (5-10 years). The interviews took place in the UK. How these experts are related to business travel is shown in detail in Table 3.7 The experts have been identified as expert 1-15 to maintain anonymity.

The detailed semi-structured interviews with participants were conducted in one-to-one and in face-to-face settings. Questions asked centred on current business travel process management systems. Data from respondents or interviewees were recorded during the interview session and then analysed. All the data obtained from the respondents were directly transcribed. All data was checked by the researcher listening to the recording (voice recorder) as the notes were read (Patton, 2002).

Thematic analysis was applied to the data. Thematic analysis is the process of systematically reviewing, analysing and interpreting data from open-ended questions, observations and records from all types of human communication (Denzin and Lincoln, 2000). It is used to determine the main facets of a dataset by simply counting the number of times an activity occurs and a topic is mentioned (Fellows and Liu, 2008). Fink (2008) states that in thematic analysis the researcher searches the data from consistently occurring 'themes'. It is a tool used to determine the presence of certain words or concepts within texts or sets of texts.

Table 3.6 Background of Experts and their Organisations.

Role/ Position	Interview Ref	Expertise	Related Sector of organisation
Observers	Expert 1	Academic and a author of book on business travel.	Public Sector
	Expert 2	Academic and senior manager of a Centre for Research in Business Travel	Public Sector
	Expert 3	Academic of transport policy and author of a study on business research on transport	Public Sector
	Expert 4	Academic in business travel area	Public Sector
	Expert 5	Academic of transport strategy	Public Sector
	Expert 6	Chief editor of a Business Traveller Magazine	Private Sector
	Expert 7	Senior member of UK's Premier Network for all organisations working to promote transport policies (Policy Maker)	Private Sector
Senior Practitioners	Expert 8	Senior member of business travel management company (Business Travel Provider)	Private Sector
	Expert 9	Senior member of business travel management company (business travel provider)	Private Sector
	Expert 10	Senior member of large international governmental organisation (user)	Public Sector
	Expert 11	Senior member of UK-based business travel consultancy (business travel provider)	Public Sector
	Expert 12	Senior member of business travel management company (business travel provider)	Private Sector
	Expert 13	Senior member of business development-procurement, hotel (user)	Private Sector

The interview questions were pre-issued and sent to the respondents in order to allow them to think over the questions and so be more prepared in their responses during the interviews. Butcher and Sheehan (2010) state that the purpose of pre-issued questions for the purpose of interviews of participants or respondents is to allow them to gather their thoughts about the subject in advance of the interview.The questionnaire and the themes addressed the following areas:

- Definition of Business Travel;
- Characteristics of Business Travel;
- The Significance of Business Travel to organisations and the biggest obstacles of business travel process management systems;
- Issues related to Business Travel; and
- The future of Business Travel management processes.

(See Appendix 2 for detailed questionnaire)

3.4.3 Survey

Problem Definition or Rationale for survey use

Dudley (2010) and Aguilera (2008) suggest that there is a lack of qualitative research in the field of business travel. The survey questionnaire was therefore designed to ask both qualitative and quantitative questions. Mixed methods often combine legislative and idiographic (explication of individual cases) approaches in an attempt to serve the dual purposes of generalisation and in-depth understanding (Grix, 2010). For this reason, some quantitative data, e.g. the amount of business travel undertaken by the organisation, different modes of travel and tools/techniques of business travel processes needed to identify, at the same time few open ended questions were added to know the individual interviewee's perception and explanations .

Specifically, surveys were undertaken previously to identify business travel markets or survey for travel buyers, air travel market (IATA, 2012; BTN, 2013; Mason and Gray, 1995). No academic survey had been taken across a range of sectors and conducted on business travel process management (see definition on page 44) perspective in UK. Due to this lack of academic research available in the business travel process management arena, a national survey was conducted to gather background information. This survey also helped to identify the case study organisations for in-depth study.

Design measurement or Survey Design

In gathering the required data, a Revealed Preference (RP) questionnaire survey comprising of both closed and open-ended questions was designed and applied. Three general rules (Flick, 2006) were followed to design the survey questionnaire:

a) Open ended questions were used to let respondents define their own frame of reference for answers; however 23 closed-ended questions were used when a quick tabulation of results was required like to know about the amount of business travel undertaken, mileage of business travel, tools used for business travel (detail questions are attached in Appendix 2); and

b) Open-ended questions were employed to gather more detailed views.

c) The flow of questions was smooth and questions asked earlier in the survey would not direct later answers.

The cross-sectional social survey method was carried out, where the research strategy is qualitative. A survey questionnaire was developed to collect data and identify the current process of business travel within the UK organisations analysed. The primary objectives of the survey in this research were:

1. To acquire general understanding about the attitudes towards business travel by national organisations, issues concerning towards business travel by them, and how widely applicable those issues are; and

2. To identify case study organisations and finally use the interviews, survey, case studies for recommendations of the effective business travel process within organisations.

Survey questions emerged from the literature review and scoping study of the 15 experts. After preparing the questionnaire it was piloted by seven individuals: two frequent business travellers, one business travel manager and one tactical administrator, and three academics. In the survey, 20 structured questions were asked about the company's current processes, outcomes, contexts and on the future of business travel. Specifically, questions were asked that related to: a) the business travel management processes used; b) the amount and type of business travel undertaken; c) the factors that influence this; and d) how business travel is likely to evolve in the future.

The first section collected all the basic details of each organisation. This included the location, turnover, total employees of the organisation and information about the respondents.

The second section covered all the questions related to the current business travel process. The third section covered the outcomes, impacts of current business travel for example, the proportion of using various modes for business travel and other outcomes of the current business travel process. The fourth section covered economic, social, environmental and political factors and finally the fifth section covered the future of business travel, such as the need for the change and the possible aid from the government expected. (See Appendix Two for full list of survey questions).

After undertaking the survey, the survey organisation's policy documents were also reviewed for further insights into the business travel policies of the survey organisations. Of the 41 organisations contacted, 21 organisations provided their written business travel policies, ten organisations mentioned they do not have business travel policies and another ten organisations mentioned that they cannot share their policy document for confidentiality reasons. The policy documents were also analysed thematically.

Sample Selection or Sampling Strategy

The sampling strategy used in the research should naturally flow from the chosen research design and research methods, and should also take account of ethical considerations. Miles and Huberman, 2014 noted that there are two major groups of sampling techniques that can be used to select the units that will be included in a sample:

- Probability sampling techniques, which include simple random sampling, systematic random sampling, and stratified random sampling.
- Non-probability sampling, which include quota sampling, self-selection sampling, convenience sampling, snowball sampling and purposive sampling.

In this research, two non-probability sampling strategies were adopted in sequence, as these were deemed to best fit the survey population in view of the limited resources available. Moreover, qualitative samples are more likely purposive, rather than random (Kuzel, 1992; Morse, 1989) and "*social processes have a logic and a coherence that random sampling can reduce to uninterruptible sawdust*" (Miles and Huberman, 2014, p.27).

Accordingly, the first strategy was 'stratified purposeful' in which the samples are collected from illustrated subgroups in order to facilitate comparisons and to allow an analysis to be undertaken across a full spectrum of organisational types (Miles and Huberman, 2014). Specifically, the sample aimed to make sure that representative organisations were gained

from each of the biggest 11 business sectors (see response rate on page 120, Table 5.2) that contribute to national GDP (ONS, 2010), whilst other characteristics were also monitored to ensure that a mix of small, medium and large, private and public organisations and rural versus urban organisations was secured. The table below serves as a useful guide to business size nomenclature given by the European Union (2003).

Table 3.7 Organisation size definition by European Union (2003).

Organisation size	Employee Number	Definition
Small	<50	A small organisation is defined as an enterprise which employs fewer than 50 persons and whose annual turnover and/or annual balance sheet total does not exceed EUR 10 million.
Medium (SMEs)	<250	The category of medium-sized enterprises (SMEs) is made up of enterprises which employ fewer than 250 persons and which have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million.
Large	>250	The category of large-sized organisations made up of enterprises which employ more than 250 persons and which have an annual turnover over EUR 50 million, and/or an annual balance sheet total is more than EUR 43 million.

Meanwhile the second strategy applied was that of snowball sampling. This is because the population of interest proved to be hard-to-reach and/or hidden, and in these situations snowball sampling – whereby where one organisation was selected and was then requested to pass the survey link to another relevant organisation – can be used to gain access to such populations. Specifically, snowballing strategies can help to identify cases of interest from people who know which cases are information-rich (Miles and Huberman, 1994).

In applying these strategies, it should be noted that only the individuals involved in managing business travel for each organisation has been asked to response the survey to avoid incorrect data. The questionnaire emerged from the literature review findings in Chapter Two. This sampling involves selecting questions that meet some predetermined criterion of importance (Patton, 2002). The reason for asking pre-determined questions is that the criterion sampling can be useful for identifying and understanding cases that are information rich. Criterion

sampling can provide an important qualitative component to quantitative data. Criterion sampling can also be useful for identifying cases from a standardised questionnaire that might be useful for follow-up. Respondents were encouraged to complete an online survey form. The reasons for using online survey were:

- Online surveys have the potential for fast turnaround than any other survey methods. The time span needed to complete an online survey project is on average two-thirds shorter than that of a traditional survey method. This is because the information is being gathered automatically; researchers don't have to wait long for paper questionnaires to come back. The response rate is almost instant. The data is instantly available and can easily be transferred into specialised statistical software or spread sheets when more detailed analysis is needed.

- Online surveys are cost effective. The researcher can save money on postage and the results are accessible at any time. Respondents input their own data. Analysis thus becomes easier and can be streamlined, and is available immediately.

- If the sample size is fairly large and widely distributed geographically, then an online survey is a good option.

- There is a smaller margin of error because participants enter their responses directly into the system.

- The results of the online survey are ready to be analysed at any time. The data can be presented in graphs or tables, and most online survey tools also offer cross tabulation analysis tools to create contingency tables.

- With online surveys, participants can pick a time that suits them best and the time needed to complete the survey is much shorter.

- The data is instantly available and can easily be transferred into specialised statistical software or spread sheets when more detailed analysis is needed.

(Sue and Ritter, 2012)

The survey questionnaire was distributed to 200 UK organisations across the eleven business sectors and the numbers of organisations selected in each sector roughly matched the proportion of GDP contributed by each sector. As a first step, business travel managers of each member of the FTSE (2010) top 100 organisations were contacted by email or telephone. All together ten responses were received. Due to the low number of responses, another 100 organisations were selected through a 'snowballing' sampling approach, whereby organisations

were recommended by respondents who had already undertaken the exercise, and from this process a further 31 responses were generated. In total 3 to 5 responses from each of the eleven sectors were targeted. However, no response was received from two sectors which are mining and quarrying and agriculture, and hunting, forestry and fishing. Altogether 41 organisations responded to the survey. Table 3.8 outlines the organisations contacted and which responded from 11 sectors by ONS categories (ONS, 2010).

Table 3.8 The organisations approached and which responded from the 11 ONS categories.

Sectors (ONS, 2010)		Approached FTSE	FTSE organisations responded	Approached Other organisations	Other organisations responded	Total responded
1	Financial intermediation, real estate, renting and business activities (32.4%)	21	3	10	3	6
2	Wholesale and retail trade, repairs, hotels and restaurants (14.2%)	23	3	8	1	4
3	Education, health and social work (13.1%)	3	1	12	6	7
4	Manufacturing (11.6%)	8	2	10	4	6
5	Transport, storage and communication (7.1%)	11	0	11	10	10
6	Construction (6.2%)	5	0	9	3	3
7	Other services (5.1%)	1	0	8	0	1
8	Public administration, national defence and compulsory social security (5.0%)	8	0	8	3	3
9	Mining and quarrying (2.9%)	7		8	0	0
10	Electricity, gas and water supply (1.6%)	12	1	8	0	1
11	Agriculture, hunting, forestry and fishing (0.7%).	1	0	8	0	0

Concern for respondents

The respondent's names and organisations were name kept anonymous for confidentiality. Detail was given on ethics on research in section 3.5.1.

3.4.4 Case studies

The third step involved a detailed case study of three UK organisations. The case studies were undertaken to examine the effect of organisation process on business travel. The survey results gave a breadth of knowledge about people's perception and opinion over existing business travel management processes. However, a detailed observation was then needed to see the depth of the current situation, to find out the difficulties faced by poor management and also to explore the potential impact of future needs of the user.

Here, the '*comparative*' or '*multiple-case*' studies were undertaken (Yin, 2003, p.45). The reason for undertaking multiple case studies was because multiple- case study results are often more robust. To explain the multiple case study design, Yin (2003, p.45) suggested, "*Every case should serve a specific purpose within the overall scope of inquiry. Here, a major insight is to consider multiple cases are one would consider multiple experiments – that is, to follow 'replication logic*'. According to Yin, the logic underlying the multiple-case studies is that each case must be selected carefully so that it either, a) predicts similar results or b) produces contrasting results but for predictable reasons.

For this research, organisations were selected from the different business sectors that have a contribution to the national GDP and participated in the survey. The survey results gave the background of the organisations that helped to identify the case study organisations. Three business sectors from the top four of eleven sectors were selected, namely 'Education, health and social work', 'Manufacturing' and 'Financial intermediation, real estate, renting and business activities'. No representative organisation from the 'Wholesale and retail trade, repairs, hotels and restaurants' sector was willing to be involved when approached.

The reason for selecting three organisations was to allow literal replication to be applied (Yin, 2003). The replication logic is analogous to that used in multiple experiments (Hersen and Barlow, 1976). Thus, according to Yin (2003), if one has access to three cases, the appropriate research design is one in which the same results are predicted for each of the three cases, thereby producing evidence that the three cases did involve the same syndrome. If similar results are obtained from all three cases, replication is said to have taken place.

On the basis of employee and turnover one large organisation and two medium organisations were selected. The answers of expert interviews in the scoping study (question no. 9, Appendix 1) helped to identify the nature of the organisations. Also the survey results provided the information about which organisations have good, medium or ad-hoc business travel practices. Amongst the three selected organisations, two organisations have good business travel practices, and the other has medium standard practice. Three organisations are selected to receive similar results to apply the replication logic. These certain cases were predicated to have similar results because all organisations were from sectors that provide a similar contribution to the national GDP and have similar business travel practices.

Each case study comprises:

- Documentary analysis (organisation's policy documents of current year and previous year's before being altered, annual report on business travel issues 2010, 2011, press release, 2010, 2011);
- In-depth interviews at the management level (see Table 3.3 for interviewee numbers and roles); and
- In-depth interviews at the user level (see Table 3.3 for interviewee numbers and roles).

The reason for selecting these interviewees was based on the literature review and scoping study results. According to Yin (2003) in multiple case studies a number of respondents are assumed to represent a larger pool of respondents, so that data from a smaller number of persons are assumed to represent the data that might have been collected from the entire pool. Mason (2010) mentioned that the internal stakeholders of business travel are travellers, tactical administrators, travel managers, procurement managers and chief finance officers, whilst the scoping study result also supports this.

Seven interviewees with different roles were interviewed in each organisation. Table 3.9 gives the details of the number and role of the case study interviewees.

Table 3.9 Case Study Interviewees and Roles

Management level		User level	
Policy Maker (Director)	1 persons	Experience user	2 person
Strategic Administrator (human resources/finance)	2 persons	New user	1 person
Tactical Administrator (admin/sales)	2 persons		

The survey preceding the case studies gave an overview of current business travel practices in UK organisations. Moreover, whilst the survey results gave a generic idea about the current situation, it also revealed that there are still some barriers that the organisations need to overcome. For instance, some organisations are not aware of how to save money in terms of determining whether a trip is essential. Thus there is a need for in-depth information to be collected and analysed.

The aim of the case studies was to investigate the current practices of business travel management processes in detail within two organisations. Three specific objectives were associated with undertaking the case studies:

- To identify how organisations currently manage their business travel, their objectives of travel and if their objectives are fulfilled;
- To determine the bottlenecks/barriers of the current process, if there any revisions that are needed to address business travel and/or user needs; and
- To identify a system that can overcome the current barriers in future.

For each case study the findings are shown in four steps. First to analyse the current business travel policy of the organisation, then discuss the process of undertaking business travel, third is to analyse the outcome of business travel and finally what would be the future or how to overcome the barriers in the future has been discussed. These steps are shown in the diagram (Figure 3.8) below:
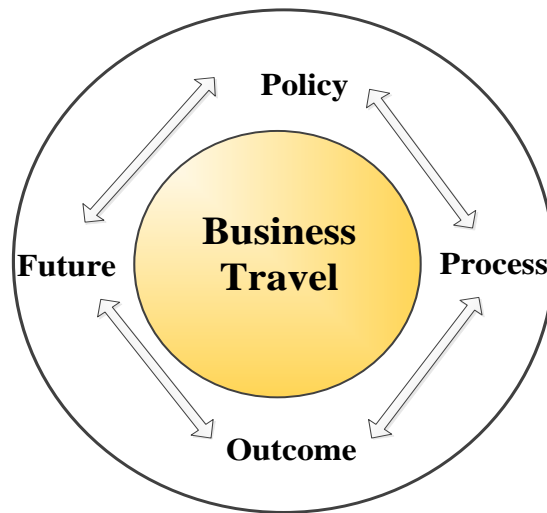
Figure 3.8 Four Steps of Business Travel.

Rationale for Selecting the Case Study Organisations

This section introduces the specific methods. Similar to Ruikar *et al.,* (2005), the case studies were carried out in two stages, a) *Initial Review* Process; and b) *Impact Review* Process (Figure 3.9).

The *Initial Review* process presents the analysis and a detailed study on business travel process management within the three case-study organisations. This was based on a documentary analysis of policy documents, annual reports on business travel issues, and press releases. The *Initial Review* process developed a broader understanding of the case study organisation's policies, guidelines and current business travel practices.
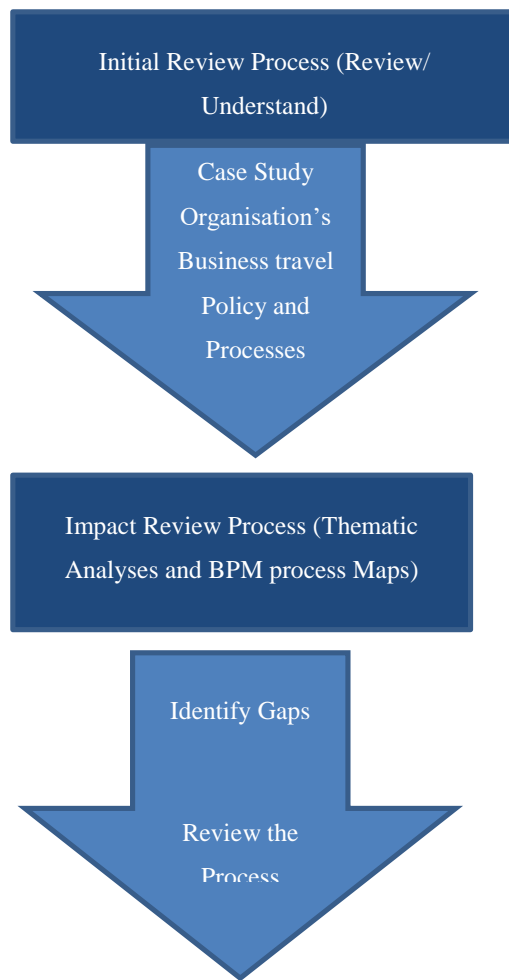
Figure 3.9 Stages of Case Studies.

To obtain detailed information about current business travel management processes and the barriers, and to develop an improved business travel management process, the secondary review process was carried out. In this process, semi-structured interviews were undertaken with policy makers, strategic administrators, tactical administrators and with travellers. Interviewees were selected on the basis of the role they played in the process. To understand the top level activities, one policy maker and two strategic administrators were interviewed from each organisation. Also, two tactical administrator members from each of the organisations were interviewed as these individuals book the travel for the end-users. Finally, for the end-user's opinion, one new traveller/user and one experienced/frequent traveller were interviewed from each organisation. Experienced users travel every month and at least have been working in the organisation for 5-10 years. New users are newly appointed, have travelled once or twice and have been working less than 12 months.

Case study data was collected at two different levels in the selected organisation, namely: a) Strategic Level b) Implementation Level (Figure 3.10)

Figure 3.10 Business Travel Management and Operation Levels.

On a strategic level, the business travel strategy/policy is determined by the policy makers and strategic administrators. At the Implementation Level the travellers undertake business travel by applying the travel policy. Travellers, tactical administrators and travel management companies (TMCs) are involved at this level. The business travel plan and business travel targets act as integrators in between the Strategic Level and the Implementation Level.

The interview data was analysed by 'thematic analysis', a widely used qualitative analysis method (Denzin and Lincon, 2000; Crabtree and Miller, 1992) (The definition of thematic analysis has given in section 3.5.2). The case studies were undertaken to find out the organisation's viewpoint on ideal business travel process management. After reporting the key findings of the case studies the chapters (Chapters Six and Seven) revealed the lesson learnt from the case studies and some IDEF0 process models (a definition of IDEF0 is given in section 3.5.5) that show the current business travel practices in these organisations. Finally Chapter Eight combines all the case study results to establish a framework for ideal business travel process management.

The rationale for selecting the target organisations included three criteria:

- The organisations participated in the survey (Chapter Five) and filled-in the survey questions they also expressed their interest in a follow-up study;

- The selected case studies organisations (two large and one SME) have evidence of standard business travel practices, thus allowing key lessons (Yin, 2003) to be learned from their practices regarding business travel. Specifically, examples from their business travel practices can be used to develop a new system that could be beneficial

for any standard and medium-practiced organisation. Also, if gaps are identified in a good/standard practiced organisation, it will be easier to recommend strategies to the medium practiced organisations which could help to solve any organisation's business travel related issues; and

- A research based educational organisation, a leading manufacturing company and one finance/service organisation were selected as case studies for this research. Organisations from three different sectors were selected because the nature of an organisation's practices tends to vary in these different sectors. In particular, the organisation's structure, needs and objectives are very different from each other (Beaverstock *et al.,* 2010). These differences helped to analyse results in compare and contrast. According to Yin (2003 p.5), in multiple-case design "*the cases should serve in a manner similar to multiple experiments, with similar results (a literal replication) or contrasting results (a theoretical replication) predicted explicitly at the outset of the investigation*".

Also, organisational aspects (e.g. existence of diverse units, their number or geographical distribution), hierarchical position, income and gender are the parameters by which a need for business travel can be judged (Aguilera, 2008).

For the educational organisation business travel lies with individual school's tactical administrator, who uses the policy agreement created by finance. However for the manufacturing organisation, human resources, purchasing and finance departments manage the business travel processes (Figure 6.4). In terms of the current objectives, evidencing value for money against individual-booking is vital for the educational organisation; similarly, the manufacturing organisation-developed online self-booking software which is cost effective and easily can connect the travellers with their line managers, strategic administrators and TMCs. Cost reduction and compliance improvement, i.e. security of the traveller are important for both case study organisations (findings from the survey results, Chapter Five). Thus all organisations have their similarity about business travel management processes which provides "*replication logic*" (Yin 2003, p.47). Studies on the issues among these three organisations will therefore help to identify a process that can apply in general to a whole range of organisations.

3.4.5 Business Process Modelling (BPM)

From the literature review it was found that the there is a possibility that business organisations will have an adverse impact on the overall performance, if an appropriate method is not employed to undertake business travel (Deborah, 2014; Gustafson, 2013). A method is necessary to do this properly. To fulfil this criterion a theoretical framework has been developed in this research. To develop the framework the case study results have been compared and analysed using some process maps or business process models (BPM). These BPMs help to identify the 'as is' situation, and to look at ways in which the new framework can be applied to all levels of business organisations to solve the business travel problem.

Business process modelling gained importance in the management community (Hammer, 1990) for its better understanding by an 'explicit representation' of process maps. BPM techniques and the former aims could be improved or designed/redesigned (Nurcan, 2005) by various application of BPM techniques. Kokolakis *et al.,* (2000) identifies six tasks that a company can achieve by using a BPM. These are:

1) Analyse and examine the organisation in detail;

2) Identify and analyse any barrier;

3) Evaluate units that needs re-visiting;

4) Re-design processes more securely;

5) Assess the effectiveness and efficiency of counter measures, and

6) Develop secured policy.

In this research, with the help of business process modelling three sets of process maps were developed for each case study. These process maps graphically represent the business travel process of each organisation and helped to compare and contrast each case study's business travel processes. Finally another set of process maps were developed for the framework that helped to re-design the business travel process and finally helped to give recommendations for the policies.

Several BPM techniques were developed over time (Rumbaugh *et al.,* 1991; Ramesh and Dhar, 1992; Armenise *et al.,* 1993; Bubenko, 1994; Jarzabek and Ling, 1996; Jacobson *et al.,* 1993; Eriksson and Penker, 2000). Most of the process models concentrate on who does

'what' and 'when' to establish the as is process. Once the barriers are identified, it is easier to plan for the future and to improve the situation.

Here is a list of business process modelling approaches/techniques that are used in business organisation by managers:

- Flow chart technique;

- Data flow diagrams- Yourdon's technique;

- Role activity diagram - RAD;

- Role interaction diagram - RID;

- Gantt Chart;

- IDEF (Integrated Definition for Function Modelling);

- Coloured Petri-net-CPN;

- Object oriented method, and

- Workflow technique.

Table 3.10 provides the advantages and disadvantages of BPM techniques.

Table 3.10 Comparative analysis of BPM techniques (Source: Adapted from Aguilar-Savén, 2004).

BPM techniques descriptions	Advantages	Disadvantages
Flow charts: A formalised graphic representation of a programme logic sequence.	It uses a sequential flow of actions.	Does not support a breakdown of actions.
Data flow diagram: This diagram shows the flow of data or information from one place to another.	Data flow diagrams shows what kind of information will be input to and output from the system, where the data will come from and go to, and where the data will be stored.	They do not show information about the timing of process or information about whether processes will operate in sequence or in parallel They only show the flow of data, not material.
RAD: Based around a graphic view of the process from the perspective of individual roles, concentration on the responsibility of roles and the indications between them.	RAD provides a different perspective of the process and they are particularly useful in supporting communication. This method excludes business objects, which are manipulated by the process, as machines or products.	The process is presented as a sequence of activities. Not letting a decomposition of the process (or depends on individual performances for identifying business requirements) and thus it makes an overview different. These modelling techniques require highly skilled developers/designers. Also inapplicable to cheaper projects as cost of modelling and automated code generation is very high.

RID: Slightly more complex than flow diagrams.	Rapid interaction diagrams are models that describe how a group of objects collaborate in some behaviour. One of the great strengths of an interaction diagram is its simplicity; RID are easy to understand.	RID diagrams typically used for a single-use case. Another weakness is, although RID diagrams are good at describing behaviour: they do not define it. They typically do not show all the iteration and control that is needed to give an computationally complete description.
Gantt Chart: Matrix that lists on the vertical axis all the tasks or activities to be performed in a process.	They are very simple graphic representations.	They do not show clear dependence between activities.
IDEF: A family of methods that supports a paradigm capable of addressing the modelling needs of an enterprise and its business area.	This modelling shows high level activities of a process indicating major activities. The process can further decompose to show lower-level activities. These models are composed of three types of information: graphical diagrams, text and glossary.	At some point the required view may require another notation to portray such things as branch control.
CPN: A graphical oriented language for design, specification, simulation and verification of systems.	Is particularly well suited for systems that consist of a number of processes, which communicate and synchronise.	There were no data concepts and hence the models often become large. And, there were no hierarchy concepts, and thus it was not possible to build a large model via a set of separate sub models with well-defined interfaces.
Object Oriented Method: Creates models and programmes; a process of objects, which are transformed by the activities along the process.	The fundamental construct is the object which combines both attribute data and operational data, which men structural and behavioural representation is possible in a single entry.	Complex diagram.
Workflow technique: A flow task between computer applications or people in an organisation.	Work not forgotten, shorter learning time, easier to make changes, decentralisation, can be used in combination with other systems.	Lost human contact, lack of motivation, feeling controlled.

According to Nurcan (2005, p. 628), "*Despite the fact that process modelling appears to be a corner stone to help managers improve operational performance, it is demonstrated to be insufficient to help organisations facing the awesome challenge of competitiveness in a constantly changing environment*". BPM models can help to organisation's management to re-design their business travel process. Among various types of process modelling, IDEF seems more suitable to use for business travel process modelling. research.

IDEF modelling

Integration DEFinition refers to a family of modelling languages in the field of systems and software engineering (IEEE, 1998). They cover a wide range of uses, from functional

modelling to data, simulation, object-oriented analysis/design and knowledge acquisition. These 'definition languages' were developed under funding from the US Air Force and although still most commonly used by them, as well as other military and United States Department of Defense (DoD) agencies, are in the public domain.

The most-widely recognised and used components of the IDEF family are IDEF0, a functional modelling language building on SADT (Structured Analysis and Design Technique) which addresses information models and database design issues. The IDEF methods have been defined up to IDEF0 - IDEF10 in Table 3.11 (Source: Mayer, 1992 and KBSI, 2015).

Table 3.11 Classification of IDEF (Source: Mayer, 1992 and KBSI, 2015).		
IDEF Number	Name	Description
IDEF0	Function modelling	The IDEF0 Functional Modelling method is designed to model the decisions, actions, and activities of an organisation or system.
IDEF1	Information Modelling	IDEF1 is primarily focused on support of the task of establishing the requirements for what information is or should be managed by an enterprise.
IDEF2	Simulation Model Design	The third IDEF2 is originally intended as a user interface modelling method. IDEF2 represents the time-varying behaviour of resources in a business system, providing a framework for specification of math model-based simulations.
IDEF3	Process Description Capture	The IDEF3 method is a scenario-driven process flow description capture method intended to capture the knowledge about how a particular system works.
IDEF4	Object-Oriented Design	IDEF4 designs the component-based client/server systems. It has been designed to support smooth transition from the application domain and requirements analysis models to the design and to actual source code generation.
IDEF5	Ontology Description Capture	A method to develop and maintain usable, accurate, domain ontologies. In IDEF5 the meaning of the term "ontology" is characterised to include a catalogue of terms used in a domain, the rules governing how those terms can be combined to make valid statements about situations in that domain.
IDEF6	Design Rationale Capture	A method to facilitate the acquisition, representation, and manipulation of the design rationale used in the development of enterprise systems. Rationale is the reason, justification, underlying motivation, or excuse that moved the designer to select a particular strategy or design feature. More simply, rationale is interpreted as the answer to the question, 'Why is this design being done in this manner?' Most design methods focus on what the design is (i.e. on the final product, rather than why the design is the way it is).
IDEF7	Information System Auditing	IDEF7 is used for data modelling, which captures the logical view of the enterprise's data and is based on an entry relationship model.

IDEF8	User Interface Modelling	A method for producing high-quality designs of interactions between users and the systems they operate. Systems are characterised as a collection of objects that perform functions to accomplish a particular goal.
IDEF9	Business Constraint Discovery	IDEF9 is designed to assist in the discovery and analysis of constraints in a business system. A primary motivation driving the development of IDEF9 was an acknowledgment that the collection of constraints that forge an enterprise system is generally poorly defined. The knowledge of what constraints exist and how those constraints interact is incomplete, disjointed, distributed, and often completely unknown.
IDEF10	Implementation Architecture Modelling	A method that targets the modelling and design of computer and communication networks. It can be used to model existing ('as is') or envisioned ('to be') networks. It helps the network designer to investigate potential network designs and to document design rationale. The fundamental goals of the IDEF10 research project developed from a perceived need for good network designs that can be implemented quickly and accurately.

Analysing by IDEF0 modelling helps to find any 'bottlenecks', which might include activities which are unnecessary and/or which are duplicates (Kim and Jang, 2000). According to Osullivan (1991, p.162), *"The IDEF0 approach not only presents a common perspective on project implementation for the various people involved, but also, and very importantly in the context of manufacturing, helps with keeping track of project goals and objectives"*. IDEF0 is usually used for function modelling methods to define functional requirements (Lu and Liao, 2009). Further analysis and design can also be done by IDEF0 diagrams by specifying the functional requirements and options with a hierarchically (the hierarchical structure facilitates quick mapping in high level) decomposing process. Here the decomposition means taking an activity and breaking it into it subsectors in order to define its internal structure. The 'parent' diagram is decomposed into 'children' diagram/activities and interactions. Sequencing or grouping is important here as each activity precedes and follows the another. After developing several IDEF0 maps it may found few activities/processes are needed or the practice in business is not important. These activities then can be removed and the model re-designed with only important activities. This process is called 'disintermediation' or removal of intermediaries in a supply chain.

3.5 ORIGIN AND METHOD OF CONCEPTUAL (BTPM) FRAMEWORK

According to Yin (2003, p 46), *"an important step in replication procedures of multiple case studies is the development of a rich, theoretical framework. The framework needs to state the conditions under which a particular phenomenon is likely to be found (a literal replication) as well as the conditions when it is not likely to be found (a theoretical replication). The theoretical framework later becomes the vehicle for generalizing to new cases, again similar to the role played in cross-experiment designs"*.

This research used multiple case studies and triangulation methods to replicate the results. The business travel processes of three case studies have been graphically represented and the replications examined. Finally, a conceptual framework, (see Chapter One, Section 1.7 for the definition and rational of the conceptual framework) has been developed that can be practised by any large or SME organisation in any sector. For the theoretical underpinning the four phases defined by Fischer *et al.,* (2007) about agenda setting, process formulation, process implementation and evaluation of travel policy and practice (Detail description has given in Section 9.3, Chapter Nine), has been aligned with the IDEF0 concepts.

The evaluation of the framework helped to verify the new approach in business travel process management.

3.6 EVALUATION OF FRAMEWORK

According to Trochim (2006), evaluation is a systematic endeavour and uses the ambiguous term 'object' which could refer to a programme, policy, technology, person, need or activity. All evaluation work involves collecting and sifting through data, making judgements about the validity of the information and of inferences a researcher derive from it. The framework in this research has been evaluated and verified through the use of empirical data, observations, or experiment need to confirm the truth or rational justification of the research. Scientific beliefs must be evaluated and supported by empirical data (Punch, 2009). Ideally, the fact is the statement in research is needed rationally warranted ought to make it likely that the statement is true (Trochim, 2006). For the verification the evaluation process has been undertaken among the case study organisations along with other organisations, so that the researcher found all the gaps and boundaries among the process and identified the solutions and checked with the organisations that if it could be accepted or not.

For the evaluation in this research, semi-structured interviews were used. The proposed frameworks were evaluated through a series of expert interviews. A set of evaluation questions was compiled and distributed to managers involved in business travel in case study and survey organisations, also academics in the field of process modelling were interviewed. The questions were related to content, effectiveness, capability and use of the framework. To obtain feedback from the framework, one-to-one detailed semi-structured interviews were held with users in the UK. All interviewees were provided with the information about the proposed framework and evaluation questionnaire prior to the interviews. Selection of evaluators was made based on their impartiality and expertise in the area of the research made (Bamberger *et al.,* 2006). After that, all data were recorded and transcribed. The evaluation was made to seek views and suggestions from experts on the usability and capability of the framework to be implemented in organisations. The data were used as well for framework improvement.

3.7 SUMMARY

This chapter outlined the methodological considerations and research design (Figure 1.1, Chapter One) of the current thesis. The research onion process was applied to guide the

review of research philosophies, approaches, strategies, research choices, time horizon and methods. A multi-methodology research approach was identified as the most appropriate for the current thesis by combining Expert Interviews, Survey, Case Studies, and BPM Modelling for Framework Development, and semi-structured interview for evaluation of Framework.

CHAPTER FOUR

SCOPING STUDY

4.1 INTRODUCTION

From the literature review it was found not a lot is known about the process of how organisations manage travel undertaken in the course of work (Gustafson, 2012). Accordingly, this chapter reports the results of a scoping study, i.e. a series of interviews conducted with experts in the field, which was undertaken to provide a vision of business travel process management in organisations.

4.2 PROBLEM DEFINITION

An initial review of literature suggests that further research is needed on business travel and on how businesses deliver better opportunities and development (Beaverstock *et al.*, 2010). Specifically the key research gaps identified were:

(1) a lack of clear understanding of the benefits and barriers related to organisational business travel; and

(2) a lack of understanding how organisational practices influence business travel.

The aim of the expert interviews is therefore to address these, so as to explore the scope, significance and characteristics of business travel. Fifteen expert interviews were conducted.

4.3 METHODOLOGY

Previous work in the sector suggests there is a dearth of qualitative research in business travel (Gustafson, 2012; Beaverstock *et al.*, 2010; Bogner *et al*., 2009; Aguilera, 2008; Swarbrooke and Horner, 2001). Hence a series of exploratory in-depth interviews was conducted to provide orientation. The reason for selecting the experts has been described in Methodology Chapter, section 3.5.2. The experts have been identified as expert (E) 1-15 to maintain anonymity (Table 3.7, Section 3.5.2, Chapter Three).

In the event, five of the fifteen interviewees were female while the remaining eight were male. All interviewees were experts (see Chapter Three, Section 3.5.2 for the definition of

expert and how the experts were selected) in the business travel field and also frequent business travellers.

The interviews were mainly carried out between July and December 2010, using a semi-structured approach. Thus, a number of core questions were asked based on the initial literature review findings, but a significant degree of flexibility by the interviewer was incorporated to allow the interviewees to elaborate further and even to develop new themes where they felt it necessary to do so (Wengraf, 2004).

The interview data was analysed by 'thematic analysis' a widely used qualitative analysis method (Denzin & Lincoln, 2000; Silverman, 2010; Crabtree and Miller, 1992) as mentioned in Chapter Three, Section 3.5.2.

4.4 KEY FINDINGS AND ANALYSIS OF THE SCOPING STUDY

Analysed themes of the interviews are described below.

4.4.1 Definition of Business Travel

The literature review chapter (Chapter Two, Section 2.2.1) discussed the definitions of business travel. To add more insight, interviewees also asked about the definition of business travel. Table 4.1 gives the definition of business travel by all interviewees.

Table: 4.1 Definition of Business Travel by all Interviewees.

Interviewees	Definition of Business travel
E1	Business travel can be any form of interaction that involves business task-like meetings, conferences, site visits and training.
E2	Business travel is anything related to travel for the purpose of businesses.
E3	Business travel relates all types of work-related travel. Industries like rail, airline occupations would be transporting goods as cheaply and effectively as possible which are business travel. On the other hand more commercial service industries have more individual business travel where people commute or travel between different locations. The individual commuting and from work to travel different business locations has very big difference between those two, very different sorts of categories. Also, there is difference in priorities of occupations between commercial and service industries, such as an office, a bank, education, health where the major occupation would be individual travel, with other categories like logistical travel. So business travel has very broad nature.
E4	Business travel is travel from work for a face-to-face meeting, also site visits. Site visits are

	harder to substitute by technology.
E5	Business travel is for meetings, attending trainings and site visits.
E6	Business travel is whenever the travel involves some kind of business elements. So either something to do with someone's job, or there is an intention to travel other than pure pleasure. Things like going to meetings, conferences, and secure instances/order. Sales people who sell a certain amount during the year, and have a reward like a trip to Hawaii with their partner, that will also counts as business travel.
E7	Business travel is any movements within business. The mileage the traveller is doing within the business like going to meetings, site visits. Freight and commuting are also included in business travel. Organisations should know how people commute to work and also need to know how they are doing the freight.
E8	This is travel by an employee to undertake a business task, and has been divided into two categories: business travel people and business travel service. Business travel people - Travel by an employee to meet with colleagues, clients, customers and suppliers or attend conferences and other events. Business travel service- Travel by an employee to maintain a company's infrastructure and/or services, or visit a location to undertake a task.
E9	Business travel refers to any type of travel that someone undertake on behalf of their employer to perform the duties of a job. Meetings, training, conference and events are major contributor. In terms of hospitals it is different, like bringing patients in the hospitals is also business travel.
E10	Business travel is any official missions that are undertaken as part of delivering the work. Business travel can be anything from participating in a meeting, to give vestry services for reconstructions or participating in peace negotiations. Also emergency assistance like the world food programme gives emergency food supplies to tribulations areas that are also official travel. So every time the organisation pays the cost of travel, then it is an official mission and business travel.
E11	Travelling broadly either in between different sites of the organisations, or meetings, going to events or training. Business travel broadly fits into those three categories. Business travel is a way of communication.
E12	Business travel is everything that organisations spend money on for the activity like business interaction outside of its premises. In other words it is not just the airline tickets, train tickets, hotels, it is all the cost incurred to undertake the business travel outside the premises. Business travel is normally consumed by employees other than the customers. However, particularly industries that may offer transport for the customers.

E13	Business travel is the act of travelling for business through a geographic region or moving from one place to another to achieve business success by meeting prospective buyers, site visits, conferences, training projects.
E14	Business travel is trips undertaken in the course of work other than the commuting and freight.
E15	Travelling to meet suppliers, clients and the travel cost is paid by the company. Commuting and freight travel does not incorporate business travel.

From the interviews conducted, it can be seen that E1 sees business travel as being "*any form of interaction that involves a business task*". This includes regular activities that can occur on a daily basis or weekly basis and one-off business travel trips to exotic locations. According to E1, "*Exotic means to visit places like Abu Dhabi or Paris but in terms of developing business or for new business opportunity*". Similarly, E4 and E5 saw business travel as being travel necessary to conduct business and that is related to meetings (internal, external), conferences, site visit and training. E11 elaborated that "*business travel is travelling broadly either in between different sites of the organisations, or meetings, going to events or training, and business travel is a way of communication.*"

E2 largely agreed, defining business travel as anything related to travel for the purpose of the company and its business, but added that while commuting, freight, and fleet management are not considered to be business travel they are however recognised as being included as part of the travel management process. S/he also acknowledged that the scope is variable, and explained that some specialist organisations include commuter travel and freight transport as a part of business travel.

E6 added that often tourism also could be a part of business travel. For example, a sales person who has met a sales target could be rewarded with a family trip to an exotic location that will count as business travel. On the same lines, as a member of a large international government organisation E10 sees business travel as an "*official mission*" and business travel can be anything from participating in a meeting or conference, to undertaking reconstruction projects or participating in peace negotiations. E10 also added that because most of their workers do not work in their home country, there is an entitlement whereby every two years they can return to their home country for two or three weeks of rest and recreation. According to E10, these travel entitlements also constitute business travel.

Such views on the scope of business travel were however, not universal. Thus, two of the fifteen interviewees (E3 and E7) both agreed that the term business travel referred to any travel which is related to business and so explicitly included commuting and freight travel within this definition. Whereas the rest of the interviewees thought business travel is only the travel in the course of work to attend meetings, conferences, training, site visits.

From the above discussion, it can be seen that there are two types of definitions for business travel. One group includes all the senior managers and the majority of commentators, who only see business trips as referring to travel to meetings, conferences, training and so on, and do not include commuting and freight. Meanwhile the second group (made up of two 'commentators') takes a broader perspective and does include commuting and freight.

Taking the majority view, the scope of business travel can be represented as a series of statements. Firstly, business travel refers to passenger travel, not goods travel. Second, business travel must be undertaken by the employees of an organisation and not by outsiders, e.g. visitors or customers. Thirdly, business travel trips are made for the benefit of the organisation rather than of the individual. Fourthly, business travel trips exclude home to work journeys which otherwise comply with the above conditions as these are typically categorised separately as commuting trips.

One final point to note regarding the scope of business travel concerns the degree of overlap between business tourism and leisure travel. Lian and Denstadli (2004) found that 37% of all business travel trips are a combination of business and holiday. Regarding this point, E4, E9, and E12 agreed that business travellers tend to travel with an overriding purpose of achieving a business function and those they therefore usually have little time for leisure. E12 added to this, and suggested that a key characteristic of business travel is that the time spent travelling has to be as productive as possible, meaning that the activity is an essential part of the working week rather than an enjoyable event for the traveller. The way to distinguish business tourism from leisure travel is to look at who pays for the ticket, who determines the destinations, when the trip takes place, the planning horizon and who travels.

The findings from the literature suggest business travel is work-related like visiting clients, participating in a conference or attending meetings and business travel does not include freight and commuting (Swarbrooke and Horner, 2001; Douglas and Lubbe, 2006; Aguilera 2008; Beaverstock *et al.,* 2010). From the above discussion, 13 interviewees out of 15 have defined business travel as work-related travel and did not include commuting and freight in

business travel. Interviews suggest often tourism could be part of business travel. The literature review also supports that business travel and business tourism overlap (Swarbrooke and Horner, 2001; Davidson, 2003). According to Swarbrooke and Horner (2001), the main types of business travel are: individual general business trips; government employees travelling in the service of the state; short–term migration for employment; product launches, exhibitions and trade fairs; training courses; major international congresses and conventions, local, regional and national meetings and conferences and many others. The types of the business travel emerged from the interviews can be mapped as Davidson (2003) provided scope and it has been illustrated in Figure 4.1.
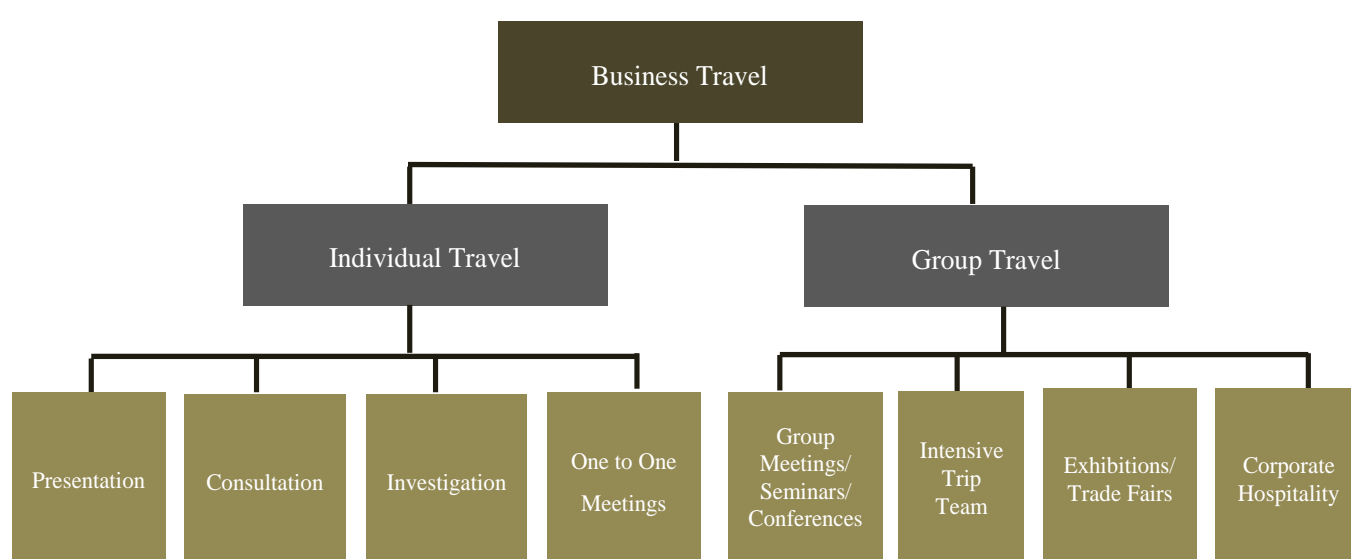
Figure 4.1 Business Travel Types (Adapted from Davidson, 2003)

4.4.2   The Significance of Business Travel to Organisations and the Biggest Obstacles

The evidence suggests that business travel occurs for a whole range of reasons, but that there are also a number of related problems that organisations face as a result. Business travel improves global corporate productivity and if business travel was cut by 25% over two consecutive years then that would cause an average loss of 1% of global employment (Oxford Economics, 2011). Business travel is important for organisations, especially to secure new business; control of the organisations through face-to-face meetings in between employees and management, sharing and development of knowledge and most of all business travel develops the corporate capability of communication ((Beaverstock *et al.,* 2010). However, "*with a virtual meeting, the organisation can reduce the volume of business travel and thus,*

save money and at the same time reduce the company's impact upon the environment" (Arnfalk and Kogg, 2003, p.859), so organisations need to replace face-to-face meetings with virtual meetings where possible.

All of the interviewees suggested that organisations need to undertake business travel because they need to establish trust. Interviewees also suggest organisations need to replace face-to-face meetings by virtual meetings to save CO_2 emissions and the cost of travel and time, but not all of the face-to-face meetings should be replaced. Therefore, according to E6, the importance of business travel is business success. The biggest obstacles are that businesses have not consciously thought about the importance of business travel or created any ability to measure it. Sustainability is also an issue. According to E9, "*the hidden or underestimated sector that influences business travel is the wider sustainability environment peace*". Organisations give more priority to the traveller's comfort than selecting an unsustainable mode by choosing business class air tickets [E9]. Also, the sustainability of the supply sectors themselves has an impact, i.e. how profitable running airports is, how profitable running airlines is, and therefore their impact on capacity and service [E13]. It has been found in the literature that "*businesses with large volumes of business travel have looked to manage it in order to reduce costs and carbon emissions. But these are not the only motivations*" (Roby, 2014, p.20).

 In terms of problems, E6 pointed out that business travel is very expensive, and it is often the second or third biggest cost for businesses. Considering the current economic climate, these costs are likely to increase rather than decline as the global economy continues to improve and business travel is expected to follow a similar route.

E6 also noted that businesses need to recognise the level of their responsibility and the impact of the behaviour of the individuals (who travel) on the reputation of the business. As staff increasingly chooses to work remotely (e.g. work from home), organisations need to develop measures to understand the impact of such work patterns on their travel policies (e.g. business trip costs). This is important because problems associated with business travel need to be fully understood. Failure to do so can mean that business travel is not strategically planned, but simply 'happens'.

Other problems associated with business travel are related to the transport system. E9 mentioned inconsistent security at airports and rail stations when terrorist attacks occur, luggage missing. Interconnectivity too is a problem because of the joined up transport

system, e.g. the airport to train, train to internal metro system require systems that are as simple as possible, but this is not always the case.

To sum up, what travellers really want is a variety of choices framed in terms of cost and carbon, which does not usually [E9] currently exist. Moreover the complex nature of travel policies, travel booking processes means that there is currently no methodology that allows business travellers to determine how and when they travel in the most effective and efficient way [E5, E9, E14] as all travellers need to depend on travel policies and travel booking processes.

4.4.3 Characteristics of Business Travel

Different types of organisations perform business travel according to their business needs. It can be seen that the purpose of business travel within the organisation and its clients, customers and suppliers can change depending on sector and firm culture and between the private and public sectors (Beaverstock *et al.,* 2010). Therefore, this section first looks at motivations for business travel, before considering the influences of organisation type and size.

To explain the motivation of business travel, Miller and Salt (2008, p.34) mentioned, "*The main motive for business travel was for meetings relating to all aspects of business activity*". In terms of duration of business travel, Millar and Salt (2008) presented portfolios of mobility: "*business travel, normally a trip of up to 30 days, provides a highly flexible form of corporate mobility*" (Millar and Salt, 2008, p.34). Therefore, E1 argued that 30 days could be one way of thinking about business travel but anything more than 30 days of travel from an organisation would also be considered as business travel. Technically a migrant for business purposes could live in a country for more than one year. So there is a lot of time between 30 days and one year. E1 also mentioned, there are different forms of travel, "*increasingly in terms of people working together in groups this often involves different sorts of travel. It may not just be to see client A, or may actually involve trips which include whole series of different sorts of mobility, and client A, B, C and D and these may actually be in close proximity to client A*". So for example, someone could go on a business trip to Paris to see a certain client but that business trip could then involve the person travelling from Paris to other cities or other places to see other clients in Belgium, or in Holland for example. That is quite a regular sort of activity [E1].

In terms of difference between the private and public sectors, E12 suspected that the public sector is rather more relaxed about dealing with business travel and in enforcing adequate controls, *"They may have policies, but these are merely written words on paper with no strong enforcement"*. On the other hand, private organisations have stronger control. In this, E8 agreed and stated that the public sector undertakes more business travel than the private sector, but suspected (in the past, though not in the current financial climate) that there was less accountability in the public sector when compared to the private sector. Such practices however, s/he predicted would have reduced by now as more accountability is demanded. A diametrically opposed perspective was offered by E10. In her/his view, *"the public sector was probably less generous and more aware about travel costs than the private sector"*, and that it typically would have a stricter policy as well as a methodology for improving financial performance. In public organisations business travel is often restricted in terms of the number of people undertaking the same trip – again for cost reasons – whilst the private sector tends to be more generous about this [E10].

Next, E2 referred to the size of the organisation. He/her stated that large organisations may adopt procurement types of approaches to manage their purchases, where dedicated staff i.e. Travel Managers, manage the travel processes and that the main aim is to minimise costs. Small organisations on the other hand, tend to adopt an *ad hoc* approach to managing their travel needs when compared with larger organisations. However, E6 gave different thoughts that both large and small organisations adopt similar attitudes to travel purchases, i.e. that they seek discounts when buying business travel, simply because buying teams in most organisations have a similar discipline and now buy business travel in the same way.

4.4.4 Issues Related to Business Travel

Interviewees have mentioned some issues related to business travel. Interestingly, in the view of E2 the two types of issues are related to business travel that *"conflicts often arise between what the traveller wants and what the organisation wants"*. Thus, the thematic analysis of expert interviews has highlighted organisational issues to include: cost, time, policy, decision making, business travel management processes, information and communication technologies (ICT), sustainability and corporate social responsibility (CSR); whilst individual issues included work-life balance, stress, personal security, health, social status, and unnecessary travel. From the literature on business travel there are number of issues that require further

investigation, which can be classified as being organisational or individual (Lyons *et al.,* 2009; Beaverstock *et al.,* 2010; Roby, 2008).

Issues for Organisations

Cost: The cost of business travel (e.g. air/rail fares) varies with time of travel (e.g. peak or off peak) with class of travel, (e.g. first, business or economy); with the length of stay at the destination; with where and when the ticket is purchased and paid for and also other factors like size of the travelling group (Hanlon, 1994). Cost was the most discussed business travel issue in the literature (Swarbrooke and Horner, 2001; Roby, 2008) a position reinforced by all 15 interviewees. Typical of the comments made was that *"business travel costs are often very high and also not very well understood by most businesses"* [E8]. All interviewees suggested that organisations ought to consider how they allocate costs to projects, and that any business travel which they undertake should form part of a defined process that can be engineered more efficiently to reduce the costs of travel to the organisation. E9 mentioned that business travel cost is normally the second or third biggest cost for businesses and that it will likely become more and more expensive in the future and hence become even more of a problem.

Time: Time was a second major issue. Business air travellers mostly use scheduled flights because they tend to travel more frequently than regular tourists and business travellers are prepared to pay higher ticket prices than leisure travellers to travel quickly (Shaw, 2011). All interviewees suggested that business travel is time consuming, and that while rail travel can be used productively [E10], air and road travel result in many lost hours of productivity because of safety and security impedances. However literatures suggests business travellers started to reconsider the use of private aviation as an essential business tool that saves time, improves productivity and conveys corporate prestige (Phillips, 2006; Budd and Graham, (2009).

Planning and Policy: Unplanned business travel with a loose policy is an on-going problem and creates an adverse impact not only on organisations but also on society more broadly (Guizzardi, 2005). E8 noted that the complexity of legislation and legislative changes impact on managing business travel programmes, whilst E4 questioned how current government policies are developed and how they might be made more supportive of organisations in the future. E4 also mentioned, *"there is very little impact from transport policy in business travel*

[in the UK]. That's indicative for the country as a whole. Business is not engaging with the government on transport policy."

Decision making: According to Faulconbridge *et al.,* (2009, p.306) it is very important to know, "*when people travel, why, where they travel from and to how this relates to virtual forms of mobility*". Almost all of the interviewees agreed that currently organisations tend not to identify whether business trips are actually needed or not, and that in fact there is no methodology to help organisations do this [E9, E10]. According to E2 (an academic and senior manager of a centre for research in business travels) mentioned, "*We did a survey in 2008 of business travellers: what was the reason for your last business trip? 20% said to get out of the office. Obviously they did not present that to their employees. So managing the need of travel is important. I believe about 20% of business travel is unnecessary. How has a travel manager identified that 20% that is more difficult.*" However, there are several questions that organisations need to consider while making decisions: when do people have to travel for business trips, and what actually triggers this decision? Is it the company who wants to keep the quality or reputation of their brand, or it is the client who is actually making a demand on the company? [E2]. In response, E11 suggested that it is difficult for managers in organisations to make their decisions about business travel (as to which flight they take or which hotel they stay in). Simply, because it can be a very big part of the life of their employees, (especially those people who travel frequently – i.e. two/three times a week), challenging these decisions can be seen as being an emotive and sensitive subject.

Business travel processes: Strongly related to the decision making process, one issue not referred to in the literature much, but which was raised by all interviewees, concerned the process by which business travel is managed. In effect, in the UK the majority of organisations now manage their business travel through providers known as travel management companies (TMC), and these days TMCs are about delivering best service to business travel for the stakeholders in any organisations (Shaw, 2011). TMCs have many benefits such as offering organisations one single point of contact, user management, consistent approval process, ability to enforce travel policy, one single flow of financial data [E15]. But there are also disadvantages. For instance, Douglas and Lubbe (2006) mentioned, "*TMCs and suppliers often do not coincide with each other. This leads to numerous value conflicts*". Some TMCs often offer special discount for the travellers who select business class [E10]. Such incentives influence the traveller's decision to upgrade which has a cost implication to the organisation. In addition, the 'one invoice practice' that TMCs adopt,

whereby costs from several activities are displayed in one invoice does not always provide sufficient details for the client organisation to monitor exactly how its business travel costs were spent (Elswood, 2011).

ICT: Some research suggest the role of information management systems is reducing the requirement to physically travel for business purposes (Beaverstock *et al.,* 2010; Lu and Peeta, 2009; Zhang *et al.,* 2006). According to E7, not only academics but organisations too are actively trying to consider what the advantages and disadvantages of ICT are over business travel, and particularly at the point where ICT negates the need for employees to travel away on business. However, while the technological development of these systems has been extremely fast, some problems remain. These include technical difficulties, implementation and operation costs, and a lack of expertise [E11, E14, and E15]. Next, if ICT is to reduce business travel then there is a need to coordinate the management of both disciplines, i.e. ICT and Human Resource/Finance (which are related to business travel management), so as to ensure that Travel Managers can take informed decisions as to when ICT may offer a more appropriate solution and so that the expenses relating to both can be properly evaluated – a key area that E11 noted is difficult to conduct in practice. One last point is that for cultural and human reasons (to do with establishing trust) it is good to have face-to-face contact when meeting for the first time, but that subsequent meetings can then often be carried out online [E3, E4, E14].

Sustainability: According to DEFRA (2002), the proportion of road transport in total carbon dioxide emissions has increased from 9% to 21% between 1970-2000. Thus, Kwon (2005) mentioned, road transport is one of the key sectors in which policy change is needed in order to meet the reduction target for CO_2 emissions. According to E8, *"most business travel is done by the least sustainable forms of transport and emissions can be very high. [However], most businesses do not measure these yet"*. All experts that interviewed in this research mentioned the environment is an issue for the business travel management and organisations are reviewing policies according to government law to undertake more eco-friendly and sustainable business travel.

CSR: Finally, there are organisational issues relating to business travel relating to CSR. For example, E9 mentioned that organisations have a duty of care to their employees in taking reasonable steps to maintain their health and wellbeing (perhaps by allowing them to travel business class for longer journeys). Also organisations need to make sure that crisis

management procedures are in place. Otherwise their staff might be affected by circumstances like swine flu outbreaks, tsunami waves, and volcanic activity and so on [E9].

Issues for Travellers

Stress: The physical, psychological and personal effects/stresses of business travellers are important issues (Beaverstock *et al.,* 2010). Failure to gain the purpose to travel after cost investment by the organisation for travel leads the traveller to become stressed (Westma, 2004). In particular, the stress of cross-border travel now in terms of air travel specially passport control, VIP departures, normal departure, and not travelling business class on long journeys have become a very stressful part of the business travel process [E1 and E5].

Health: Several researchers have found that short business trips cause stress and physical and psychological disorders like anxiety, acute reaction to stress and adjustment disorder (Stamation *et al*, 2005; Dimberg *et al.,* 2002; Rogers, 1998). Normally, if individuals travel in dangerous zones then a company would cover traveller costs for life insurance; health insurance, adequate immunisation and so on [E14]. Interestingly, health rather than social status as in the past is often now the prime argument for travellers to travel business class, and a general rule is that if anyone travels for more than nine hours then they are entitled to go business class [E11]. Business class travel provides high quality services by aiding travel flexibility, enhanced comfort and associated amenities in the aircraft and a hassle-free environment between check-in and the actual flight (Derudder *et al.*, 2011; Bowen, 2010) which can give travellers health assurance.

Unnecessary travel: In determining whether business travel is necessary or not, Thelen (2011) suggested that it is important to acknowledge the needs of individuals alongside the key needs of the organisation. According to E10, business travellers often think that business travel is not just about attending a meeting, "*but is a nice way of getting out and seeing a lot of places"*. Consequently, being allowed to travel is seen as being a bonus. E10 added that if business travellers were asked before the trip if the trip was worth making then the answer would be 'no' around 20% of the time. Interestingly, this '20% of business travel is unnecessary' figure was also found in a recent survey mentioned by E2. However, E6 argued that "*most companies stopped non-essential travel a long time ago.*"

Work-life balance: According to E1, for those who are travelling there are issues about work-life balance, particularly for those involved in international business travel because of

longer distances and trips of longer duration, whilst a second element concerned instances where business travel just becomes a normalised everyday part of an employee's working life. Perhaps controversially, E10 suggested that organisations do not look after Traveller's work-life balance. Indeed, s/he claimed that some organisations are using business travel as means to save office costs, and that often there is no compensation for employees from the organisations even when they are required to travel during out of work hours – at night, at weekends, or during holidays.

Specialisation and convergence: No literature appeared about this point however, E10 reported that a 'one size fits all approach' is not always appropriate when considering business travel. Thus, a business traveller may require economy and budget accommodation for one particular type of business trip but business class and five-star for another, so often it is not possible to standardise. Also one type of traveller may find it much simpler to book their own trip and use modern technology to choose and book hotels, while another type of traveller would look to a third party to book everything for them.

Changing business travel management processes: Changing business travel management processes is difficult for travellers, and they are often quite resistant to change because they may feel as though they are required to spend more of their time dealing with it. For example, in the past the traveller may have his/her trip booked through his/her secretary, but now may be required to plan, book and claim back for the trip him/herself, which may put a lot of pressure, and time requirement on the traveller [E2].

Security: In terms of making life easier for business travellers clearly the security arrangements have been the major obstacle in last 5 years [E6]. Business travel can be risky in certain parts of the world and companies need to ensure that staff are adequately protected [E10]. Safety concerns also generate delays through increased security checks at airports [E5]. Some organisations are quite aware about personal security, and advise staff on how to avoid getting robbed, and how to select the best room in a hotel [E7].

Status: Status of the traveller is a factor that influences business travel. According to E10, "*the more senior the traveller, the better travel they get*". The status associated with international travel, building up air miles and using top of the range company cars still influences people and their personal preferences of wanting to be perceived to be of high status in the business environment still stand [E7, E10, E11].

4.4.5 Future of Business Travel

Lassen (2006, 2010) mentioned that besides regular business travel some non-business activities are also involved while undertaking business travel. Thus, "*the need for business travel is not only constructed on the basis of demands, structures, materialities and expectations associated with work, but also on the basis of more individual orientated conditions such as experience, consumption, tourism, health, identities, spare time, family, life style, values, dreams and goals*" (Derudder *et al.*, 2011). The future of business travel is related to the need for business travel, as well as short-term expectations regarding levels of business travel, importance of cost savings and how they may be realised. These concerns can be better managed through improved business travel management practices and related technology development in this area.

E13 mentioned in the future there will be two types of business travel related to sustainability to be considered by organisations, these are: environmental sustainability and financial sustainability. E13 added, if it is possible to develop a system that could reduce the total cost of travel (e.g. in an ideal world a tool kit that can locate, these are the total cost, this is the footprint and if alternative travel take place what would be the cost) would be ideal. According to E13, another thing that would make business travel more financially sustainable in future is to have some sort of metric whereby decision makers could calculate where and when the best place to meet would be from the perspective of the participating organisations, in terms of cost, staff time and carbon footprint.

Finally the environment is a major issue for future business travel (Lyons *et al.*, 2009). E1 suggested there has been an increase in the levels of interest in terms of environmental issues and sustainability; it is interesting that train companies, automobile manufacturers; airlines are investing in new forms of technology like fuel efficient cars for reducing their carbon footprints. Obviously efficient diesel engines in motor cars (for example, a 600 horsepower Hummer) can do 60-80 miles per gallon and that is another way of thinking, primarily to save cost and carbon (financial and environmental sustainability) of business travel and a quicker way of undertaking face-to-face meetings. Even with instantaneous images and sound, video conferences are still not going to overcome the unsociable hours of different time zones [E10]. All interviewees suggested that business travel trips are getting shorter in duration and business organisations are making far more use of ICTs than previously. However, there is

still a requirement to actually engage in mobility (face-to-face meetings) associated with their business activity.

One thing that has not been seen in practice while making decision to reduce travel is some sort of methodology for determining the return on investment of business travel [E9]. According to him/her, "*if any business organisation slashes travel because of the economic downturn, then clearly they don't have an understanding of the returns on investment on travel*", so, correct business travel management processes and correct decision making needed to have started long before the economic downturn.

4.5 SUMMARY

The aim of the scoping study was to explore the scope, significance and characteristics of business travel; and then to examine the related issues and possible futures for the sector.

From the evidence presented, business travel incorporates business trips as referring to travel to meetings, conferences, training and site visits, and does not include commuting and freight.

In terms of its significance, business travel supports the productivity of business organisations and its relationship with sustainable and unsustainable growth.

Business travel was found to exhibit the following characteristics that business travel varies in terms of sector, size and nature of business. As an example, multinational organisations promote substantial amount of business travel as they have lot of clients all over the world. But a retailer, sales persons of any local business will not get lots of business travel because their customers are always in front of them. It is very much who are the customers, and what sorts of relationship with customers they require that is important.

Key business travel issues examined included for the organisations: cost, time, policy, decision making, business travel management processes, Information and Communication Technologies (ICT), sustainability, Corporate Social Responsibility (CSR). For the individual traveller: work-life balance, stress, personal security, health, social status, and unnecessary travel.

Finally, regarding the future the expectations are that if the economy develops and we enter in new business market where increased business travel are needed, we will employ more people around the world and therefore the amount of business travel will increase. There will

always be a need for face-to-face meetings, product deliveries, and marketing factors. Virtual meetings often can be alternatives to face-to-face meetings, and along with these virtual meetings the mode of travel needs to be sustainable to get maximum benefit of costs and business development. More interrogative systems for booking travel and travel alternatives would help determine the objective for the interaction with the stakeholder; what the best means might be to hold the interaction; and whether physical travel is the best approach. The regular travellers need to explain/record the reason for travelling and report it to their line managers to stop unnecessary travel. However, empowering trusting employees is also needed so the hierarchy employers (i.e. policy makers) can take decisions of their own travel. So, the use of technology, policy development and even making decisions about the necessity of business travel for the organisations need to be determined in a systematic way where the organisation can locate how much travel has been undertaken, for what reason and how.

CHAPTER FIVE

SURVEY

5.1 INTRODUCTION

This chapter introduces a national survey of UK organisations. Section 5.2 outlines the survey background whilst the method described in the methodology chapter, Section 5.3, presents the key findings of the survey. The key findings and are displayed based on five sections, namely: 1) background information of the survey respondents; 2) Current process related information; 3) Outcomes of business travel; 4) Factors influencing the level of business travel; 5) Future of business travel and barriers. Section 5.4 gives a brief analysis of the survey findings including the organisation's policy documents analysis to explore the implications to managerial practice and implications for public policy.

5.2 BACKGROUND TO THE SURVEY

5.2.1 Aim and Objectives of the Survey

This survey seeks to acquire a detailed understanding of how organisations manage business travel, so as to fulfil objective two of the thesis, which is examine the effect of organisation process on business travel. In the survey question it has been asked if the organisations if they have a defined process for managing business travel in their organisation (appendix 2, question 2). Some of these survey organisations have strongly agreed they formulated official corporate business travel policies, but some organisations, especially the smaller organisations, did not have the specific corporate business travel policies written for the organisation. The purpose for the survey was to identify the gaps and flaws among the existing process. Specifically it seeks to look into the detail processes used, the amount and type of business travel undertaken, the factors that influence this and how business travel is likely to evolve in the future. It also reviews the business travel policy documents of the survey organisations to see the current policy applied in organisations. The survey findings are intended to help identify case study organisations for in-depth research on business travel processes in UK and with make recommendations for the effective use of business travel processes within organisations.

5.2.2 Method and Structure of the Survey Questionnaire

Surveys are a means of collecting information about attitudes, beliefs and behaviours which describe a particular population (Sapsford, 2007). In this case, the 'population' comprised UK organisations from different business sectors.

As a first step, business travel managers of each member of the FTSE (2010) top 100 organisations were contacted by email or telephone. The name of each organisation was first taken from the FTSE list. The head office phone number and the travel managers within each organisation were then identified by online search and then contacted by email and/or by phone. Respondents were encouraged to complete an online survey which was selected as a delivery route because online surveys are much easier to circulate. Emails were also sent to the interviewees with a survey link; a Word version of the survey was also sent with the email. All together this initial approach led to ten responses being received. Due to the low (ten) number of responses, another 100 UK organisations (which are not FTSE organisations) were then selected through a 'snowballing' sampling approach (see Methodology chapter for details) and from this process a further 35 responses were generated, all of which are UK-based organisations. Altogether 41 organisations responded to the survey, and these were coded as C1-C41 where C stands for 'company' and the following digits indicate the unique ID. Among C1-C41first 10 (C1-C10) are FTSE organisations, and the rest are other organisations.

Tables 5.1 and 5.2 show the sampling distributions by sectors, number of employees and annual turnover. Among the 41 organisations, 9 were small or small (>50) 7 were medium (>250 employees) and another 25 organisations were large (>250 employees). It can be seen that the average company size was greater than 10,000 employees with a mean average turnover of £GBP 4 billion ($USD 6 billion) and median £GBP 0.34 billion ($USD 0.54 billion).

The survey was conducted late in 2011 and the person involved in managing business travel within the organisation was requested to complete the online survey form. Amongst all of the survey respondents, 13 were directors, 10 were senior managers and 18 were middle management. Responses were obtained from organisations representing nine out of the 11 different economic sectors as categorised under UK government reporting guidelines (ONS, 2010).

Table 5.1 Sampling distributions by sectors and number of employees.

Sectors (Total Organisations 41)	Number of Employees			
	0-49 ☾	50-249 ●	250-999 ●	>1000 ●
Finance (6)	C22	C38		C3, C4, C7, C23
Wholesale, Retail, Hotels, Restaurants (4)			C8	C5, C9, C28
Education, Health and Social Work (7)		C14, C40	C13, C21	C10, C29,C41
Manufacturing (6)	C30, C37	C12		C1, C6,C39
Transport, Storage and Communication(10)	C16,C17, C19, C32, C34	C15, C33	C36	C31,C35
Construction (3)		C26	C18	C27
Other service (1)	C20			
Public Ad, National Defense, Social Work (3)				C11,C24, C25
Electric, Gas and Water Supply(1)				C2
Total	9	7	5	20

Table 5.2 Sampling distributions by sectors and number of employees and turnover.

Sectors (Total Organisations 41)	Turnover					
	>£100k-<1m	1m-<10m	10m-<100m	100m-<1b	1b-<10b	Details Not Known
Finance (6)	C22☾		C3●, C38●	C4●, C7●,	C23 ●	
Wholesale, Retail, Hotels, Restaurants (4)	C5●		C8●	C9●, C28●		
Education, Health and Social Work (7)		C21●	C14 ●, C40 ☾	C10●, C29●,C41●		C13●
Manufacturing (6)		C37☾	C30 ☾	C39●	C1●,C6●,	C12 ☾
Transport, Storage and Communication(10)		C16 ☾, C17☾, C19 ☾, C32☾, C34 ☾	C15●, C33●,	C36●	C31●, C35 ●	
Construction (3)		C26●			C27 ●	C18●
Other service (1)			C20 ☾			
Public Ad, National Defense, Social Work (3)				C24●, C25●		C11●
Electric, Gas and Water Supply(1)					C2●	
Total	2	8	9	11	7	4

In gathering the required data, a revealed preference (RP) questionnaire survey comprising both closed and open-ended questions was designed and applied. Closed questions were used to make cross-comparisons, whilst open-ended questions were employed to gather more detailed views (Flick, 2006) (see chapter three for more details on this). Specifically, questions were asked that related to: a) the business travel management processes used; b) the amount and type of business travel undertaken; c) the factors that influence this; and d) how business travel is likely to evolve in the future.

In light of the above discussion, the survey dataset has been presented alongside pertinent literature findings and is analysed in the following section.

5.3 KEY FINDINGS AND ANALYSIS OF THE SURVEY

5.3.1 Business Travel Management Process

In examining the process of managing business travel in organisations, a clear majority of 34 organisations (18 Strongly Agree, 16 Agree) saw managing business travel as being an important issue whilst four disagreed (2 Strongly Disagree, 2 Disagree) and 3 did not respond. It was also found that the only identifiable relationship between type of business travel management process and organisation type or size, was that larger organisations by number of employees tended to have more formalised management processes than smaller ones. Gustafson (2012) and Zhang *et al.* (2009) reported that little attention has been paid to effective management techniques and processes relating to business travel, but that the main point raised was that while existing processes (where applied) were often recognised as not always performing well in meeting stated objectives, they were left alone because they were perceived as being difficult to change.

Looking next at business travel objectives, improving efficiency (i.e. in terms of time, gathering accurate information, using common sense, facilitating event activity/client reporting) and cost reduction were seen as being important as both with 20/41 responses across all sectors. Meanwhile 11 organisations mentioned that business travel should help meet business development goals (e.g. increased and enhanced business relationships, higher sales) and should not limit growth potential, whilst 6 organisations mentioned security as being important in terms of prompt and safe execution of travel for staff. Next, 5 organisations responded that public organisations (especially in the education, health and social work sectors) were more aware of policy-driven inputs (i.e. compliance to policy,

annual plan, sound planning methodology) but rather less concerned about the need to improve the efficiency of the business travel process. Lastly, the finance and educational, health and social work sectors were also concerned about the legal requirements of current practices. Perhaps surprisingly, only 5 organisations mentioned cutting carbon as being an important objective, 2 of which [C10,C11] had set a specific goal which was to reduce their annual business travel trips by 5-10%. Noticeably the finance, manufacturing, transport, storage and communication and other services sectors did not mention this issue at all.

In looking to the future, the relative importance of objectives changes markedly. Thus, improving efficiency is clearly the most important objective of business travel for the future (26/41), followed by cost reduction (21/41), then security (14/41), then business development objectives which by contrast fell from 11 to 6 in the future. Finally, reducing the amount of business travel becomes rather more of a goal (up from 2 organisations currently to 6), while both the meeting legal requirements and reducing carbon objectives both dropped slightly from being mentioned by 5 respondents each to 4. To demonstrate the objectives of business travel, Swarbrooke and Horner (2001), mentioned to undertake cost effective travel, there is a need to determine before any travel is performed if the travel is necessary by developing strong policies. Govindarajan and Gupta (2001) mentioned the main objectives of business travel are to close deals, solve problems, negotiate contracts and develop mutual trust to improve travellers' efficiency and to develop business goals.

The survey also examined current organisational practices, and this revealed that business travel is most often managed within Human Resources (14/41organisations) departments, followed by sales and marketing (8/41), finance (7/41), and procurement/purchasing (7/41). interestingly 5 small organisations (5/41) did not mention in which departments their business travel is managed. This perhaps suggests that business travel is managed in a less structured or more ad hoc manner in such organisations. Meanwhile managing director offices (2/4), other 'individual departments': environment management/climate change (1/41), and estates/facilities (1/41) were also involved with managing business travel at the strategic level. Meanwhile one organisation completely outsourced the management of the business travel function. Relating to this, survey respondent C14 noted that strategic level managers needed to be supportive to travellers and that a willingness to change across departments was important. For example, s/he pointed out that it is often the case that IT support is required when managing business travel, and so there may be a case for explicitly allocating some responsibility for some specific business travel tasks to an IT Department employee.

Similarly, previous studies have found that business travel process management incorporates a large number of 'stakeholders' within each organisation, including travellers, budget holders, human resources (HR), information technology (IT), and finance. This means that satisfying these various stakeholders' needs within a single process will not always be easy (Davidson and Cope, 2003). In addition, Holma (2012) noted that the travel management process should ideally occur at two levels within an organisation: a) the strategic level (for policy making, management reporting and analysis) and b) the operational level (for supply management, daily interaction with the traveller, payment and travel settlement procedure).

The survey revealed that the most used type of service providers are corporate card providers (28/41 organisations) and travel management companies or TMCs (22/41 organisations), whilst the other currently used service providers are rail booking services (19/41); and hotel booking (17/41). Meanwhile, event management services and group travel providers apparently offer the most potential for the future. Surprisingly only one organisation fully booked its business travel via TMCs (Figure 5.1).
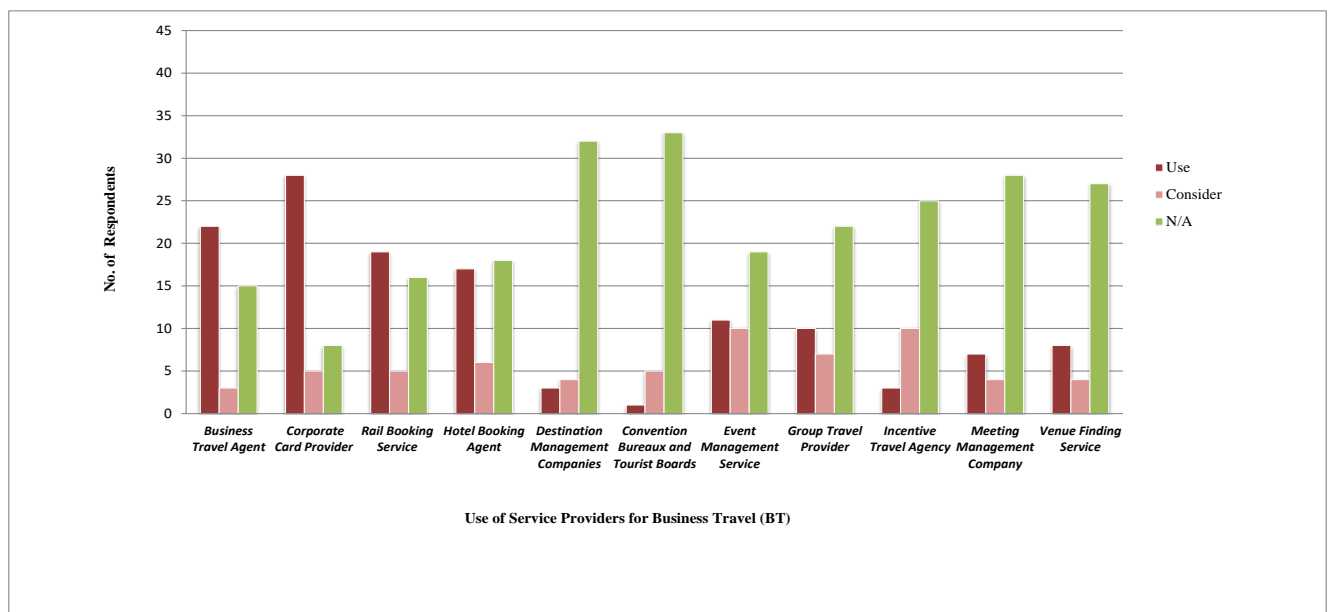
Figure 5.1 Use of Service Providers for Business Travel

This may be because suppliers have switched to internet and online booking tools and become less dependent on TMCs to fully manage business travel for the organisation (Gustafson, 2012; Holma, 2012). Thus, Heung (2003) suggested that internet users were increasingly making bookings and purchasing products individually although the paper added that at that time (in the early 2000s) there was still a general lack of information on how to

use the Internet to search for travel information, book travel and purchase travel products. Meanwhile Swarbrooke and Horner (2001) listed a range of different types of service provider or intermediaries/specialist agencies, such as TMCs; Destination Management Companies; Specialist ground handlers who handle practical arrangements in destinations; Event Management Service Providers; Incentive Travel agencies; and Venue-Finding Services. However, no indication about their take up by organisations was provided by Swarbrooke and Horner (2001). In recent years the internet has revolutionized business operations as a powerful operational and marketing tool (Wang *et al*, 2015). More and more travellers use the Internet for information search and travel arrangement (Litvin *et al*., 2008; IPSOS, 2012; Liu and Zhang, 2014). The more experienced a company the richer the websites would be (Wang *et al*, 2015).

There were various technologies used by organisations to help manage the business travel management process. From the survey it was identified that the most used technologies related to Mobile Telecommunications (35); Self Booking Tools (28); and Video Conferencing or Telepresence (25). Next were payment through a Corporate Card Provider (22/41 organisations); Expenses Management System (20), RFP (Request for Proposal) Tools and Reporting Tools (18), and Business Travel Agency Software (16). In addition 16 organisations used Carbon Calculating and Offsetting tools, while several more were considering using them in future, even though, as noted earlier, reducing carbon was seen as being an objective of business travel by only five organisations. In the literature, it was noted that 'Request for Proposal' and 'Reporting' tools allowed organisations to quantify and visualise business travel processes and thus helped them take more informed decisions (Wheaton, 2008). Other technologies mentioned were carbon calculating and offsetting tools to measure the carbon emissions, payment tools for payment solutions of business turnover level and expense management tools (ACOA, 2008) which seek to reduce costs and increase efficiency. Meanwhile the potential for achieving environmental and financial improvements by the business organisations was said to be dependent on increased substitution of in person meetings by virtual communications (Lian and Danstadli, 2004; Swarbrooke and Horner, 2001), and virtual meetings have been found to improve internal communications by allowing frequent meetings between company employees (Amfalk and Kogg, 2003).

5.3.2 Business Travel Process Management Outcomes

Table 5.2 presents details of business travel spend by organisations in 2010, classified by different sectors, different organisation sizes in terms of employee numbers and the approach of using TMCs and non-TMCs. The results revealed that including the large organisations the SMEs (see methodology for the definition of large, medium and small organisations) also use TMCs to manage business travel. According to C12 however (a respondent from a small organisation), *"smaller companies tend to watch their travel more costs closely and each trip is normally fully justified"*.

While not all of the survey organisations shared their cost data, from the data of 23 organisations, business travel expenditure ranged up to £GBP 140 million, and the mean was just over £GBP 12 million). Interestingly the highest rate of business travel as a proportion of turnover per year (10%) was undertaken in the finance sector, whilst the lowest rate was 0.003% in the manufacturing sector. In terms of spending on business travel per employee, this varies significantly by sector. For example, in the finance sector, spending ranged from £1,625 to £10,000 and in the transport, storage and communication sector from £500 to £4,090 (see Table 5.3).

In terms of modal share with respect to business travel, for the year 2010 (the year prior to the survey, see Appendix 2, question 11) the results showed that 40% of business travel trips were undertaken by air in 2010, 34% by private car, 15% by car hire and pool car; 8% by rail and bus; 1% by bus; 1% by cycle and 1% on foot (sample size 26 organisations out of 41). Commenting on why relatively few organisations were able to answer this question, C11 from the Manufacturing sector noted, *"Our current expenses and monitoring systems do not enable us to take an organisational overview of who travels, by what mode and for what reason. This in itself is a barrier to understanding business travel for the whole organisation and as such we currently only monitor and analyse business mileage carried out by employees in their own cars and claimed for through our expenses claim system"*.

Table 5.3 Business Travel Spend 2010 by Sector, Employee Size, Process Type and Proportion of Turnover (Key: Employee No: 0-49 ☽, 50-249 ◑, 250-999 ◕, >1000 ● Using TMCs …, Business Travel Budget, Business Travel Budget as% of Turnover, Business Travel Budget per Employee).

Sectors (Total Org. 41)	Business Travel Spend in 2010 (£m)						
	Details not Known	0-<£10k	£10k-<£100k	£100k-<1m	1m-<10m	10m-<100m	100m-<1b
Finance (6)	● C3		●C7 (£25k, 8.3%, £6250)	☽ C22 (£100k, 10%, £10000), ◑ C38 (£350k, 1.6%, £1625)	☽ C23 (£1m, N/A)		● C4 (£140m, 0.3%, £965)
Wholesale, Retail, Hotels, Restaurants (4)	● C28,◑ C5,◑ C8 ,◕ C9						
Education, Health and Social Work (7)	☽ C13,◕ C21,● C10		◕ C14 (£30k, 0.03%, £60),	◕ C40 (£180k, 0.9%, £720), ● C41 (£400k, 0.2%, £121)	● C29 (£1.5m, 0.7%, £428),		
Manufacturing (6)	◑ C12, ☽ C1,		☽ C30 (£15k, N/A,£750), ☽C37 (£20k, 0.7%,£ 2000), ● C39 (£10k, 0.003%, £3)			● C6 (£100m, 1.3%, £2564)	
Transport, Storage and Communication (10)	● C31,☽ C16 , ● C35	☽ C17 (£4k, 0.2%, £500)	☽C19 (£20k, 0.3%, £1000), ☽ C32 (£30k, 0.5%, £3000), ☽ C34 (£45k, 1.5%, £4090), ◑ C15 (£25k, 0.07%, £416), ◑ C33 (£10k, 0.03%, £94)		◕ C36 (£1m, 0.3%, £1086)		
Construction (3)	☽C18, ● C27		☽ C26 (£48k, 0.5%, £960)				
Other service (1)	☽ C20						
Public Ad, National Defence, Social Work (3)	●C11, ● C25, ☽ C24						
Electric, Gas and Water Supply (1)						● C2 (£13.3m, 0.06%, £429)	
Total (41)	19	1	11	4	3	2	1

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In looking at business travel outcomes from the literature, from an organisational perspective the cost of business trips is recognised as being significant. Global Expense (2008) found that the average employee in the financial sector in the UK claims an average of £50 per year, compared with £28 for wholesale and retail and £24 for the public sector (Global Expense, 2008). Meanwhile the same study also suggested that medium sized organisations (50 to 250 employees) generally spend less on average than their counterparts in large and small businesses – a result which partly supports the survey findings (where larger organisations spent more per employee). This seems to be because employees in large organisations are much more split between those who travel a lot on business (thus one-quarter received more than £1,500 per annum), and those who do not travel much at all. Gustafson (2013, p.28) therefore mentioned besides large organisations it is important to study in the future, *"to what extent, in what ways and by whom business travel is managed in small and medium-sized companies without designated travel managers"*. According to Gustafson (2012), whilst business meetings are very important they are also an expensive, time consuming activity from both the organisational and employee perspectives, and have significant environmental effects. Looking specifically at the environmental objectives, Hoyer and Naess (2001) stated that business travel needs to be examined in terms of its environmental impact, not least because a significant proportion of business travel is by air (Mason, 2000). More generally, Kwon (2005, pp184) mentioned, *"if the growth of average distance per car trip is restrained, possibly due to sustainable planning policy"* then by 2030 a reduction in CO2 emissions of 20% will be possible. On the other hand though, the main barriers for employees to not use public transport are the longer time taken to reach the destination, and destinations and poor service reliability (Sim *et al.,* 2001).

5.3.3 Factors Influencing the Level of Business Travel

From the literature review, four factors influence the level of business travel in survey organisations: 1) trip factors, 2) organisational and employee factors, 3) political and economic factors and 4) social, environmental and technological factors. These factors are discussed in detail below. Figures 5.2, 5.3, 5.4 and 5.5 show all four factors and their classification levels.
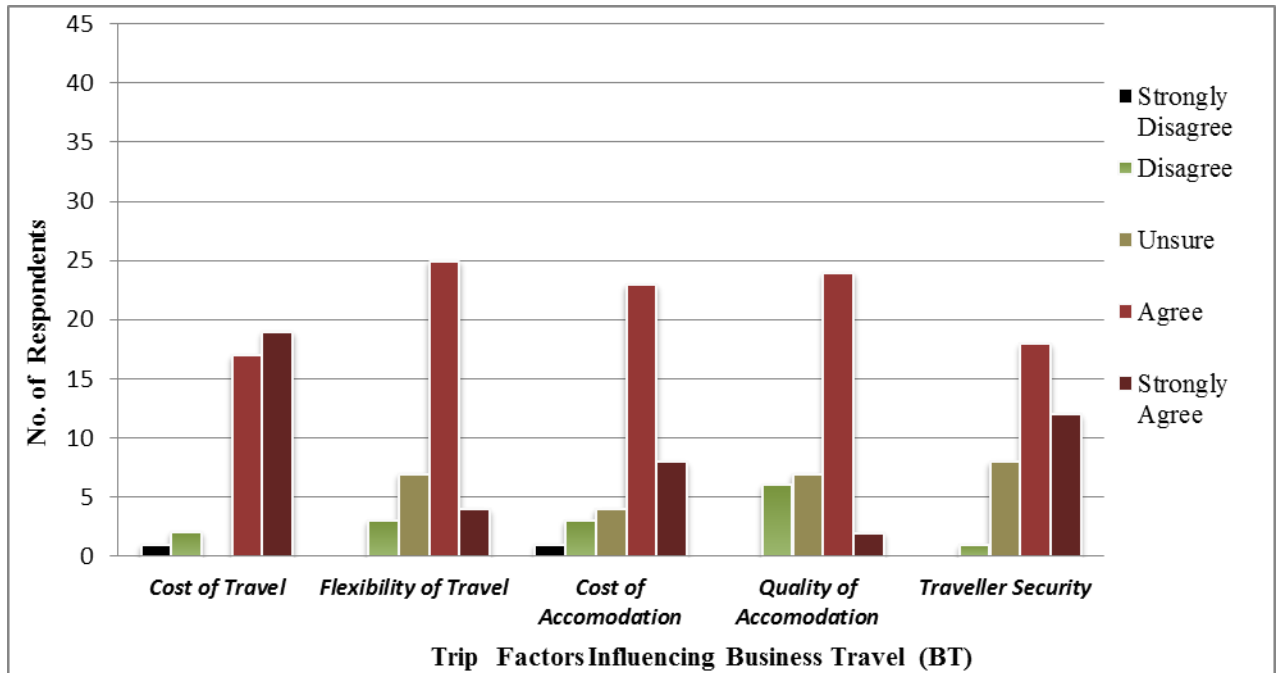
Figure 5.2 Trip Factors Influencing Business Travel (BT).
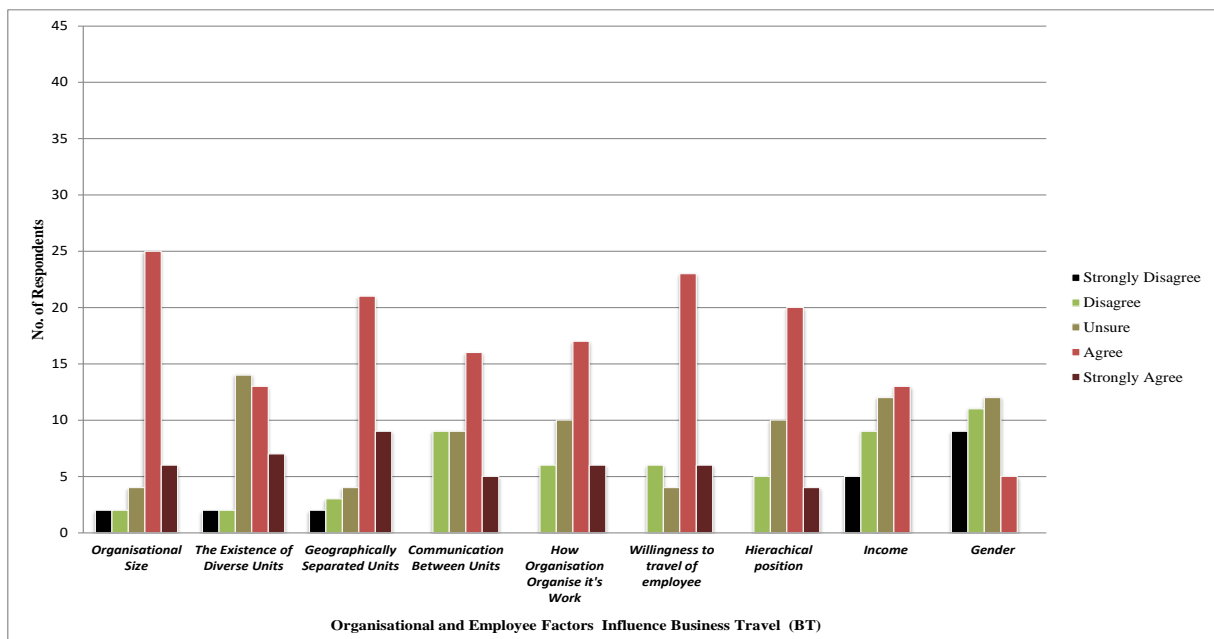
Figure 5.3 Organisational and Employee Factors Influencing Business Travel
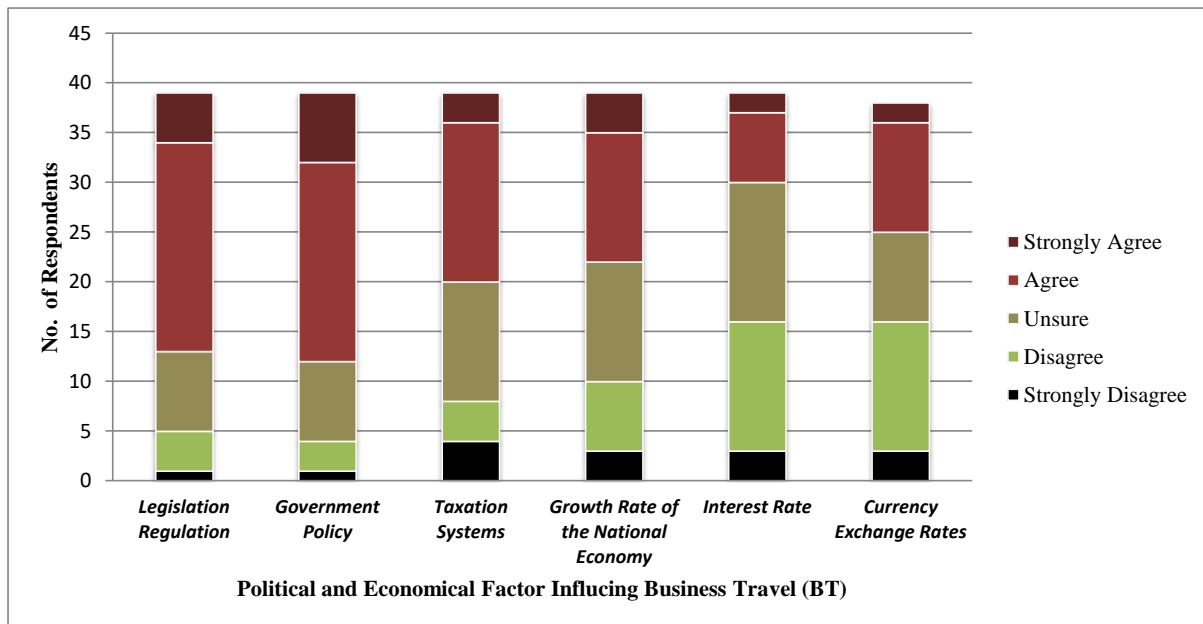
Figure 5.4 Political and Economic Factors Influencing Business Travel
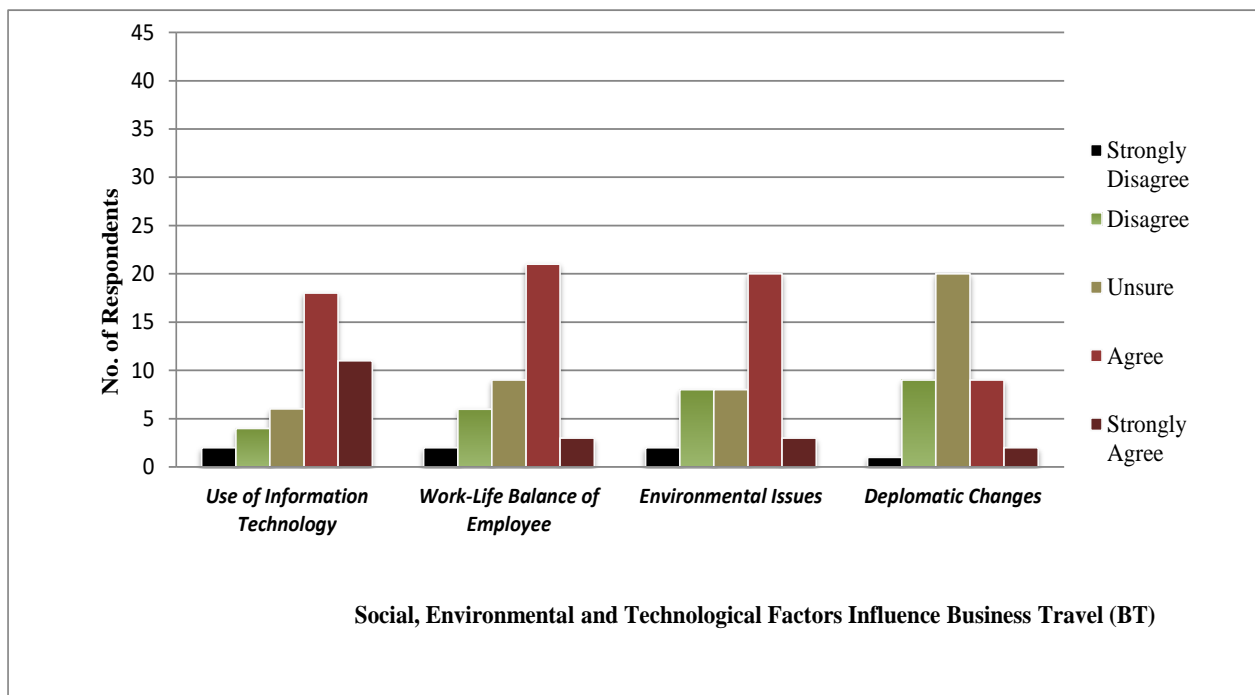
Figure 5.5 Social, Environmental and Technological Factors Influencing Business Travel.

From this, it can be seen that trip factors were considered to be the most important influence, with the cost of travel being the major factor influencing the decision as to whether to take a business trip or not, while other key influences were use of information technology, flexibility of travel, and traveller security. The second most important category was found to

be organisational and employee factors. Thus, organisational size was considered to be a major factor by 32 respondents (6 Strongly Agree and 25 Agree). It was noticeable that gender was seen as being less of an influence. If a traveller needs to travel for business in the survey organisations they must undertake business travel regardless of whether they are male or female. Next, political and economic factors were the third most important category. Government policy (7 Strongly Agree, 21 Agree), legislation and regulation (4 Strongly Agree, 21 agree) and taxation systems (3 Strongly Agree, 13 Agree) all government 'controlled' appeared to exert more influence than broader economic factors such as growth rates, currency exchange rates or interest rates. Fourth, of the social, environmental and technological factors, 30/41 Strongly Agreed/Agreed that the use of ICT was important, compared with 25 who cited work-life balance, 24 environmental issues and only 11 who noted demographic issues. Curiously, whilst the Companies Act 2006 (Strategic Report and Directors' Reports) Regulations 2013 requires quoted companies to report on greenhouse gas (GHG) emissions for which they are responsible (DEFRA, 2013), the environment was found to be relatively unimportant. Survey respondent C7 mentioned in this regard, "*The economic climate has meant that environmental issues are not top of the agenda. This will change as the economy recovers*".

Interestingly Van Trommet *et al.* (1998) mentioned that organisations cut travel costs by reducing the cost per trip. Aguilera (2008, p.1112), reported that, "*a company's sector or size is not the most appropriate parameter by which a need for business travel should be judged*", rather organisational aspects, hierarchical position, income, and gender have much more influence. The paper added that, contrary to the survey results, gender is an important factor that has influences on business travel – simply, men travel more than women because of security purposes. Meanwhile Swarbrooke and Horner (2001) neglected to mention Government influences as a being a significant contextual factor, but did report that economic growth (to which interest rates, currency exchange rates, and industry ownership are related) was a major influence on business travel.

Overall it can be determined that cost of travel, IT, government policy, legislation regulation, taxation systems, organisation size, and work-life balance (Table 5.4) are the major factors which influence business travel and so clearly need to be considered if business travel is to be managed properly by organisations and government.

Table 5.4 Major Factors Influencing Business Travel

	Cost of Travel	Organisation Size	Government Policy	Legislation Regulation	Work-Life Balance	Taxation System
Number of organisations citing factor as influence	36	29	26	25	24	18

5.4 POLICY DOCUMENT ANALYSIS

5.4.1 Context of the Policy Document Analysis

After undertaking the survey, the policy documents of the organisations were thematically analysed for enhanced insight about the current business travel process among the survey organisations. The purpose of these business travel policies is to provide clear and definitive procedures for claiming and/or incurring expenses on behalf of the organisation in the course of the traveller's employment, and in the UK context they are required to ensure that the organisations comply with statutory legislation and HM Revenue and Customs (HMRC) regulations. Five organisation's business travel policy documents were available online while the remaining 36 organisations were individually contacted for their business travel policy documentation. Of these 36, it was found that16 organisations have written travel policies; 11 organisations have no written business travel policies; three organisations mentioned that they cannot share their documents; another six did not respond after being contacted on several occasions. Further details of the policy documents obtained are provided in Appendix Three.

After reviewing the policy documents it has found that policy documents generally specify what type of travel, meeting, entertainment, and other expenses will be paid for or reimbursed by the organisation. The policy documents always mention the scope of the policy, general principals, responsibilities, documentation, travel arrangements, business travel expenses business travel negative impact reduction on cost.

Table 5.5 gives details on sector specific status of business travel policy documents of the survey organisations. Among the 21 organisations that have written business travel policies, 17 were large organisations, three were medium organisations and only one was a small organisation. Interestingly, of the 11 organisations that did not have written business travel policies, nine were small and medium-sized, whilst the other two were large organisations – one in wholesale and retail, and the other in construction. Overall, small to medium organisations that do not have business travel policies were from the transport, finance and construction and the 'other' sectors.

Table: 5.5 Sector Specific Statuses of Business Travel Policy Documents of Survey Organisations.

Sectors	Available Online	Has Written Policy	No Written Policy	Did Not Respond
Finance (6)		**C4,C23,** *C38*	c22	**C3,C7**
Wholesale, Retail, Hotels, Restaurants (4)	**C28**	**C28**	**C8**	**C5,C9**
Education, Health and Social Work (7)	**C10,C13,***C14*	**C10,C13,***C14,* **C21,C29,***C40,***C41**		
Manufacturing (6)		**C1,C6,C39**		*C12,*c30,c37
Transport, storage and Communication (10)		c16, **C27 C35, C36, ,C31**	*C15,*c17,c19,c32, *C33,*c34	
Construction (3)			*C26,***C18**	
Other Service (1)			c20	
Public Ad, National Defence, Social Work (3)	**C24**	**C24, C25**		**C11**
Electric, Gas and Water Supply (1)				**C2**
Total	5	**21**	**11**	**9**

(NOTE: large organisations are represented using bold '**C**' labels, medium-sized organisations by italic '*C*' labels and small organisations by small 'c' labels).

Out of the 41 survey organisations 16 organisations are small and medium, employing less than 250 staff. Among these 16 organisations, seven organisations are from the transport, storage and communication sector where the majority (six out of the seven organisations) do not have written business travel policies. Out of 41 survey organisations it found 11 organisations do not have written business travel policies (apart from organisations who did not respond and decline to provide any information) and among these 11 organisations a total of 9 small and medium organisations do not have written business travel policies.

5.4.2 Policy Documents Objectives

The main objectives of the travel policies are cost saving, sustainable environment, travellers' security and wellbeing. The following topics are discussed below.

Cost reduction

Organisations are required to meet taxation and legal requirements associated with business travel and other expenses. One significant objective of the business travel policy in these organisations is to reimburse claimants promptly for expenses properly incurred on the organisation's business. The policy in these organisations is designed to ensure that no taxable benefit is paid which would lead to a tax liability for either the organisation or the member of staff. The travel policies mentioned it is every employee's responsibility to ensure that expenses incurred and charged to the organisation are done so in the interest of the organisation and costs are kept to a minimum. All claims are to be completed correctly in compliance with organisation procedure and all receipts attached to the relevant claim. Organisations also provide clear guidelines for types of expenditure that are and are not reimbursable; inform employees about other external officers engaged in the organisation business of their responsibilities relative to the completion and submission of expense claim forms; organisations achieve complaints with statutory UK tax law and HMRC policy guidance and reduce any risk of incurring tax penalties for underpayment of tax liabilities. Apart from these some organisations mentioned other cost-related objectives in their policy documents:

- Maximise the organisation's ability to negotiate discounted rates with contracted suppliers and reduce travel and related expenses, including the utilisation of the organisation's appointed TMCs, the corporate card programme, the suppliers i.e.: airlines, hotel, car rental and rail companies (C1, C2);

- Travel and related accommodation and subsistence costs are an important element of the group's cost base. The business travel policy and procedure supports managing expenditure carefully by having appropriate control over travel expenses and by ensuring that business trips are only incurred where there is an essential business need (C4);

- Reduce car journeys, especially single occupancy journeys, promote staff car sharing to save cost of travel (C13, C21); and

- The existing policy gives the travellers guidance on what to claim through expenses and will reduce any ambiguity or confusion that the traveller may experience. There will be instances where this travel and expenses policy document does not specifically address a particular type of expenditure and in this instance guidance should be obtained from the expenses team (C27).

Improving efficiency

Improving efficiency is popular objective after cost reduction. Total 14 out of 21 organisations mentioned improving efficiency in their document and the proportion of this objective is highest education, health and social sector.

Traveller security and wellbeing

In total, 13 organisations mentioned providing business travellers with a reasonable level of service, comfort, personal health, safety and security at optimum cost. They ensure all employees have a clear and consistent understanding of policies and standards for business travel. They ensure all reasonable expenses are covered and no employee is left 'out of pocket' to support their daily work.

CSR

Total ten organisations out of 21 mentioned about CSR in their policy documents. It is noticeable in data set that the education and health sector gives priority on CSR .

Carbon reduction

Ten large organisation's (C4, C10, C13, C21, C24, C25, C27, C28, C29, C38) policy documents support reducing their carbon footprint. These organisations' travel policies mention the organisations must use resources efficiently to minimise the impact on the environment while undertaking business travel. The policy emphasizes the rules of business

travel where the associated environmental, social and economic impact is minimized, without negatively affecting the ability of the organisation to deliver its mandate. According to the policy these organisations should monitor their employees' use of transport for work purposes and consider whether any changes should be made to improve the environmental impact of work-related travel. Apart from these, some organisations mentioned about other environment-related objectives in their policy documents:

- The organisation has 'no travel week', thus the organisation aspires to undertake travel alternatives by virtual meetings. This helps the environment by protecting carbon emissions (C4);

- The organisation monitors and progressively reduces the volume of scope 1, 2 and 3 – 5, namely air and business travel by road, waste and water emissions defined as the organisation's carbon footprint (C13);

- The organisation increases its percentage of staff cycling; decreases its percentage staff car use (C21); the organisation operates a pool bike scheme, managers are encouraged to consider the suitability of this wherever possible (C25);

- The organisation has made a commitment to minimise the environmental impact of its operation, preventing pollution and striving to continually improve its environmental performance whilst at the same time controlling costs (C27); and

- The organisation reduces overall company travel, minimises the transport element of the organisation's carbon footprint, and raises awareness and use of sustainable travel (C38).

Table 5.6 provides sector specific survey organisation's business travel policy objectives.

Sector	Business Travel Policy Objectives				
	Cost saving	Improving efficiency	Travellers security	CSR	Carbon reduction
Finance	**C4,C23,** *C38*	*C38*	*C38*	**C4,** *C38*	**C4,** *C38*
Wholesale, Retail, Hotels, Restaurants	**C28**	**C28,**			**C28**
Education, Health and Social Work	*C14,***C10,C13, C21, C29,** *C40,* **C41**	**C13,** *C14,* **C21,** *C40,* **C41**	**C13,** *C14,* **C29,** *C40*	**C13,** *C40,* **C41**	**C10, C13,C21, C29, C41**
Manufacturing	**C1, , C6, C39**	**C6, C39**	**C1, C6, C39**	**C1**	**C1,C6**
Transport, storage and Communication	c16,**C27,C31, C35, C36**	**C27, C31, C36**	c16, **C31, C36**	**C27 C31**	**C27**
Public Ad, National Defence, Social Work	**C24,C25**	**C24,C25**	**C24,C25**	**C24, C25**	**C24, C25**
Total	**21**	**14**	**13**	**10**	**13**

To achieve the business travel policy objectives organisations uses some measures to manage and undertake business travel. The most used measures are: corporate card provider, use of video conferencing, using TMC, meeting management service. Table 5.6 gives detail of the suggested measures.

It has been found in the survey that a total of 14 organisations out of 21 use corporate card provider. The data found on policies documents, total nine (C1, C6, C39, C10, C13, C29. C40, C24, C27) large and two medium (c14, C16) organisation uses TMCs (apart from organisations who do not have written business travel policies and five organisations who did not respond to the query, see Table 5.5). After aligning with the survey result it has found C18, an organisation from the construction sector, uses TMCs but does not own a written business travel policy.

Total 12 organisations mention in the business travel policy document about the alternatives to travel. These policy documents suggest that the organisation needs to take time to consider if the travel can be replaced by virtual meetings. Even though some large organisations mentioned about sustainable travel, they did not mention undertaking virtual travel in policy documents

Table: 5.7 Measures Suggested in Policy Documents										
Measures Suggested in the Policy Documents										
Sectors	Video conferencing facilities	Carbon calculating and offsetting	prioritising public transport options	Use of TMCs	Online Booking Tool	Corporate card provider	Hotel booking Agent	Rail booking service	Meeting management service	REF Reporting Tools
Finance	**C4, C23,**	**C4, C23**	**C4,** *C38*		**C4, C23**	**C23,** *C38*			**C4, C23**	**C4, C23**
Wholesale, Retail, Hotels, Restaurants		**C28**				**C28**		**C28**	**C28**	**C28**
Education, Health and Social Work	**C10, C13,** *C14,* **C41**	**C10, C29**		**C10, C13,** *C14,* **C29**		**C10, C13,** *C14,* **C29,** *C40,* **C41**	**C10, C13, C29**	**C10,** *C14,* **C29, C41**	**C21**	
Manufacturing	**C1, C6**	**C6, C39**	**C6**	**C1, C6, C39**	**C6, C39**	**C1, C39**	**C1**	**C1, C6, C39**	**C1, C6**	**C1, C6**
Transport, storage and Communication	**C27, C36**	**C31, C35, C36**		c16, **C27, C36**	**C27, C31**	c16, **C35, C36**	**C27, C35, C36**	**C31**	**C27, C31, C35, C36**	**C27, C31, C35, C36**
Public Ad, National Defence, Social Work	**C24, C25**	**C24**		**C24**	**C25**				**C24**	**C24**
Total	**12**	**11**	**3**	**11**	**7**	**14**	**7**	**8**	**11**	**10**

5.4.3 Policy Process Issues

Among large organisations, eight organisations (C1, C6, C23, C24, C25, C29, C31, C39) mentioned that line managers should be made aware of and approve the individual's need to travel, prior to booking. In these organisations, prior formal approval for UK domestic travel was not required; however, if any travel booking is required for non-domestic travel then a travel request must be raised. All travel claims must be approved by an authorised manager and supported by a VAT receipt or, exceptionally, other evidence of payment. It is noticeable that out of these eight organisations, five (C1, C6, C24, C29, C39) uses TMCs whilst the other three (C23, C25, C31) do not.

The one document received from transport, storage and communication document (C16) showed that the policy emphasises on cost of travel and all reasonable expenses incurred as a result of the attendance at the organisation meetings will be reimbursed by the secretariat. Similarly another large transport organisation, C36, also mentioned reimbursement and the policy patterns seems the same as C16. However C36 put emphasis on virtual meetings. It found in C16 and C36 their policy provides principles for the authorisation and arrangement of business trips and meetings as well as for the documentation and reimbursement of expenditures that arise on these occasions. Another large transport, storage and communication organisation's (C35) policy document provides guidance to employees and local management on how to organise and manage travel. The policy document mentions responsibilities, modes, expenses, arrangements, and entertainment expenses. The policy establishes group-wide standards as a reference point for line management and supporting functions such as HR, procurement and travel management. This policy document gives more details than other two (C16, C36) organisations. These large transport organisations give details on policy documents about general principals on personal effectiveness, business purpose and economic justifiability, best-buy philosophy, sustainability, safety, fairness, cost transparency. As usual these policy documents have sections on area of business travellers' responsibility, travel arrangements, using virtual meetings transportation expenses, lodging expenses, meal expenses, reimbursement.

5.4.4 Outcome of the policy document analysis

The documents discussed the scope of the policy, activities of line manager, colleagues, and provided mandatory requirements in detail about: receipts, reimbursement processes,

purchasing, exceptions, outside colleagues' expense procedures, travel requirements, and relocation expenses and sustainable means of transport. They also mentioned about standards of travel arrangements, means of travel, expenses and internal meetings, risk management during the travel, and gave guidance on specific working overseas, expenses management, and travel-related telecoms.

All the policies mentioned the scope of the policy responsibilities of business unit management, employees, travel arrangements, travel security, safety and export compliance, passports, visa and entry documents, health requirements, transportation, accommodation, use of mobiles while travel, payment methods, business expenses, non-reimbursable expenses, lost, stolen and damage luggage/property, content of the travel policies also cover disputes and complains, data protection, operative time, personal accident, money, cancellation, travel disruption, replacement and travel delay, rental vehicle excess, crisis containment management, health line plus additional endorsements.

After analysing the 21 documents it was found that the core purposes of the policy documents are to:

a) Ensure all employees have a clear and consistent understanding of policies and standards for business travel;

b) Provide business travellers with a reasonable level of service, comfort, personal health, safety and security at the optimum cost;

c) Maximise the organisation's ability to negotiate discounted rates with contracted suppliers (such as Airlines, Hotels, Car Rental and Rail Companies) and reduce travel; and to

d) Encourage sustainable and environmentally-friendly business travel.

Twenty organisations out of 21 mentioned that travel costs typically constitute a large share of the overall budget of their organisations. These travel costs included ticket cost and hotel cost (usually the visible costs of travel). Apart from the visible costs, there are at least three kinds of costs found that should be accounted for, these are: staff time, environmental cost and work-life balance.

Staff time: Even though the travel is done strictly for business purposes, the time spent in airplanes, airports, buses, and taxis for stopovers is generally less productive than time spent in the office, though there are exceptions as some travellers with the use of modern science and technologies make it possible for them to conduct productive office work without being

limited to a single location (Cairns *et al.,* 2014). For instance, the travel time including rest after long-haul travel, often consumes one or two full working days. This is not only time lost for traveller, but also for colleagues whose work may depend on input from the traveller.

Environmental cost: Out of 21 organisations, 15 organisations mentioned about the importance of environmental effect and sustainable business travel in the policy in the survey, although four of these made no mention of the environment in their written policy document. The survey organisations who have detailed sustainable travel strategies mentioned that to reduce the climate footprint of the travel undertaken the organisation has to determine:

    a) How many journeys are undertaken annually and the cost to the organisation;

    b) What mode and class of travel is normally used;

    c) Who is travelling and why;

    d) What rules are applied for approval and budgeting of travel;

    e) What requirements/incentives are put on the travel agent to provide travel options with lower carbon footprints.

Work-life balance: Business travel is often seen as being a necessary part of work, which is often inconvenient to the private life and family of the staff. Long days, nights and work on weekends while on business travel are not compensated for and such conditions can cause stress, and reduce work satisfaction and motivation and generate unproductive situations for the traveller. The costs, easily felt by the traveller, are difficult to quantify for the organisation. Figure 5.8 gives a detailed analysis of the work-life balance regulations among the survey organisations.

It is interesting to note that in the survey and in the policy documents there is no evidence of different rules and facilities on the basis of gender. All organisations have equal opportunities for male and female. In reviewing the literature it has been found that business travellers tend to be male (80%) and this is common around the world (Lian and Denstadli, 2004).

In summary, it was found from the business travel policies that the policy objectives alter according to sector and size, although the scope of the policies, general principals, and the descriptions of the responsibilities largely remain same. The data also revealed that the policies tend to mention targets, the scope of the business travel plan, and provide an action plan; that they discuss multi-mode solutions, e.g. walking, cycling, public transport, powered two wheelers, car, city car clubs; and that they seek to reduce the impacts of business travel cost. The policy documentation generally focuses on improving and raising awareness of

sustainable travel choices and impacts of travel, encouraging the use of more sustainable modes, and reducing travel-related CO2 emissions. The organisations suggest using virtual meetings in the policy, targets and scope of the business travel plan.

5.5 THE FUTURE OF BUSINESS TRAVEL

Looking to the future, two organisations [C11, C38] suggested that processes would need to better facilitate organisational business travel objectives whilst being adhered to by management and by employees. However, it was felt from the survey that delivering such a change was not straightforward due to a series of internal and external barriers.

Internally, the dominant barriers to change related to management issues around the implementation of any new process, in particular perceived staff resistance to changing business travel practices [18 organisations]; lack of senior management support for changing the system [C10]; and the sheer time and effort involved in altering how things were done [C30] were seen as daunting challenges. In addition, various operational 'administrative/technical concerns', such as keeping the booking process as simple as possible whilst being able to effectively assess the need for travel [C8]; obtaining useful and usable data [C23]; identifying suitable communication channels [C38]; and providing suitable alternatives to travel (through installing videoconferencing facilities for example) [C31]; were identified. On the other hand, however, it was recognised by five organisations that increasing cost constraints might lead to action being taken at some point in the future. Such comments tie closely with evidence from the literature, particularly Gustafson (2012), and AirPlus and ACTE, (2009), who pointed out that travel managers often have too low a status (and hence insufficient power) to take effective control over travel policy in many organisations. Also, that change was seen as being too difficult to consider even where business travel processes were recognised as not performing optimally (Gustafson, 2012; Zhang *et al.,* 2009).

In addressing these issues, the crux of the matter appears to be that business travel managers need to develop a case whereby the economic and environmental benefits of a new management process are seen to clearly outweigh the extant implementation and operational barriers. More specifically they need to:

1. Establish the operational context in which the business travel process functions. How much business travel is undertaken, when, by whom, for what purposes, by what mode,

and at what cost? What is the function of business travel in contributing to the overall objectives of the organisation?

2. Evaluate the extent to which the existing process is optimal against its operational objectives. To what degree are these internal to the process (and hence manageable) and external (unmanageable)?

3. Identify the issues preventing the process from reaching its optimal state.

4. Design a new business travel management process, taking care to consider how it would fit within the organisational structure, and the services and tools that would be required.

5. Construct a business case detailing how and why it would be an improvement on the existing process for each of the key stakeholder groups and for the organisation as a whole.

6. Communicate the findings to senior management in a manner that would encourage them to act on the information.

7. Communicate the findings to staff members who would be affected in a way that would enable them to see how they and the organisation would benefit as a result.

8. Devise an implementation plan. Will the process be introduced incrementally, perhaps through a pilot in a single department, or in one go? Who will be responsible for its introduction? Will there be any training requirements?

9. Set up a monitoring regime to determine how well or otherwise the system is operating, and consider making any adjustments should they be necessary.

External issues were seemingly rather less significant, and included locational related issues such as low quality/high cost transport alternatives [three organisations]; and local government transport and planning policy [C25]. In this regard, Aguilera and Proulhac (2015, p 30) noted that "*Business travel is often the second largest expenditure item in corporate budgets, and organisations are therefore increasingly introducing strategies aimed at reducing spending on travel*". Business travel trips are paid by the employer (Swarbrooke and Horner, 2001). Also, business travel is made by individuals like top managers, whilst the self-employed, or travellers in certain technical positions within organisations can also be associated with the need for travel (Aguiléra *et al*., 2007, Aguilera and Proulhac, 2015). Travel options therefore need to account for these characteristics by providing value for money services that are reliable, flexible and conveniently timed, and comfortable with facilities to allow people to be 'productive' if they want/need to be.

There are a number of actions that Government (and other stakeholders such as transport operators, consultants, and software developers) can take in supporting organisations to develop 'better' business travel management processes. In particular, Enoch (2012) noted that business travel (under the guise of a 'travel plan') could benefit from such stakeholders providing appropriate services. These could include:

- developing and disseminating business-focused information on the 'real costs' of not 'properly' managing business travel and the benefits of doing so;

- training and educating business travel managers to more effectively do their jobs through enhancing marketing and communication skills, for example;

- subsidising business travel management processes that were aligned with 'public policy priorities' either directly through financial or 'in-kind' support, and/or indirectly through the fiscal system;

- introducing regulations that compelled organisations to 'better manage' their business travel processes; and

- considering how broader policy decisions relating to tax for instance, might impact on business travel management procedures.

5.6 SUMMARY

Business travel is a crucial component of industrial economies, but has been relatively ignored as a topic of interest by academics, policy makers, and by organisations themselves.

In terms of the business travel process, the survey found that:

- The only identifiable relationship between type of business travel management process and organisation type or size was that larger organisations tended to have more formalised management processes than smaller ones;

- Considering business travel objectives, improving efficiency (i.e. in terms of time, gathering accurate information, using common sense, facilitating event activity/client reporting) and cost reduction were seen as being the most important. Perhaps unsurprisingly, public sector organisations were more aware of policy-driven inputs and rather less concerned about the need to improve the efficiency of the business travel process than private sector firms;

- Business travel in the sampled organisations was most often managed within Human Resource departments, followed by Sales and Marketing, Finance, and

- Procurement/Purchasing, whilst only one organisation completely outsourced the management of the business travel function;

- Despite this, the most used type of service provider to be the Travel Management Company or TMC, whilst the other currently used service providers are Corporate Card Providers; Rail Booking services; and Hotel Booking Services; and

- The most commonly used technologies used by organisations to help manage the business travel management process related to Mobile Telecommunications; Self Booking Tools; and Video Conferencing or Telepresence.

Next, the survey found that business travel expenditure ranged up to £GBP 140 million, and that the Finance; Education, Health and Social Work; Electric, Gas and Water supply sectors spent the most. In total, 39% was for external meetings, 18% of business travel was undertaken for internal meetings, 18% was for conferences, 10% was for training and education, 10% for site visits and 5% was for attending trade fairs. Of this, 40% of trips were undertaken by air, 34% by private car, 15% by car hire and pool car; 8% by rail and bus; 1% by bus; 1% by cycle and 1% on foot.

Meanwhile trip-related factors (particularly cost and flexibility of travel, flexibility, quality of accommodation and traveller security) were found to be the most significant factors in dictating the amount of business travel. Also influential are organisational and employee factors – employees of larger and medium-sized organisations travel more.

Finally, for the discipline to evolve in the future, business travel managers within organisations will need to overcome their fears about staff resistance to changing business travel rules, as well as the disinterest of senior management, likely by convincing them of the economic and environmental benefits of doing so. Policy makers will also need to be engaged to pay more attention to the needs of the business travel sector in a way that they have not been up until now.

Overall, previous research on business travel process management is relatively scarce. Accordingly this thesis reports the results of an in-depth survey of how 41 UK organisations from a range of business sectors manage their business travel, so as to provide an understanding as to the issues they face as organisations, and as to how these may be addressed by society more broadly.

CHAPTER SIX

CASE STUDY ONE

6.1 INTRODUCTION

This chapter focuses on introducing the key findings and analysis of Case Study One. Previously Chapter Three, Section 3.5.4 introduced the aim and objectives, plus the rationale for selecting the case study organisation. In this chapter, Section 6.2 provides background information of the case study organisation; Section 6.3 presents the key findings of Case Study One; Section 6.4 presents the BPM for Case Study One; Section 6.5 provides the analysis of Case Study One; and Section 6.7 gives a summary of the chapter.

6.2 BACKGROUND OF CASE STUDY ONE ORGANISATION

This section provide background information (organisation size, employee number, organisation types, turnover, business travel spend) of Case Study One organisation. A single research-based higher educational organisation in the UK was selected as the first case study organisation. The initial review process or the documentary analysis found that this organisation employs in excess of 3,500 staff, and has approximately 13,000 full-time students and over 2,000 part-time students (Educational Organisation Statistics, 2012). The annual turnover of this organisation is approximately £220 million (Educational Organisation Statistics, 2012). It houses ten academic disciplines occupying a range of fields such as, arts and humanities, science and engineering, and has around 40 research centres. Every academic school undertakes research that is internationally recognised, with seventy per cent of the research being carried out in collaboration with many global, blue-chip companies.

This large educational organisation undertakes a substantial amount of business travel per year. For the year 2010, business travel spend was over £1.5 million. It has a travel plan (Educational Organisation Travel Plan, 2010) and highlights the benefits of car sharing to both its employees and students in order to reduce the number of single occupancy car journeys. It also promotes cycling to work by emphasising the health and safety benefits on top of an environmental message.

Table 6.1 gives the background of the case study organisation which was found from the *Initial Review* process (documentary analysis) and a previous survey (Chapter Five) for this research.

Table 6.1 Background information for Case Study One Organisation.

Number of Employees	Turnover (£)	Spend on Business Travel (2010) (£)	Organisation Sector
3,500 (UK)	220, 000, 000	1,500,000	Higher Education

The job titles of the individuals are interviewed and the 'indicators' used to identify them are included in Table 6.2. A total of eight interviews were conducted. The interviewees were identified on the basis of their job roles and their involvement in business travel management practices. Their roles ranged from those at a high level involved in travel policy development and its management across the organisation to those who operationalised these strategic policy requirements. The travel policies and subsequent management practices inadvertently impact on travellers. To understand their impact on travellers, they were also interviewed. Interviews were undertaken to develop a better understanding of the organisation's efforts to manage business travel activities. The questionnaire (Appendix Four) broadly covers the process related information, context: factors influencing the level of business travel, outcomes of business travel and future of business travel. Details of this are found in Section 6.3.

Table 6.2 Background of Staff Interviewed in Case Study One Organisation.

Job Title and Interview Indicator
Director or Policy Makers **(E-PM1)**
Strategic Administrators **(E-SA1, E-SA2)**
Tactical Administrators **(E-TA1, E-TA2)**
Experienced User **(E-EU1, E-EU2)**   New User **(E-NU1)**

The reason for selecting eight interviewees (Table 6.2) was a '*systematic interview*' (Yin, 2003, p.73) which is undertaken according to the responsibilities and job roles of the interviewees regarding to the business travel process management and followed the design and data collection units of analysis (Figure 6.1).

Data Collection Source

	From an individual (interviewee)	From an organisation	
D e s i g n About an organisation	How the organisation's business travel process works, and why it works explains by different individual.	Travel policies Organisational effects on policies.	→ Study Conclusion
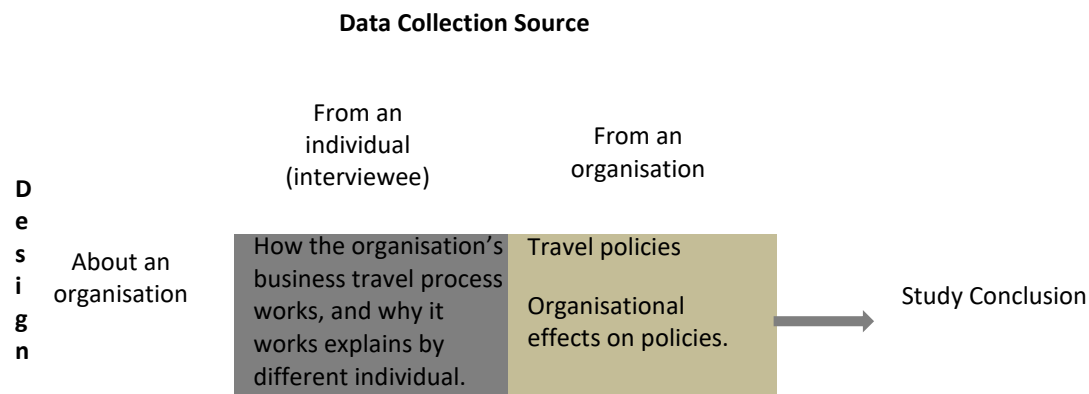
Figure: 6.1 Design vs Data Collection Units of Analysis (Adapted from Yin, 2003).

Figure 6.1 illustrates the data collection sources and design. These data collection sources are the interviewees and the organisation. In the figure 6.1, 'design' is the questionnaire (Appendix Four) prepared for the interviewees and documentary identification about policies and outcomes of the organisation. Individual interviewee has been asked about their opinion about how the organisation's works and why it works and then the results were compared to see similarities and differences in opinions. The policy for the organisation is equal for all departments and travellers so as a starting point eight interviewees from five job roles were selected. These job roles are: policy maker, strategic administrator, tactical administrator, experienced traveller and new traveller (reason for selecting these job roles has been discussed in Chapter Four, Section 3.5.4). According to Yin (2003, p.86), "*a smaller pool that is the subject of case studies and a larger pool that is the subject of a survey*". So even though many individuals are involved with undertaking and managing business travel in Case Study One, only key respondents (Figure 6.3) were selected who gave their insights into certain occurrences (Yin, 2003; Grix, 2010). Also, while conducting the study it has been found that the information from the respondents is repetitive and data found from the interviewees are sufficient to draw the conclusion of the case study.

6.3 KEY FINDINGS OF CASE STUDY ONE

6.3.1 Currently Available Policies for Managing Business Travel

From the *initial review* process it was found that this educational organisation has a defined strategic plan for its staff to achieve the highest standards of performance (Travel, Expenses and Benefits Policy, Educational Organisation Strategic Plan, 2010). It also has an equality and diversity action plan in which one of the main objectives is to improve transport facilities across the campus for the students, staff and visitors (Educational Organisation Travel Plan, 2009).

The Case Study One organisation has a travel plan (TP) which is based on the results of staff and student travel surveys that were conducted in 2010. The educational organisation survey provided an evidence base for the travel plan, and ensures that the targets and actions within the plan are achievable and realistic. The travel plan of this educational organisation is intended to provide a guideline for actions to be carried out by the organisation over the next five years.

The travel plan of Case Study One aims to reduce the number of single occupancy car journeys and reduce the number of parking spaces. From the Educational Organisation Travel Plan report (2009), it was found that limited car sharing currently takes place and that the idea of providing an open access pool car for staff is not currently supported. Car hire for specific university business purposes is provided by a local company.

Looking especially at business travel, from the *initial review* process it was found that this organisation has designed a travel policy that outlines responsibilities for the travellers with regards to managing expenditure when undertaking domestic and international travel. The objectives of the Travel, Expenses and Benefits Policy (2010) are to:

- define the policy and the process;
- set guidelines for the types of expenditure that can be reimbursed and those that cannot be re-claimed;
- inform all staff about their responsibilities for the booking process relating to approvals and claims;
- provide an efficient service;
- achieve value for money;
- ensure that the organisation complies with government law and policy; and

- minimise the carbon footprint.

The organisation has a detailed policy document which outlines the organisation's responsibilities relating to travel. This includes; domestic travel, overseas travel, hotel accommodation, partners' expenses, foreign currency, university purchasing cards, payment of travel advances, car travel and related issues, production of receipts, personal incidental expenditure, alcoholic beverages, entertainment, staff working lunches, home telephone and broadband costs, mobile telephones provided to employees, professional subscriptions, travel insurance and relocation expenses.

From the *initial review* process it is evident that this organisation has nominated travel management companies (TMCs). According to the purchasing strategic manager ESA1, "*This organisation has a Travel Policy and the Travel Management Companies help us to endorse this*". The travel policy dictates pricing and protocol. The TMCs follow the protocol and manage the business travel booking process for the organisation. Expert interview findings suggest that this organisation does not currently allow for first or business class travel, in order to save costs [E-PM1, E-SA1]. TMCs help to enforce cost savings by booking cheaper tickets. Professors were allowed first class tickets when travelling by rail, but new rules now require everyone to travel economy class [E-PM1]. No business class tickets are allowed for air travel, except under special medical related circumstances.

6.3.2 Context of Current Process Related Information

Through the *impact review* (in-depth interviews) of Case Study One, it was noted that the business travel decision making and booking processes are taken at the school level. Here, the line managers decide whether or not to approve staff business travel trips. There is also a central system, where finance officers approve the main TMCs. However, the majority of the process is decentralised and each school is responsible for their own bookings according to their individual requirements. The list of strategic and implementation level roles that are related to business travel in the Case Study One organisation are included in Table 6.2 which presents the details of the business travel process related bodies.

Figure 6.2 presents the links between all ten schools, external and internal bodies that managing or undertaking business travel. This figure helps to see the business travel process of the Case Study One organisation from a 'top down' approach to gain insight into the organisation's compositional sub-systems. Here the business travel process of the Case Study

One organisation has been divided into three stages: the strategic level, the implementation level, and interfaces. All 21 schools and departments are linked with TMCs, organisational committees and the organisational council. The description of the three stages is given below.
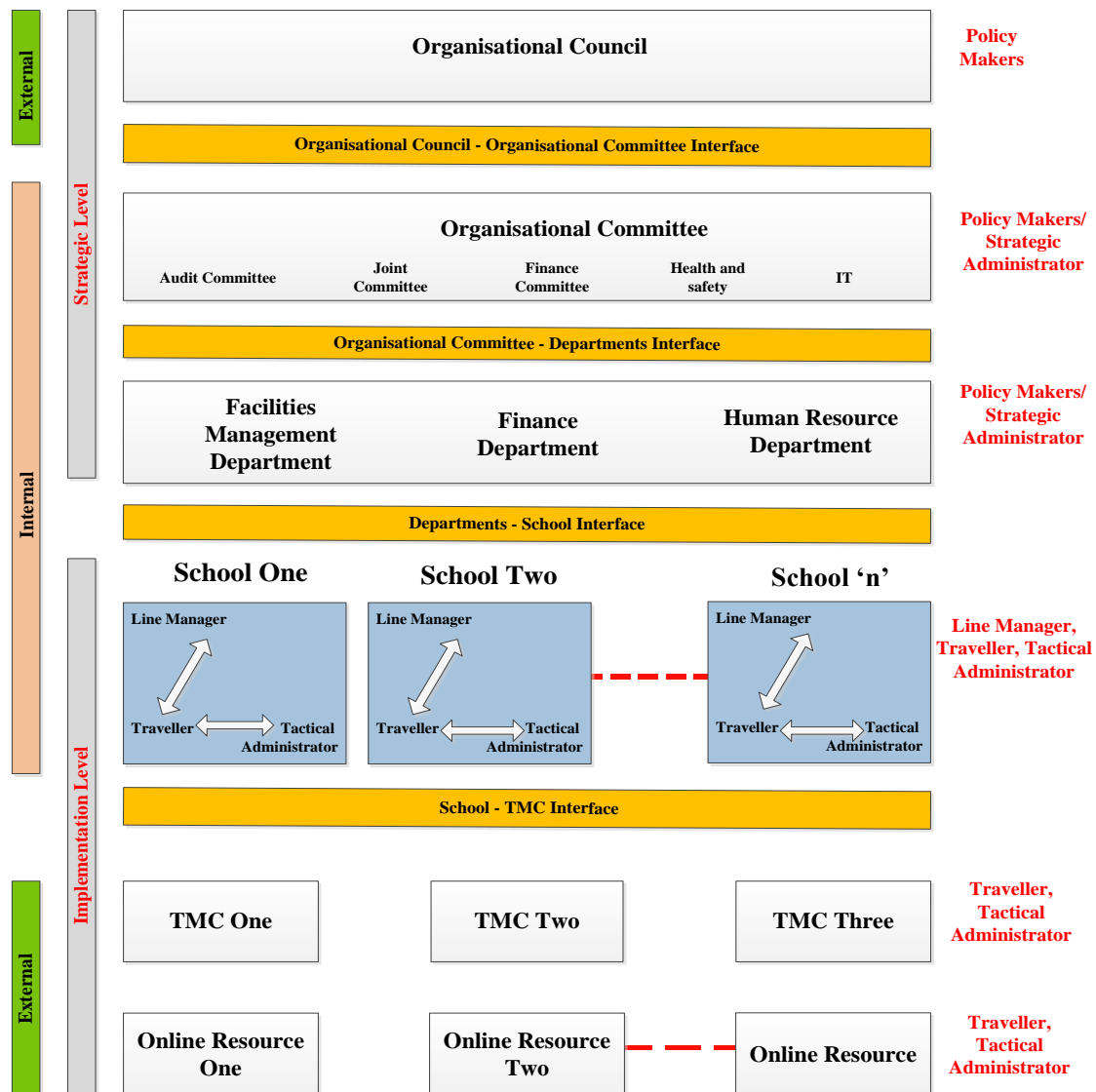
Figure 6.2 Case Study One Business Travel Process Management Related Bodies.

Interfaces

In Figure 6.3 interfaces are the shared boundaries across two stages that separate the organisation's departments and committees that are involved with business travel by different bodies. The top three interfaces are undertaken by general meetings, email, telephone and agenda of the travel policies to develop business travel. In some cases individuals develop

policies to modify the business travel process such as; organisational council, organisational committee interface can develop policies for the schools/departments. The last interface (school-TMCs) is done through email, fax, and telephone.

The Strategic Level

Strategic level management involves the formulation and implementation of the major goals and initiatives taken by a company's top management on behalf of owners, based on consideration of resources and an assessment of the internal and external environments in which the organisation competes (Nag *et al.*, 2007). In Case Study One, the strategic level comprises of policy makers and strategic administrators, who work at organisational council (external bodies), organisational committee (internal bodies) and the organisational departments (internal bodies). At this level, the policy makers and the strategic administrators develop the organisational policies and alter them as required.

Implementation Level

Implementation level management is where any organisation carries out, executes, or practices a plan, a method, or any specification, standard or policy for an action. Case Study One implementation level consists of line managers, tactical administrators and travellers (who are all internal bodies), and three TMCs (three TMCs used until February 2015, currently using one). TMC uses external suppliers, such as airlines and hotels by direct online contact. At this level, the organisation applies the organisational policy in order to undertake business travel and complete the travel. The organisation is currently running an experiment to use one designated TMC instead of three (Figure 6.3). Travel booked via one TMC will be carried out from February 2015 to May 2016, at which point the organisation will analyse progress and move forward. Moving forward may include refinement to the process or further testing of the process. If the process is not successful the organisation may go back to using three TMCs, however the reason for using one TMC currently is travel booked via one TMC gives cheaper rates on flights, hotels, and offers from the TMC.

Changed Travel workflow of Case Study One Organisation
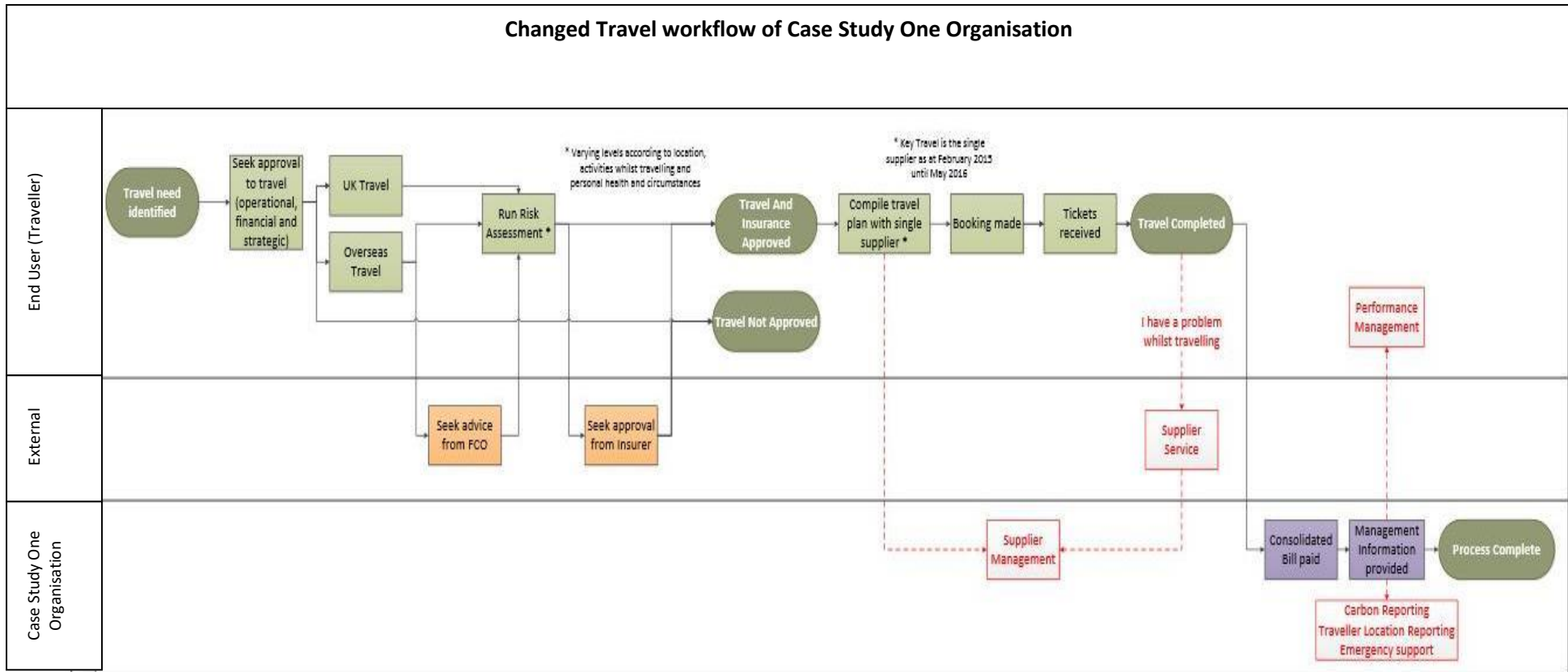
Figure: 6.3 Changed Travel Workflow of Case Study One Organisation (Source: Screenshot of Controlled Document in Case Study One Organisation

Detailed Description of Business Travel Process of Case Study One Organisation

The *Initial Review* revealed that Case Study One organisation's travel booking process in 2010 was undertaken in two ways: either by booking travel through designated individuals from within the organisation (i.e. tactical administrator staff), or by the travellers booking independently, where the travellers provided their relevant receipts and then claimed back expenses. It can be seen from the business travel policy maker's perspective [E-PM1] that the organisation still had a policy in 2010 for the traveller to book their own tickets and then claim the money back by showing evidence (tickets, receipts). However, the policy maker also mentioned that this system needed to change, "*I personally think it should be centralised and very restricted but it isn't*" [E-PM1]. Policy maker [E-PM1] mentioned in the new policy there will not be an option for individual travellers to book their own tickets, because by using a TMC the organisation can save on cost of travel in the long run. To manage the booking process, the policy maker's [E-PM1] aim is to have a future objective to book 100% of travel through the TMCs. According to E-PM1, E-SA1, and E-SA2, Case Study One's business travel process does not fully meet its stated objectives (organisation objectives are discussed in Section 6.3.1). Only around 50% of spending is through the approved TMCs and the policy aim is to increase that percentage up to 100% [E-PM1, E-SA1, and E-SA2]. This organisation can experience unusual spending where the travellers seek alternative quotes online, book directly, and then claim back through expenses. According to E-SA1, "*the organisation is striving to improve the contract and make it more attractive to users. It also hopes to have a high level management endorsement of the agreements to encourage users to use it. Those that use our agreements benefit from value added services including 24/7 contact, after sales support and duty of care*".

It has been found from the documentary analysis in 2015 the organisation is running an experiment (Figure 6.3) to book all travel via one TMC [Changed Travel Controlled Document, 2015]. The document suggests that, in the new process the travellers need to get approval of travel from operational line managers at strategic level. Academics do not need approval; however they have to complete an overseas travel form for international travel which the head of school signs before the travel commences. All travellers need to run risk assessment at varying levels according to location, activities whilst travelling and personal health and circumstances. In this phase, external bodies like the FCO (Foreign and Commonwealth) office can be involved to give advice and external travel insurance approval

needed for international travel. It is noticeable in this new workflow that direct booking via Expedia by travellers does not exist as the travel agency fulfils the needs of all bookings. Most costs for transport and hotels are paid by the organisation before travel, however any cost that has not been paid before (i.e, food, any further transport at meeting place) are reimbursed after travel is undertaken. The consolidated bills are processed by the finance department and they provide the management information to designated department administrators and school operations managers. Performance management is carried out by the traveller's line manager in the event that travel has been booked inappropriately. Carbon reporting is undertaken by the Sustainability Office with the facilities management department.

To describe further improvement, the policy maker [E-EPM1] suggested that the organisation can give more infrastructure support to travellers in the future. For instance, if the organisation had provisions for video conferencing facilities, they could contribute to reducing the need for travel. The policy maker was happy with the benefits and supports provided by the organisation for travellers. According to the policy maker [E-PM1] the business travel policy sets out to deliver a good output in terms of business travel and excellent academic research. By good output the policy maker indicates that the organisation is supportive for the researchers to undertake travel for more research and thus, the organisation is one of the leading educational organisations in the UK (both academically and operationally).

The tactical administrator [E-TA2] suggested that the previous system was simple and easy to use. According to E-TA2, previously in the first instance a tactical administrator had to use the organisation's purchasing catalogue for travel related purchases, which limits the approved TMCs. However, the organisation's increasing use of credit cards made it quicker to book travel direct, plus the schools did not need to pay agency fees as they would have done if they had booking through the TMCs. The credit cards are limited and controlled by the organisation. According to E-TA2, currently they follow the organisational strategy, so if an academic wishes to travel, the academic approaches the tactical administrator who books the travel on their behalf via a TMC. The strategy for the tactical administrator requires them to always use an approved TMC. Previously if the TMC could not give a competitive rate the tactical administrator could contact the finance department for approval to book the tickets without the help of the TMCs. However, currently Case Study One finance office does not like to reimburse expenses bookings via Expedia/online self-booking anymore [E-TA2].

All travel purchases via TMC are processed online, so the finance office can monitor the spending of the school. However, one tactical administrator [E-TA1] does not support the policy of booking all travel through TMC's. This respondent suggests that the individual tactical administrators do not have enough choice when selecting suppliers (e.g. airlines, hotels). This is because the finance office has limited options available to them by TMC. E-TA1 found this frustrating because the TMC rate is often quoted as higher, so instead the E-TA1 proposed that the tactical administrators should be allowed to *compare* prices and book the cheapest. However, the E-TA1 did agree that the TMCs provide better services. So, after booking tickets/hotels, each TMC sends an invoice to the tactical administrator who then sends it to finance. Where the tactical administrator has to use credit cards (i.e. if they want to book car hire) and after receiving the invoice, the tactical administrator attaches the credit card slip to the invoice for claiming back the money from the appropriate budget code.

The above discussion gives a view of the current process in the Case Study One organisation. Figure 6.4 represents the business travel management process. It shows that the tactical administrators and the TMCs work as a link between the strategic level and the implementation level.
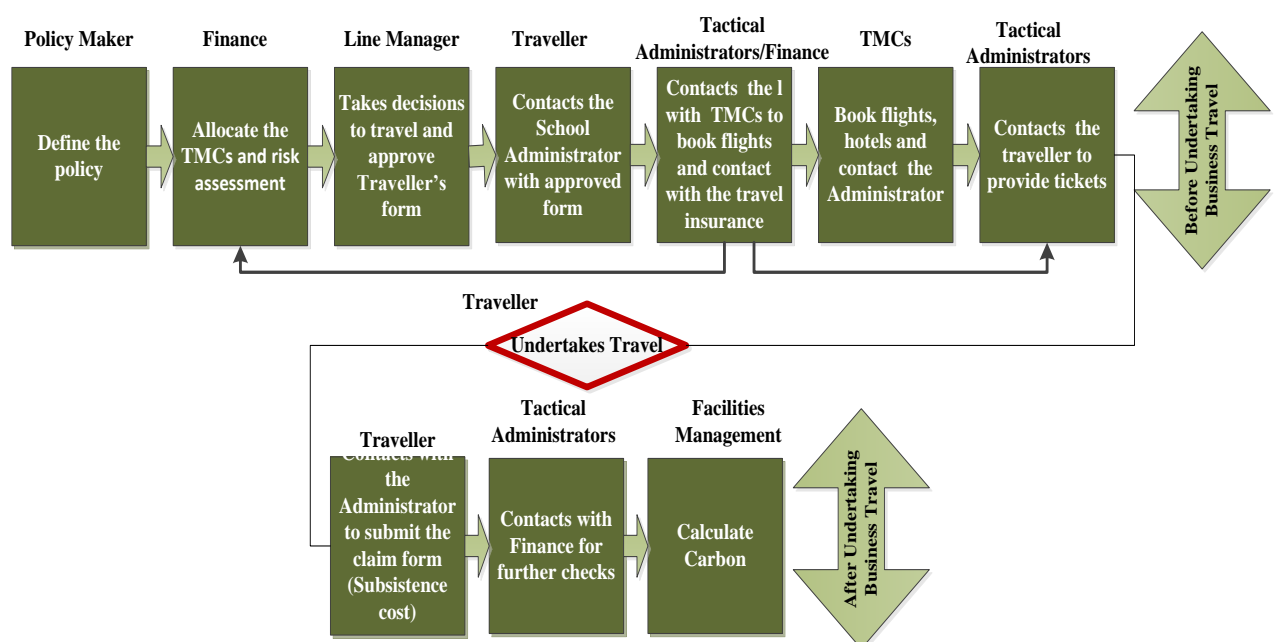
Figure 6.4 Business Travel Management Process in Case Study One Organisation.

After approval of travel, the traveller needs to get a risk assessment by the finance department before travelling abroad or to a remote area [E-SA1]. However, not all travellers and tactical administrators were found to be aware of this risk assessment of travellers safety and often travelld without the risk assessment documentation. Through this case study it is noted that the tactical administrator's view of the current system differs from those of the policy maker and the strategic administrators. Both tactical administrators [E-TA1, E-TA2] mentioned that the main priority when booking a ticket is how and where to obtain the cheapest ticket, either from a TMC or from a personal search using the Internet. By contrast, the policy maker and the strategic administrators [E-PM1, E-SA1, E-SA2] suggested not to book the cheapest tickets from the Internet but instead to book via a TMC. One important view from the policy maker and strategic administrators was that, in the long run, using TMCs are helpful. To describe this, E-SA2 suggested that if more trips were booked through the TMCs, they would give better offers in the future. Furthermore the E-SA2 suggested that if the travellers book their own tickets they do not receive a 24 hour duty of care, so when individuals go through self- booking e.g. Expedia, or a travel super-market, there is always a fee, or a penalty for cancelling bookings or late fees while booking travel online using a self-booking system. This is usually equivalent to the fees that the bulk of the approved suppliers/TMCs provide as a *best rate*. In this case, the policy maker and the strategic administrators, and TMCs may not be the best option for the individual customer, but they are for the organisation, due to the incentive of competitive rates and best protection. E-SA2 also mentioned that, booking travel via the Internet is cheaper, unless the organisation is consistent with purchasing travel through a supplier in which case it is possible to bargain a better deal in future.

In terms of carbon calculating the policy maker [E-PM1] mentioned, carbon calculating is becoming much more important because the Higher Education Funding Council for England (HEFCE) is aiming to have each higher educational organisation report their annual carbon emissions. Therefore in 2011, the organisation was set a mandatory requirement (Scope 3) to report carbon emissions from their fleet vehicles. Scope 3 is a corporate climate change strategy that requires a detailed understanding of a company's greenhouse gas (GHG) emissions (Greenhouse Gas Protocol (2013). The policy maker [E-PM1] noted that the organisation "*has to start to report on the actual emissions associated with it so it is becoming very high profile*". S/he also mentioned that it is going to be very difficult because the organisation does not use a centralised supplier yet who gives a carbon footprint calculation each time a rail ticket or air ticket is booked. It is noticeable in the previous travel

booking system that a large range of people used to book their travel independently, so the carbon emissions could not be captured. In which case, the only way to capture carbon emissions was to examine each traveller's expenses. This is a manual administrative job and takes both time and effort. Currently the organisation is trying to get a centralised TMC who gives all records of traveller's mileage and organisation thus calculates the carbon footprint.

E-PM1 stated that the system needs to change when it comes to booking air tickets. In theory it is often cheaper to book online, however, if any traveller spends half a morning looking for a cheap flight by trawling the internet, then actually it could generate a cost as their time is lost. According to the Strategic Level interviewee [E-SA1], fares are not the biggest issue, but *value for money* is, i.e. time is the most precious commodity and anything that saves time is worthwhile.

The tactical administrator E-TA1 plus all of the travellers interviewed [E-EU1, E-EU2, E-NU1] suggested that the current business travel booking process is 'overly complicated'. For example, sometimes on the train a first class ticket price is actually cheaper than a 2nd class ticket. However, as the organisation does not allow bookings of 1st class tickets even in such cases, the tactical administrators are disallowed from booking the cheaper ones without obtaining special permission from a higher level, which can be time consuming. In reality, the approved TMCs for this organisation charges are expensive and the travellers and the tactical administrators find the online booking service to be both cheaper and quicker.

The case study results suggest that the current process is acceptable to members of the organisation, but in some cases problems arise which the organisation wants to overcome. In summary, the strategic level wants only tactical administrators and TMCs to book travel. Yet, the implementation level wants *flexibility of choice* when booking the tickets. According to those at the implementation level [E-EU1, E-EU2, E-NU1], increased flexibility can save a traveller's time resources as well as cost, by allowing cheaper tickets to be booked. Figure 6.4 shows advantages and disadvantages of TMC and Individual booking.

Advantages	Disadvantages
- Using TMCs will be helpful for the long run; - Full refund in cancellation; - 24 hour duty of care; and - Easy for calculate carbon emission.	- Costly for short term; - Often perceived as being time consuming; - Needs more technical support for the TMCs; - Problems arise in case of shortage of staffs in organisation to book travel with TMCs; and - No last minute booking.

TMC → Individual Booking

Advantages	Disadvantages
- Traveller can book ticket at the last minute; - Cost effective in the short term; and - Quicker.	-Difficult for carbon calculating; - Organisation cannot save cost for the longer run.

TMC → Individual Booking

Figure 6.5 Advantages and Disadvantages of Using Individual Bookings and TMC

6.3.3 Outcomes of the Process

From the case study interviews it was found that business travel by senior management accounts for approximately 10% of this educational organisation's business travel, whilst academics and middle management accounts for 60%, and operational staff and student travel accounts for 30%. The turnover for this organisation is approximately £220 million while their spend on annual business travel is £1.5 million. So more than half of business travel is done by academics and middle management, who are not directly involved with developing travel policies, as the impact review process revealed the travel policy is developed at the strategic level by senior management. So to establish the new travel policy the senior management needs to alert travellers about what changes had made in the travel policy.

From the *initial review* process or documentary analysis it was found that only 13% of staff travel off campus for business once a week or more; 20% travel between once a week and once a month, 59% travel less than once a month, and 27% never travel for business at all. Those that drive to work are the most likely to travel frequently for business purposes. However, less than 20% of car drivers stated that they travel once a week or more for business purposes.

It was also found from the documentary analysis that the car is the most popular mode for completing off-campus business travel. Furthermore, 39% of staff stated that they primarily travel by car (alone) when undertaking business travel, which is closely followed by train travel with a 35% mode share.

The interviewees were asked what are the employee factors that influence business travel. The policy maker [E-PM1] and strategic administrators [E-SA1, E-SA2]. strongly agreed about mobility of employees, hierarchical position, income and disagreed about gender. All tactical administrator and most of travellers agreed about mobility of employees, hierarchical position and were unsure about income and gender. However one traveller [E-EU1] agreed that gender also influences business travel. Both the strategic level (policy maker, strategic administrators) and the implementation level (tactical administrators, travellers) staff interviewees noted some barriers to the current management process. However, the barriers noted by members of the two levels are contradictory. Detail of the barriers are illustrated and described in Table 6.3.

Table 6.3 Current Business Travel Process Barriers.

Strategic Level (Barriers)		Implementation Level (Barriers)	
Measuring the carbon foot-print is a challenge	Previously when travellers booked their own ticket, the only way to calculate carbon emissions was to go through expenses. This is a manual administrative job and difficult to manage (E-PM1). The organisation does not yet use a centralised TMC which gives a carbon footprint calculation each time a rail ticket or air ticket is booked.	*Little support for video conferencing*	According to E-EU1 and E-NU1 this organisation has not got sufficient facilities in place for video conferencing. Instead, employees are required to use free software like Skype.
Not much has been done to reduce business travel mileage	According to E-PM1, "in terms of business travel there's not been a huge amount done. We have done an enormous amount on the campus. We are trying to reduce our single vehicle occupancy and discourage people bringing cars to campus and use public transport, bicycles and walk. However, in terms of our business mileage impact we have not focused a lot on the potential yet".	*Less use of mobile*	The organisation does not provide any mobile phones to the majority of the staff who travel abroad frequently. Therefore, when they are abroad they use their own telephone, but often they can claim the cost (E-EU1, E-EU2).
Needs behavioural change	E-PM1 mentioned that "it's cultural so it will require behavioural change. It's what people are used to. It will have to be policy driven".	*Getting a visa for another country is difficult*	According to the strategic administrator, E-SA1, if the traveller goes to a country for which they need a visa, it has to be applied for by the traveller themselves as the organisation does not have a service that will process the visa. Sometimes TMCs can do the visa service and in that case the traveller has to contact the TMC. There are two options. One way is to just outsource this matter to the TMCs. The other is that the traveller can apply for their visa on their own (if they have time and the luxury to do so. However, the cost could be high as the traveller could end up wasting a couple of days of their time).
Staff prefer online facilities to TMC	E-SA1 noted "We need evidence that the prices we pay for travel are competitive and that we are achieving value for money. There are loads of on-line facilities available which offer perceived savings and we need to enforce the use of TMCs over these".	*Complying with the policy/system is not always possible for travellers*	The finance department of this organisation ensures that all travel policy is followed. Certain countries are more expensive (food/beverage, transport) so travellers must not purchase anything that is 'extreme'. The rule is that all travellers must comply with the policy, keep their receipts and attach them with form which then gets signed off by their line manager. The finance department goes through every single itemised transaction and makes sure that

			it is consistent with the policy. E-AT2 however mentions a problem in this regard that if anyone has to travel to more remote areas, then processing claims becomes very difficult as receipts may not always be issued because of the very strict rules, then travellers cannot always comply with that yet. E-AT2 suggested that, "the finance department needs to aware of what is happening" and if people travel to remote areas then the claiming process needs to be sufficiently flexible.
Staff unwilling to change	Departments and travellers reluctance to change (E-SA1)	*Often shortage of staff*	This was the case where in one department only two tactical administrators held university credit cards. If one is absent then the remaining person is under increased pressure to process all of the travel requests and if both are absent then the traveller may have no option but to book on their own and then claim back later.
		Lack of communication	E-EU2 also mentioned about lack of communication between the finance department and the traveller. There are many things in the new system that the traveller is not aware of, for example: the university approved TMC charge an additional £1 for each ticket they book. When the traveller asked the reason for this charge, the finance department mentioned that it has been charged by the TMC to keep records of who is travelling, when they are travelling, and where they are travelling to. The fee covers the data management system, which is sent afterwards to the university on a monthly basis. This means the university can get the breakdown of staff travel. Even though this can be very valuable information (because the organisation can see where savings can be made e.g. if a member of staff buys expensive tickets which they don't need to), many travellers are certainly not aware of this. So there is evidence of a lack of communication.

In summary, the main barriers of the current business travel process (in Case Study One Organisation) are that the organisation needs to present evidence for the price they pay for travel. There are online facilities available which offer perceived savings and the organisation needs to enforce the use of TMCs over these. It would be ideal to have an online solution where travellers can input their specific preferences in order for the tactical administrators to book their travel with these in mind. However, better value for money is the main motivation for changing the business travel process, as in the current economic climate all organisations are required to make savings. The policy maker of the organisation believes that the use of TMCs and book travel 100% by the TMCs can give the value for money. Overall, business travellers where possible need to organise their work schedules to avoid last minute bookings, and they should also strive to avoid unnecessary travel by planning ahead or conducting suitable alternatives such as video-conferencing.

6.3.4 The Future of Business Travel

According to the policy maker E-PM1, "*The organisation has introduced a sustainable procurement policy recently, so we are moving in the right direction, but in terms of business travel there's not been a huge amount of policy change done*". The organisation has acted to limit the effects of reducing single occupancy vehicle (privately operated vehicle whose only occupant is the driver) and also discourages people from bringing cars on to the campus. Instead, it has encouraged the use of bicycles, walking and travelling via public transport. However, in terms of travel, the organisation has not yet focused on the potential that the policy maker suggested. For the future, policy maker E-PM1 also mentioned that, "*The organisation needs to review its business travel systems and then to set a new policy. A new system would be centralised, and only nominated people could book travel through the allocated TMCs meaning they would stop all individual bookings. This would mean the system would be much more controlled*".

E-SA1 suggested changes initially need to be driven by the purchasing department, but the key stakeholders need to be kept involved, and once new relationships are created, a top level influence from the executive leadership will be needed. To make changes in future, all individuals related to the sustainability team, executive leadership team, legislation and procurement department will have a role. So the change would be collaborative.

According to policy maker E-PM1, "*one of the issues in the past was that people were quite possessive about their travel habits. Some academics in the institution and lot of our researchers need to travel all over the world. So if we are then seen to be checking through their expenses and how they make those travel arrangements it can be little controversial*".

Therefore, going forward the organisation needs support from all levels of staff. Making any changes is not easy because schools and travellers can be reluctant to change. For any type of change both the strategic and implementation levels have to be satisfied.

All the users suggested that the priorities in a management process are the cost savings, the flexibility of travel, and an easy to use booking system. E-EU1 suggested that better documentation of travel processes would also help. They gave an example, where if anyone travels from London to Paris they will need a taxi from home to the airport, and then they need a flight to Paris, then rail and taxi to the final destination. Travellers may need to claim their money when they are back in an easier process. For instance, they could mention the total they spent, rather than making a note of where was the taxi, what was the purpose of taking it. To describe the future of the business travel process in the organisations, the users group or implementation level gave different thoughts compared with the strategic level. According to E-EU2, ideally individual members of staff would have the power to make decisions regarding their choice of business travel. For instance, which mode to use, and where they need to go to book travel. However, if changes are made by the policy makers, then there needs to be more consultation with the implementation level staff. Outcomes of this consultation should be communicated in-house in order to explain any proposed changes. Also it would be useful to the organisations and broadly for society if the environmental agenda was addressed more rigorously.

E-PM1 suggested that "*an ideal business travel*" process would result in less travel in general, through the increased use of video conferencing, and the use and advancement of an IT alternative. Where it is necessary to travel, there would be a definite encouragement to use public transport in the first instance, so support from the organisation would be essential when ensuring colleagues could limit the use of cars, unless absolutely necessary. Moreover, the organisation should encourage more measured judgement regarding the necessity of the trip.

6.4 BPM FOR CASE STUDY ONE

The preceding sections shed light on the issues concerning the current business travel management processes. This section will utilise business process mapping techniques such as IDEF0 to model the actions and activities of the case study organisation and provide a comprehensive description of the 'system' through the use of inputs, controls, outputs and mechanisms (ICOMs). Through the Business Process Model (BPM), graphical representations of business activities are achievable (see Chapter Three for more details on this). Among all the techniques, the most popular is process mapping (Popovic, 2005 *et al.*). Process Maps are established tools to analyse, communicate, and manage real business processes, or to implement a new process structure to renovate the business process (Hunt, 1998). Process mapping mostly addresses two goals: 1) it supports business workers' understanding, communication and business process improvement; and, 2) it can be used to explain the need for conceptual modelling of business processes. According to Aguilar-Savén (2004, p.129). "*The conceptual modelling of business process is deployed on a large scale to facilitate the development of software that supports the business processes and to permit the analysis and re-engineering or improvement of them*". In this research, process mapping or BPM is used to understand the current business travel process in case study organisations. The selected BPM method that is used in this research is known as IDEF0 (Methodology Chapter Three, Section 3.5.5 detailed the reason for selecting IDEF0 and other BPMs).

To develop BPM diagrams, the IDEF0 models have been used to identify: how the business organisation manages its travel process currently, how they are managed and the barriers which can occur. These processes include both automated system components (e.g. software), and non-automated objects (e.g. people). The models are decomposed: [an IDEF0 model is made up of several diagrams. Each diagram describes in more detail a box from a more general diagram. The process of describing a box in more detail is known as decomposing a function (Paulus *et al.*, 2005)]. According to Kim and Jang (2002, p 121) "*A strategy for organising the development of IDEF0 models is the notion of the hierarchical decomposition of activities. A box in an IDEF0 model, after all, represents the boundaries drawn around some activity. Inside the box is the breakdown of that activity into smaller activities, which together comprise the box at a higher level. This hierarchical structure helps the practitioner to keep the scope of the model within the boundaries represented by the decomposition of the*

activity. This organisational strategy is also useful for hiding the unnecessary complexity from view until a more in-depth understanding is required".

In this case study, the models are decomposed into three levels. Here, it shows the partitioning of the modelled function into its component functions. The term 'Node A' is a parent box from which child boxes originate. These levels are:

- Node A0: This is the context diagram which presents the top-level activities of current business travel process in an organisation;
- Node A1: This diagram represents the current management process of business travel from the starting point to the Implementation level;
- Node A11: This diagram represents the establishment of travel need;
- Node A21a: This diagram proposes the booking process by the TMCs; and
- Node A21b: This diagram describes the travel booking process online.
- Node A31: This diagram represents the process of undertaking business travel after booking.

The more general diagram is called the parent of the detailed diagram. IDEF models are read in a Top-Down fashion. The top level diagram, also called the Context or A-0 Diagram, summarises the overall function of the system which is represented by a single box. The A0 diagram represents the first decomposition of the system. The A0 and all subsequent diagrams must contain 3 to 6 numbered boxes (Paulus *et al.*, 2005).

Each of these nodes is described in detail below.

Node A0 (Managing Business Travel Process)

Node A0 (Figure 6.5) represents the top-level activities that give a basic overview of managing the business travel process.

In this process, the organisation works with inputs such as business trip data (e.g. why the business travel is undertaken, purchase requisition data), e.g. business travellers identify the flights, hotels and then the requisition form is completed.

The organisations carry out these inputs/activities within set controls such as project time lines, company guidelines, industry standards and business travel policy objectives.

The organisations are assisted in the business travel process by mechanisms, such as online booking tools, TMCs, business travel administrators, line managers, finance departments and also the travellers themselves.

The aim of this process is to deliver project outputs which may include 'items' such as project documents or reimbursed expenses, as well as less tangible things like fulfilled business goals or future opportunities.

IDEF0 Notation

Control

Activity Process

Input → Output

Mechanism

The IDEF0 notation consists of ICOM (Input, Control, Output, Mechanism) these four categories.
Input: Transformed by activity or process.
Control: Dictate and constrain under what conditions transformations occur.
Output: Created as a result of activity transformations.
Mechanism: Describe how the activity is to be carried out (resource, process etc.)

Time Line

Business Relationship

Business Travel Policy Objectives

Budget

Business Trip Data → Manage Business Travel

Purchase Requisition Data →

0

A0

Future Opportunities

Travel Plan

Fulfil business goal

Reimbursed expenses

Online Booking Tools

Business Travel Agent

Finance Manager's Approval

Business Travel Administrators

| NODE: | A0 | TITLE: | Managing Business Travel Process | NO.: | 0 |

Figure 6.5 Strategic and Implementation Level Activities for Managing the Business Travel Process (Ruikar *et al.*, 2003).

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Node A1 (Managing Business Travel Process)

Node A1 (Figure 6.6) represents the process of business travel management for Case Study One where the organisation booked travel both by TMC and individual traveller booking. Recently the organisation eliminated the individual booking process and all travel is now booked via TMC. This is a hierarchical process of the total business travel management system by the organisation.

The process involves inputs, outputs, controls and mechanisms for the different levels of the business travel management process. In general, this means that establishing travel needs, booking travel, undertaking travel, and settling travel expenses are the main processes. These processes are interlinked and IDEF0 diagrams endeavour to represent the relationship between each activity and the overall information in the system.

Before undertaking any business travel, the organisation establishes the need for travel, and then makes the decision to travel with the approval of the head of department. This system is controlled by the organisation policy, time and budget. With the approval of the document and the trip approved the traveller goes to book travel. The activity of booking travel could be done in two ways: one is to book through the TMC, and the second is to book directly, online and through the tactical administrator. In the booking process, the input is the trip request and the output is the travel documents, e.g. tickets, reservations. In this stage, controls can be found with the finance department which suggests the approved TMCs who also ensure that the total booking process is undertaken through the university regulations. If the traveller found the rate of TMC is higher than Expedia or online offers then the traveller disagrees to book tickets via the TMCs and in that the case tactical administrator had to contact the finance department and ask permission to book the ticket online.

It can be seen from Figure 6.6 that the booking system in 2010 did not occur in a controlled environment; here the travellers had the choice of booking online. If the travel is booked via traveller without help of TMCs, the organisation faces difficulties tracking carbon emissions and cost of travel.

Currently tickets and hotel fares of all travel booked via TMCs has been booked and claimed by TMCs so travellers need to claim only a few things after undertaking the travel, such as: food or beverages, and/or transport used without booking by TMCs. Case Study One results

suggest that the strategic level selects the approved TMCs. However, at the Implementation level, it was found to be easier via internet, using online offers, such as Expedia. There is a flaw in the system as there is a question to be asked. Which system is better for the organisation, and can be flexible for each level? To understand this, the entire booking system has been observed in detail. The complexities of the booking system are shown in the following two diagrams, which are 'child' diagrams of Node A1 (parent) labelled Node A11 and Node A12a , A21b.

Node A11 (Establish Travel Need)

Node A11 (child diagram of node A1) represents the process of establishing the travel need. Evidence from the case study shows that the current process does not give efficiency or flexibility to users and that there are barriers to overcome. For efficient business travel, a good plan prior to travel is important. Before taking the decision for face-to-face travel, it is necessary to check the possibilities of replacing the travel with virtual meetings. The IDEF0 diagram (Figure 6.7) suggests that the decision making process for this organisation is a two-step process. There is no official formality for taking business travel decisions, nor for a travel proposal to mention why the travel is necessary and whether the travel could be done by a virtual mode or not. Virtual meetings are important and the organisation's policy supports that, yet the documentary analysis suggested that there is no method of selecting either virtual/or face-to-face meetings.
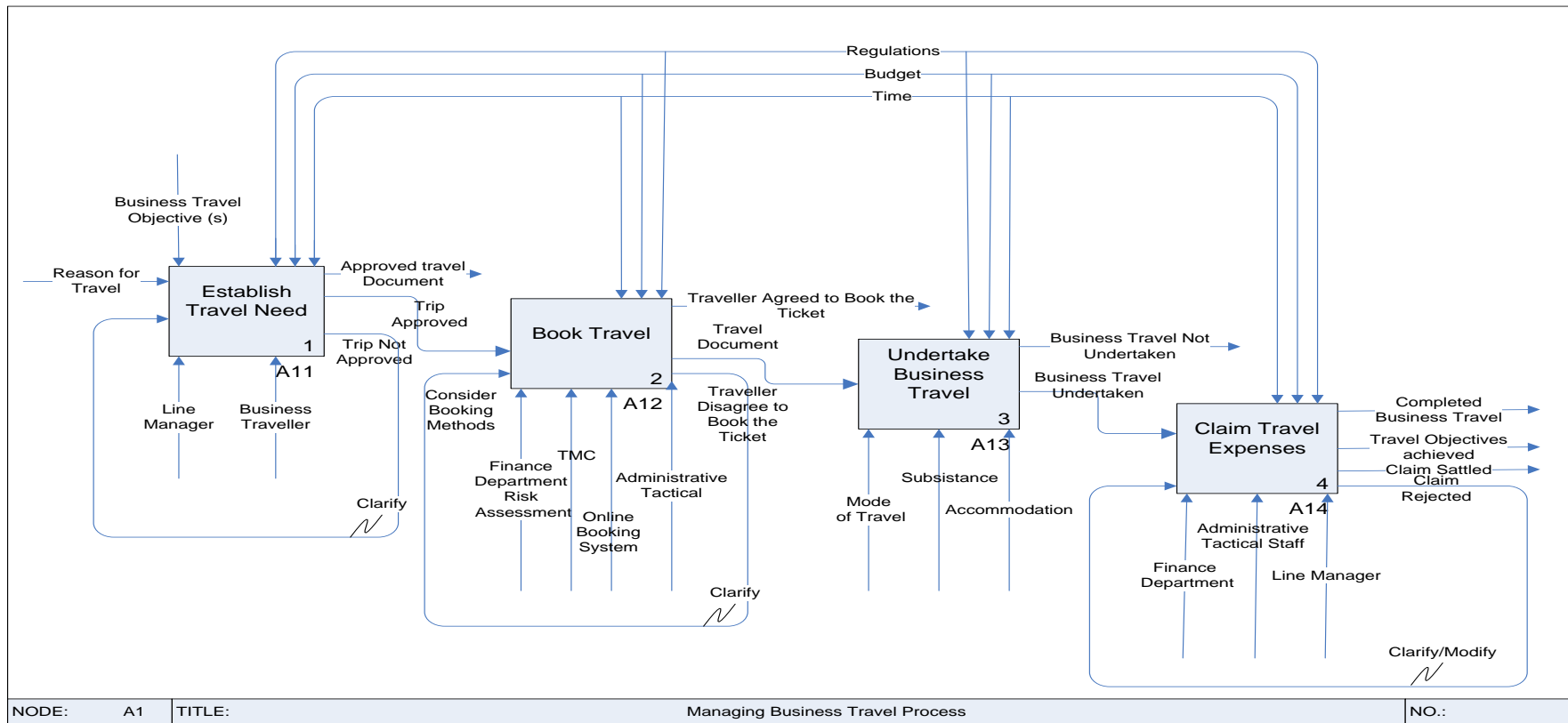
Figure 6.6 Managing Business Travel Process (Strategic and Implementation Levels).

NODE: A11   **TITLE:** Establish Travel Need   **NO.:**
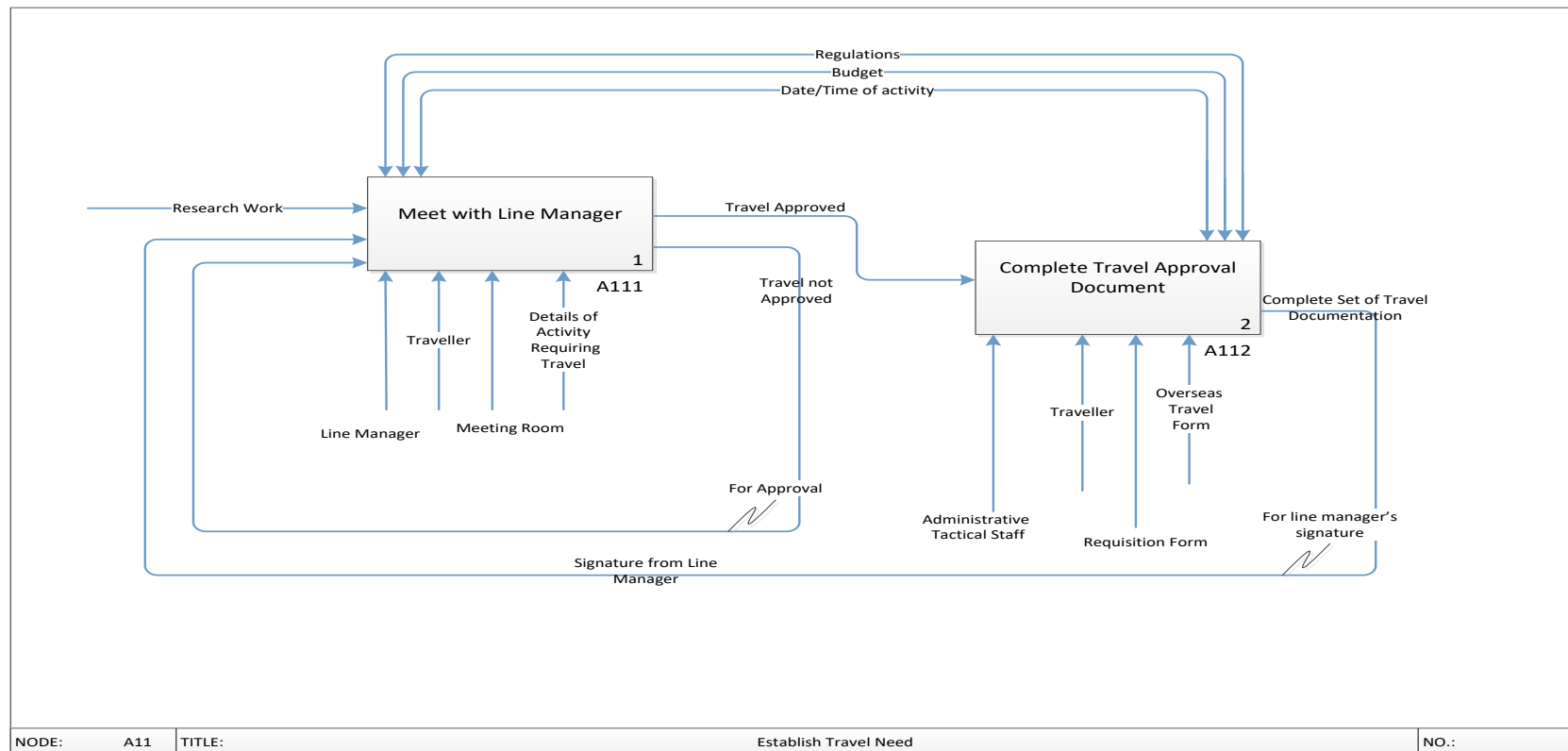
Figure 6.7 Establish Travel Need (Implementation Level).

After the approval of the line manager, the traveller has to book their tickets. There are two ways to book travel. To show the detail and difference between the two different booking processes (book by TMCs and online booking) A121a and A121b two sub-diagrams are presented below.

Node A21a (Travel Booking by TMCs)

This process diagram (Figure 6.8) illustrates the business travel booking system through the organisation approved TMC. First, the traveller needs to contact a tactical administrator to book his/her tickets. The tactical administrator then contacts the TMCs. The advantage of using a TMC is that if the booking has to be cancelled then TMCs will give a full refund. In that case, the traveller needs to go back to line managers, the tactical administrators and the TMC who could give a full refund if the ticket is booked by them. The case study suggested that both the policy makers and the strategic administrators encourage travellers and the tactical administrators to book travel through the TMCs in order to save time and money. However, some travellers and tactical administrators think that saving time and money is not always possible when using TMCs. Sometimes it can be cheaper to book travel by directly using internet. The IDEF0 diagram shows that in order to keep records of the bookings, TMCs contact the tactical administrators, who then keep records in a system named 'Agresso.'

Node A21b (Individual Booking)

This process (Figure 6.9) is similar to A121a, however, the booking process is done by the departmental administration. Often this process could be done by the travellers themselves; however the organisation encourages users to book their travel via their allocated administrator. This way, the organisation could pay the maximum amount of money the traveller requires, plus the traveller does not need to go through the reclaiming process, except for subsistence and transport after undertaking business travel to the meeting place. During an *impact review* process, the policy maker mentioned that the organisation will have a strong policy in future where travellers can only book their travel through TMCs (Figure 6.8), even though the travellers mostly prefer to book their own travel. A detailed reason has been discussed during the barriers section of this chapter (Section 6.3.2). The IDEF0 diagram (Figure 6.9)

shows that while online booking, the traveller has to locate the tactical administrator and that the tactical administrator must complete the rest of the booking process. If there are too many travellers and too few tactical administrators the travel can be compromised. A system which the traveller could use directly would potentially be easier. The system would have to be robust enough to maintain all the records of the booking process. However, refunds from travel agencies are not possible using the online booking system.

Node A3 (Undertaking Business Travel)

In this organisation, travellers use three types of modes to travel: air, rail and car. Figure 6.10 represents the travel by car, air and rail. The figure shows that travellers often face problems such as delays or cancellations. Empirical data in this research also shows that using TMCs can save cancellation or delay charges as the TMCs refund the money [E-SA2].
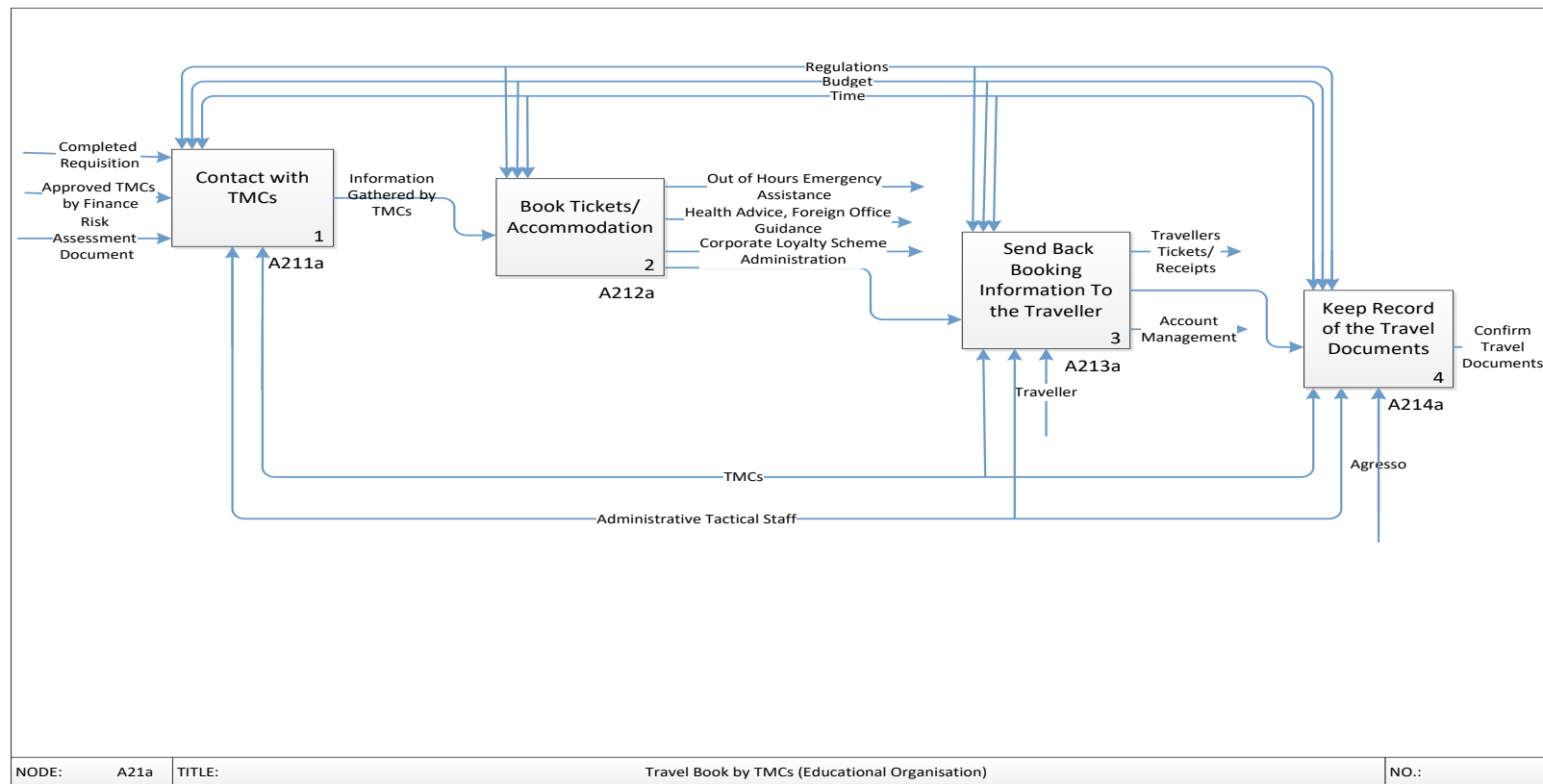
Figure 6.8 Current Travel Booking Systems by TMC (Implementation Level).

The diagram contains the following elements:

Box 1: Contact with TMCs — A211a
Box 2: Book Tickets/Accommodation — A212a
Box 3: Send Back Booking Information To the Traveller — A213a
Box 4: Keep Record of the Travel Documents — A214a

Inputs to Box 1:
- Completed Requisition
- Approved TMCs by Finance
- Risk Assessment Document

Top controls: Regulations, Budget, Time

Box 1 output: Information Gathered by TMCs

Box 2 outputs:
- Out of Hours Emergency Assistance
- Health Advice, Foreign Office Guidance
- Corporate Loyalty Scheme Administration

Box 3 outputs:
- Travellers Tickets/Receipts
- Account Management

Box 4 output: Confirm Travel Documents

Mechanisms: TMCs, Administrative Tactical Staff, Traveller, Agresso

NODE: A21a   TITLE: Travel Book by TMCs (Educational Organisation)   NO.:

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Figure 6.9 Previous Individual Booking Systems (Implementation Level).

| NODE: | A3 | TITLE: | Undertake Business Travel (Educational Organisation) | NO.: |
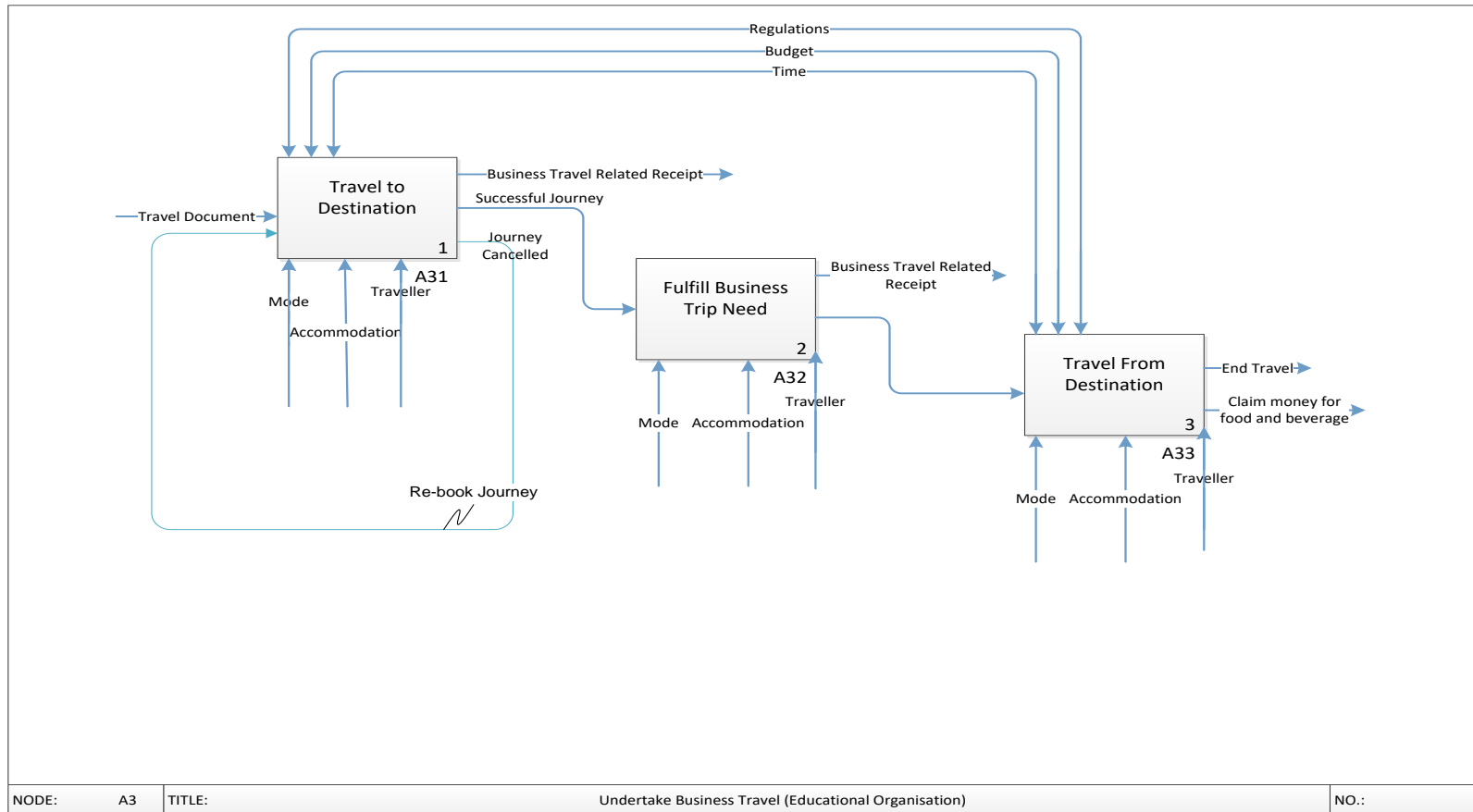
Figure 6.10 Undertake Travel (Implementation Level).

The IDEF0 diagrams outline the detailed process of business travel management processes graphically. These diagrams will be compared with the Case Study Two results in order to identify the advantages and disadvantages of both management processes (Chapter Six). Finally, a set of IDEF0 diagrams will be developed that revises the method of business travel process management (see Framework Chapter, Chapter Eight for more detail).

6.5 ANALYSIS OF CASE STUDY ONE

This case study has analysed the different viewpoints of policy makers, strategic administrators, tactical administrators and some travellers. The viewpoints of the different roles highlight that there is a gap between the policy maker, strategic administrative tactical administrator, and users. The policy drive is to encourage travellers to book travel (100%) via TMCs, however the tactical administrators and travellers would like to have both options available in booking via TMCs and self-booking to deal with urgent travel booking or in pursuit of cheaper deals via alternative online booking options. The view points of the interviewees has been analysed by compared with the literature. This section also provide the strength and weakness of Case Study One organisation.

6.5.1. Viewpoints of the Strategic and Implementation Levels

Viewpoints differ regarding employees' influences on business travel. According to all interviews, the mobility of employees, the hierarchical position of employee and income influences business travel, however policy makers and strategic administrators suggest that gender does not make any difference. It is noticeable that one traveller in this organisation suggests that gender also influences business travel; other travellers and tactical administrators are however unsure about the influence of gender. Literature suggests women are more likely to avoid international business trips because of less security (Swarbrooke and Horner, 2001; Aguilera, 2008; Chee Hoa and Siew Har, 2014). However, according to the policy maker and strategic administrators in this organisation if travel is necessary academics from both genders undertake equal travel.

Figure 6.10 (a-f) shows the viewpoints of policy maker, strategic administrators, tactical administrators and travellers and the lessons learnt from their viewpoints.

Strategic Level

Policy Maker's Viewpoint

For the long run TMCs are helpful because when the organisation uses TMCs more and more the TMC can provide lots of offers, deals to save money and effective services. If the organization members do not use TMC then these benefits will not materialise.

Strategic Administrator's Viewpoint

TMCs are expensive at present as not many travellers are using it. If more travellers booked travel through TMCs then the TMCs could give the organisation a better offer in the future.

Implementation Level

Tactical Administrator's Viewpoint

Main priority of booking a ticket is to get a cheaper ticket, whether it is from the TMC or a personal search from the internet.

Traveller's Viewpoint

Online booking gives cheaper tickets and it is also often a quicker and more flexible process.

Lesson learnt: Travellers are not aware of the organisation's benefits for long run by using TMCs. Need to improve communication in between strategic level and travellers.

Figure 6.10.a Travellers are not aware of the organisation's benefits for long run by using TMCs.

Strategic Level

Policy Maker's Viewpoint

Needs a strong governmental policy as an external factor to help deliver cost savings. The reason is when the policy comes as governmental legislation then everyone follows the policy.

Strategic Administrator's Viewpoint

Business travel for this organisation is governed by auditors, restrictions and budget controls. Internal factors that influence business travel include insurance. Cost will always be the main issue to control.

Implementation Level

Tactical Administrator's Viewpoint

Tis organization does not have enough money to spend, so the organisation needs to be careful who uses the money and how. Government help is very important such as helping the students/employee by funding. Government often takes the money away from the university and makes the students

Traveller's Viewpoint

Using the TMC is expensive and the organization is wasting money by following this approach.

Lesson learnt: Cost is an important issue and government can help to control it.

Figure 6.10.b Cost is an important issue and government can help to control it.

Strategic Level

Implementation Level

Policy Maker's Viewpoint

For a senior employee it is very time consuming to look for a cheaper flight before s/he books travel. That is why complete self-booking tools for the booking process is not appropriate.

Strategic Administrator's Viewpoint

According to one strategic administrator, the ideal business travel booking process is that which can fully complete at the school level and no involvence needed from central level. This can help to avoid delays for travellers. Also last minute booking has to be eliminated. Delays in the booking happen if the traveller inform at short notice.

Tactical Administrator's Viewpoint

According to the tactical administrator, the main objective of the business travel process is to get somebody from place A to place B in 'the shortest space of time'.

Traveller's Viewpoint

According to one user, the dynamic revenue management system of this organisation has too many steps to book the business travel.

Lesson learnt: Time efficiency is an important issue and individual-booking tools takes longer time to book travel

Figure 6.10.c Time efficiency is an important issue and individual-booking tools takes longer time to book travel.

Strategic Level

Implementation Level

Policy Maker's Viewpoint

Government has given new policy (Scope 3) for the organization to maintain carbon footprint records. If the organization does not use TMC it will be difficult to report the carbon emission.

Strategic Administrator's Viewpoint

The strategic administrator agrees with the policy makers and tries to comply with the policy.

Tactical Administrator's Viewpoint

Some tactical administrators are not aware of the change and prefer making individual bookings. However some tactical administrators are aware to book travel with TMCs.

Traveller's Viewpoint

Travellers are not aware of the scope 3 implications and often prefer individual booking rather than TMC booking.

Lesson learnt: Measuring the carbon footprint is a challenge

Figure 6.10.d Measuring the carbon footprint is a challenge

Strategic Level

Implementation Level

Policy Maker's Viewpoint

Implementation level staff (tactical administrators, travellers) take time to adopt a new policy. So supporting the behavioural changes of the staff is essential.

Strategic Administrator's Viewpoint

Same as policy makers strategic administrators also mentioned, supporting the behavioural changes of the staff is essential.

Tactical Administrator's Viewpoint

Prefers changes that give tactical administrators flexibility to book travel effectively (cost and time effective).

Traveller's Viewpoint

Prefers changes that give travellers the option to book travel effectively (cost, flexibility and time efficient).

Lesson learnt: The organisation needs to focus in implementation level staff behaviorual change

Figure 6.10.e. The organisation needs to focus in implementation level staff behaviorual change

Implementation Level

Policy Maker's Viewpoint

In future, the organisation will provide improved technological support such as video conferencing tools, conference rooms.

Strategic Administrator's Viewpoint

Mentions that this organisation has lack of technical support.

Tactical Administrator's Viewpoint

Tactical administrators pointed out that the IT department also needed to be involved to train people

Traveller's Viewpoint

Same view point as strategic level (policy maker and strategic administrator).

Lesson learnt: Organisation needs to provide improved technological support

Figure 6.10.f. Organisation needs to provide improved technological support

Figure 6.10.a. shows that travellers are not aware of organisations' long-term benefits of using TMCs. By using TMCs, organisations can save on the cost of travel in the case of booking cancellation as TMCs give a full refund; also TMCs can offer more to the Case Study One organisation if a large amount of travel is booked via them. According to Siebenaler and Groves (2008) the TMC industry depends upon commissions for a majority of its revenue. When the commissions from the airline or rail companies decrease or stop, the TMCs have to change the means by which revenue is made. So more the travel is undertaken by the TMCs, and it is better for the TMCs and as well as the business organisations who are using TMCs to get discounted tickets.

It has found from the Figure 6.10.b, the case study organisation is currently changing the travel booking system to save cost. However the organisation finds it challenging. Service purchasing is a constant process involving individuals at different organisational levels in buyer and supplier firms (Wang and Davis, 2008). According to Holma (2012), "*Purchasing services is generally viewed as more challenging than purchasing goods*". The organisation needs to focus on two actors before service purchasing, the professional service provider (since service provision is increasingly outsourced) and the business relationships researched from a dynamic perspective (Holma, 2012). The organisation can save cost by changing booking processes, however the process needs to be suitable for the organisation's business relationship with internal and external stakeholders including TMCs. Case Study One findings revealed government can help the organisation to save on the cost of travel. It has found in the literature governments must develop, manage and maintain long-term strategic partnerships with preferred suppliers (Roby, 2014). Also governments can free up funds and resources while improving the effectiveness of organisations' IT departments. Better processes and new technologies can help governments boost their revenue stream (Roby, 2014). So the government has a vital role to control the travel costs of organisations.

Figure 6.10.c highlights, that individual booking by travellers themselves is time consuming and booking travel via TMCs can help to save time for travellers in the Case Study One organisation. It has been found in the literature that online customers are affected by perceptions of service quality (Sultan and Mooraj, 2001), price: cost and time (Mitra, Mitra, and Pal, 2001), and risk (Koufaris, 2002).

Figure 6.10.d is regarding reducing carbon emission. The Case Study One educational organisation finds it challenging to comply with the Scope 3 policy applied by the

government. This organisation is using TMCs to help to report carbon emission, whereas without a TMC, the organisation needs to count the mileage of all travel which is time consuming. According to the policy maker the organisation needs to take the reporting of carbon emission as compulsory and they were looking to take the initiative. Davies and Armsworth (2010) mentioned, "*Companies more broadly are going beyond compliance to mitigate their environmental impact by managing travel-related emissions voluntarily. Although many corporations are measuring and reporting emissions, only a limited number are willing to implement in-house reduction policies prior to regulation*".

Figure 6.10.e shows, the organisation needs to focus on implementation level staff's behavioural change to adopt the new system. Hax (2005) suggests that understanding of the backgrounds of customer online buying decisions is difficult. So organisation need to see the staff's adaptability of any changes in to the system.

Figure 6.10.f reveals this case study organisation aims to provide more resources of new technologies to undertake virtual travel. According to Denstadil *et al*, (2013), "*important features of modern business practice are project organisation and collaboration and processing and annotating of digital material and content. ... This has now evolved even further with the integration of web conferences, project cooperation tools, chat, access to archived work material, databases, and so on*." With the help of new technologies this case study organisation can successfully undertake virtual meetings and can replace face-to-face meetings with virtual travel.

Strength and Weakness of Case Study One

From the case study findings and analysis the strengths and weakness of Case Study One organisation has identified and described below:

Strengths of Case Study One:

From the case study findings and analysis it has found the organisation has some strengths that helps to manage and perform business travel effectively, these are:

- The organisation has a sustainable policy for business travel e.g. car share schemes, using public transport and establishing the rules of Scope 3.
- The organisation uses TMC (not named to maintain anonymity) that will offer a full refund if any traveller cancels their booking and 24hour service.
- The organisation is focused on a cost effective business travel management process.

Weaknesses of the Current Processes in Case Study One

From the case study findings and analysis it has found the organisation has some weakness that do not support the organisation to manage and perform business travel effectively

- The reason for not achieving the objective of booking all travel through TMCs is that travellers may need emergency travel or last minute booking when the tactical administrators are not available to book the travel through TMCs. It is also often costly for travellers. The organisation has no quicker process to book travel as well as use TMCs at the same time;

- The organisation does not allow travellers to use business class air travel, however it is difficult to travel more than 8 hours by economy class if the traveller has to attend a business meeting next day;

- Extensive checklists to document travellers' duty of care when international travel is booked individually and no 24 hour duty of care, like TMCs, when travellers book tickets online;

- Not all travellers and tactical administrators were aware of this risk assessment of travellers' safety and often travel without risk assessment documented;

- Lack of communication between Strategic level and Implementation level. There are many things in the new system of which travellers are not aware, for example, the organisation approved TMCs charge an additional £1 for each ticket they book;

- The travel management team found it too difficult to report carbon emissions per year and total business travel undertaken each year because of a complicated system; and

- The complex business travel booking process was found to be a major problem. Whether the business travel will be booked online or by the TMCs is still an issue for the Implementation level. On the other hand, in Case Study One, Strategic level strictly wants to use TMCs as it is better in the longer term.

To fill these gaps the organisation may require an improved system that will not only focus on changing the travel booking process, or holistically review the policy regarding travellers' issues such as: last minute bookings, shortages of admin staff, or control the behaviour of travellers' to adjust with any new policy by monitoring/evaluating the processes. The organisation can establish a system where travellers can book travel direct with TMCs without the help of admin staff; also proper training and communication in between travellers and strategic administrator can help travellers to adopt the new system.

6.6 SUMMARY

Consequently, the aim of the case study was to provide an explicit representation of the business travel processes within the Case Study One organisation and to identify the activities undertaken and the controls that govern the activity. The literature review suggests that organisations tend to manage their business travel in several ways (Holma, 2012; Gustafson, 2012; Morrison *et al.,* 1994). This case study revealed the in-depth scenario of business travel process management of one large educational organisation in UK.

After observing the current booking processes in this organisation it can be concluded that using TMCs is acceptable as long they offer a cheaper rate and some flexibility. In addition, it is important for the users to receive a quicker service. It should be noted that depending on the School Tactical Administrators, there are often time losses, particularly when the tactical administrators are absent or unavailable. In such situations another group could provide support for the service in order to maintain efficiency.

CHAPTER SEVEN

CASE STUDY TWO

7.1 INTRODUCTION

This chapter focuses on introducing the key findings and analysis of Case Study Two. The methodology chapter (Chapter Three) has given a brief introduction to the case studies which introduces the aim and objectives, the adopted methods, and the rationale for selecting the case study organisations. In this chapter, Section 7.2 provides background information about the selected organisation; Section 7.3 presents the key findings of Case Study Two in terms of improving business travel process management within the organisation. Section 7.4 provides BPM for business travel process management of Case Study Two organisation; Section 7.5 presents the analysis of Case Study Two findings; Section 7.4 gives a brief summary.

7.2 BACKGROUND OF CASE STUDY TWO ORGANISATION

This section provides background information about the Case Study Two organisation. A manufacturing multinational company with 40,000 employees across the world has been selected as a second case study organisation (reasons for selecting Case Study Two organisation were discussed in section 3.5.4, Chapter Three). From the *initial review* (documentary analysis) process it has found that this organisation has a presence in 48 countries all over the world, with the headquarters based in the United Kingdom. Large manufacturing plants are also located in America, Singapore and China.

The company has placed a strong emphasis on global expansion in recent years, and it expects to double its size in the next ten years (Robertson and Rose, 2012). This move towards growth has placed it in good state for the future, enabling it to access many of the world's biggest growth markets. It also benefits from its continued investment in research and development on which it has spent more than £3.5billion in the past five years, a policy which has also helped it to comply with increasingly strict environmental regulations (Rishton, 2012). A key issue for the industry as a whole, this has helped strengthen its range of products, services and capabilities.

Business travel is very important for this organisation and a large amount of travel is carried out each year. The *impact review* (interview) process it has found that, in the year 2010 the

amount spent on business travel was approximately £100 million. Table 7.1 gives background data of the Case Study Two organisation.

Table 7.1 Background of Case Study Two Organisation

Number of Employees	Turnover (£)	Spend on Business Travel (2010) (£)	Organisation Sector
40,000 (Global)	£8,000,000,000	£100,000,000	Manufacturer

To understand how business travel is carried out in this organisation a documentary analysis and seven interviews were undertaken. The names of the interviewees have been kept anonymous in this research to maintain confidentiality. Table 7.2 gives an overview of the staff roles interviewed in this case study organisation. Here, 'M' stands for 'manufacturing organisation', 'PM' stands for 'policy maker', 'SA' for 'strategic administrator', 'TA' for 'tactical administrator', 'EU' for 'experienced user'; and 'NU' for 'new user'.

Table 7.2 Background of Staff Interviewed in Case Study Two Organisation

Job Title and Interview Indicator
Director or policy maker   **M-PM1** (travel buyer, purchasing)
Strategic administrator   **M-SA1** (pay roll and expenses)   **M-SA2** (business improvement leader)   **M-SA3** (human resources manager)
Tactical administrators   **M-TA1** (quality and business improvement)
Experienced user   **M-EU1** (quality and business improvement)   **M-EU2** (strategic marketing and business development manager)   New User **M-NU1** (business improvement leader)

7.3 KEY FINDINGS OF CASE STUDY TWO ORGANISATION

7.3.1 Currently Available Policies for Managing Business Travel

The in-depth interviews conducted in the *impact review* process revealed that this manufacturing organisation has a Global Travel Strategy which was developed by the Global Travel Advisory Group (GTAG) [M-PM1]. According to the policy maker [M-PM1], GTAG consisted of a core team made up of representatives from a range of key functions, and was formed in January 2011. Previously the business travel policy was written by a team from human resource (HR), purchasing and finance. Currently the policy is owned by HR and has been developed by HR and purchasing on the basis of previous events, duty of care requirements, legislation and on the grounds of affordability. The finance department is responsible for the expenses processing in the system but it does not fulfil any policy development role M- SA1 mentioned, *"it is done in accordance with HR. We would not just do something. We would get a guidance or agreement from HR. It is not just one area. Everybody looks at this policy. It's been in all areas with agreement from HR, Finance and from Purchasing"*.

The directors of the finance, information technology (IT), HR corporate groups are responsible for the travel, entertainment and meeting (TEM) policy and guidelines document. Control, review and /or changes to the policy and guidelines can only occur by the agreement of the TEM Committee, which meets at least annually or as necessary [M-PM1].

From the *initial review* the main objectives of the business travel policy of this organisation, (Travel and Expenses Policy, 2014) were to:
- define policies, guidelines, roles and responsibilities relating to business travel;
- assist in meeting taxation and legal requirements associated with addressing business travel and other expenses;
- communicate required authorisation, payment methods and expense processes;
- ensure consistency in travel and entertainment guidelines across UK businesses, adopting best practice generally across the organisation; and to
- establish controls and effective reporting to enable successful management of travel, entertainment, meeting/event related costs and other expenses.

One important part of the policy is that this manufacturing organisation encourages video conferencing. The policy identified video, web and teleconferencing to be a cost effective

alternative to travelling in person and the policy notes that it should be used wherever reasonably available and practicable. Also, a role is assigned for the purpose of virtual meetings by the organisation, as the policy mentioned traveller may contact the IT recourse person for information on the use of virtual meetings technologies. UK travel policy applies to the employee of this multinational organisation for business trips of less than 28 days. All trips that are more than 28 days are in conjunction with the global travel policy. The head of global finance service centres is responsible for the travel, entertainment and meeting policy guidelines document. The travellers need to comply with the policy that is available on the compliance section of this organisation's intranet site (which is only accessible by the organisation's employee). This manufacturing organisation has relationships with external companies who provide country specific information for employees going on business trips. The country profiles are provided by a reputable independent organisation and are regularly updated (Travel and Expenses Policy, 2008, 2014).

The responsibilities of the management team and the travellers as set out in the policy are described below:

Table 7.3 The Responsibilities of the Management Team and the Travellers (Travel and Expenses Policy, 2014)

Manager's Responsibilities	Traveller's Responsibilities
- Setting up the initial travel; needs travel budget and travel plans to meet business objectives; - Maintaining a climate that supports appropriate travel costs to meet business objectives; - Ensuring that the employees are fully informed of the organisational travel policy, pre-trip approval and expenses claiming processes, including the requirement of have an up-to-date certificate of fitness to travel overseas; - Where appropriate, carrying out risk assessments, providing destination contact numbers and job requirement details; - Approving travel requests; - Reviewing expense claims for proper substantiation of expenses; - Ensuring that expense claims are reasonable and appropriate, and approving them in a timely manner; and - Making sure that any instances of non-compliance with this policy or business unit procedures are dealt with by the employee's immediate manager which in appropriate cases may result in disciplinary action.	-The content of their claim irrespective of whether they or a third party input the data; - Raising any questions as to whether a potential business travel cost is appropriate with management prior to incurring any expense; - Understanding and following UK travel policies and any local business unit procedures; - Immediately advising management if they are not in good health and fit for business travel; - Maintaining for travel outside of western Europe, an up-to date certificate of fitness to travel overseas issued by the occupational health department; - Obtaining correct pre-trip approval for non-domestic business travel. - Using preferred travel suppliers as determined by the organisation's designated TMC (travel management company); - Consulting and fully complying with travel security bulletins and destination information; - Ensuring they have valid passports and necessary visas/ entry documents when travelling to another country; - Promptly completing and submitting expense claims with the required receipts. Expense claims not submitted within three months of completion of the business trip will not be reimbursed; - Maintaining an appropriate level of personal insurance to cover any personal belongings that are not directly relevant to business purposes that may be taken on a business trip and which may not be covered by the organisation insurance; - Hire cars or pool cars should normally be used but when privately owned vehicles are used for any business, it is the responsibility of the owner to have a valid driver's license, adequate liability and physical damage insurance for using the vehicle for business purposes and for ensuring that the vehicle is in a roadworthy condition; and -If a traveller takes a long-haul flight or a short-haul, overnight flight then the traveller must not drive until they have had at least six hours rest.

From the *initial review* it was found that the traveller needs authorisation from a line manager. In the case of non-domestic travel, an appropriate trip request should be authorised before travel is booked. Formal authorisation will be required prior to payment of incurred expenses (Travel and Expenses Policy for UK Business, 2008 and 2014). It is clearly said in

the policy document that the organisation will reimburse employees in a timely manner for authorised travel and business entertainment expenses incurred whilst undertaking their duties of this manufacturing organisation. An appropriate trip request and expense claim, supported by appropriate receipts correctly completed and submitted by employees is required for reimbursement.

The policy also mentions anyone travelling for the company on long-haul or international flights (between Asia, Africa, North America, South America, Europe and Australia) of eight hours or more shall travel business class. All flights less than eight hours should be in economy, except where the flight is overnight and the traveller is required to report for work on the day of arrival; in these circumstances business class may be used. Any other dispensation to travel business class on flights of less than seven hours requires the approval of the managing director of the employee's business unit (Travel and Expenses Policy for UK Business, 2008 and 2014).

While undertaking the *impact review* process, it was found that all users are made aware of this policy and that details of the policy are highlighted on the manufacturing organisation's HR online website at the point where the traveller is filling in the trip request form in the SAP system (systems application programme). Use of TMC may often cost more money than booking the travel via Expedia, however, according to M-SA1, this organisation gives priority to achieving value for money and this value is not only saving costs but also the quality. So travel booked by TMC is safer for the traveller, the service is 24 hours and this security is important for this organisation.

7.3.2 Context of Current Process Related Information

The documentary analysis or the *impact review* process for this case study revealed that it uses a hierarchical management structure. This is managed by detailed systems and procedures due to the organisation's large turnover (£8 billion). There are many layers between the top and bottom groups. The top layer creates the policy and decision making processes, which is a traditional structure devised to supervise and develop the organisation. The lower layers follow the guidelines so that they can achieve the company objectives. The group structure is: chairman, board of directors, group of executives, board of management and group of general management. The key departments within the group are: administration, business, customer support, network development, production services, finance and human

resources. Each division employs managers to supervise the business travel within the organisation. The staff in each division are directly managed by line managers.

From the *impact review* process it was found that this organisation does not have a business travel management process that it can use worldwide. Rather, subsidiaries in different countries use different business travel management processes. According to policy maker M-PM1 and strategic administrator M-SA1 each subsidiary has a corporate travel policy in which the designated TMC manages travel on the organisation's behalf and employees conform to this. However, it is the case that processes in most of the countries are similar to UK management [M-PM1]. This section will describe the management process of Case Study Two UK organisation.

Figure 7.1 presents the link in between business travel process- related bodies in the Case Study Two organisation. This figure helps to see the business travel process of the Case Study Two organisation from 'top down' approach to gain insight into the organisation's compositional sub-systems. Here the business travel process of the organisation has been divided into three stages: the strategic level, the implementation level, and interfaces. The description of three stages has been discussed below.
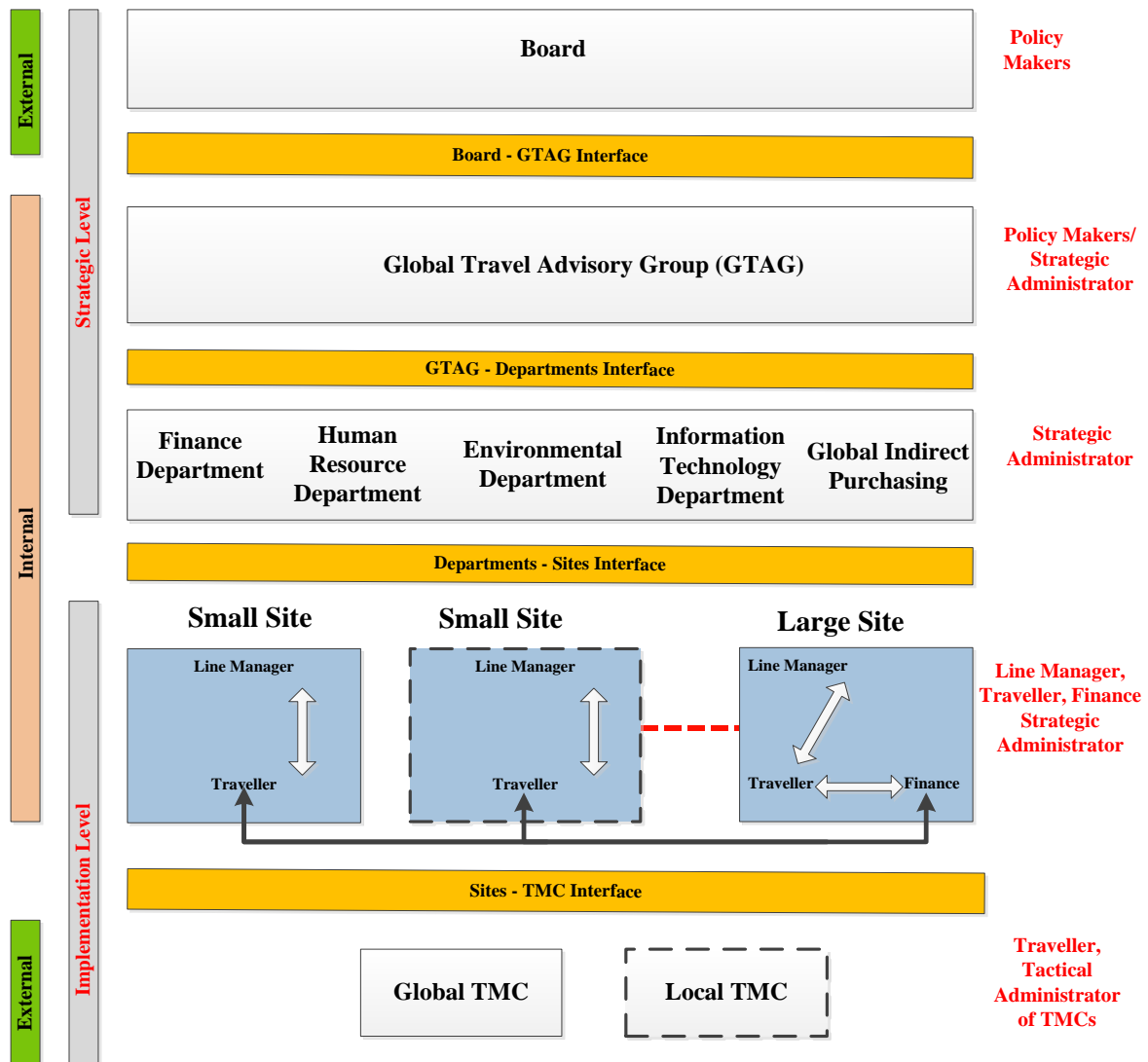
Figure 7.1 Case Study Two (Manufacturing Organisation) Business Travel Process Management Related Bodies.

Strategic Level

The strategic level comprises policy makers, strategic administrators who work at board level (external bodies), global travel advisory group (internal bodies) and organisational departments (internal bodies). At this stage the policy makers and the strategic administrators basically develop the organisational policies and alter the policies as needed.

Implementation Level

Implementation level consists of line managers, tactical administrators and travellers (who are all internal bodies) and one TMC (external body). At this stage the organisation applies the organisational policy to undertake business travel and complete the travel.

Interfaces

Top two interfaces are done by meetings, email, telephone, and agendas of meetings. The last two interfaces are done by SAP (Systems Application Programme) system, email, fax, and telephone.

Combined Process of Business Travel Management

For the organisation in the United Kingdom, three departments are related to managing business travel for this organisation. These three departments are related to the strategic level. First the global travel advisory group is involved in designing, managing and using the business travel process within the organisation. Second, global indirect purchasing is responsible for management booking experiences, e.g. airlines, car rentals, and hotels. However, the booking process is outsourced apart from authorisation and expenses claim, which is part of implementation level management. The third department is finance which is responsible for expense claims, credit cards, explanatory claims, and authorisation [M-SA1].

Three more departments are also related to business travel management processes of this multinational organisation: the IT department, environmental department and occupational health department.

- It has been mentioned in the previous section that the Travel and Expenses policy suggests that travellers can contact the IT department for knowledge about using virtual meetings.
- The environmental department keeps records of carbon calculations. M-PM1 mentioned that the organisation does not track carbon emissions as to do this accurately are fairly complex, e.g. depending on aircraft age, load factor. However, the organisation calculates the number of miles and uses an average indicator. 2010 data provided by M-PM1 shows that total hours for UK travel were 45,493 and globally 90,6229 (1 mile per hour =0.44704 m/s). By using a distance-based method, the organisation locates their carbon calculation. This part is divided into several

modes of transport. The organisation needs to use the number of miles travelled by the corresponding mode of transport to calculate the tons of carbon.

- For overseas travel (USA, Canada, Australia, New Zealand, Eastern Europe, Asia) travellers need to have an up-to-date 'certificate of fitness to travel overseas' issued by the occupational health department. The aim is to ensure that travellers receive recommended vaccinations and use appropriate protection against malaria and those health problems which may affect safety or require treatment in the field.

There are two managers who are responsible for managing the business travel globally for this organisation. One manager is based in the USA and another is based in the UK. The UK based manager also covers the Middle East and Asia. According to M-PM1, business travel is a large area of expenditure.

This organisation has one designated TMC. This TMC accordingly works for different branches in 18 countries of this multinational organisation. The global business travel data of 18 different countries are stored in a program by the TMC and this program effectively supplies the record for any traceability in terms of the expenses.

To book business travel individual travellers have to contact the TMCs. The travellers complete the SAP (systems application program) booking forms and provide the information to the TMC. In some small areas of the higher levels employers have personal assistants to deal with SAP forms and contact with TMCs. One experienced traveller [M-EU2] mentioned that people who do lot of travel have their own secretary.

The system has changed over the years. A few years ago there were tactical administrators who used to fill SAP forms for one department that has over 200 employees. The tactical administrator had to book travel with individual travellers to arrange their travel. This process was time consuming and this system changed in 2008. Currently, the traveller directly contacts the TMCs and once the travellers get flight and hotel details they (travellers) have to report back to the organisation. The approved TMC is aware of the terms and conditions of the travel policies of the organisation, like what airline class travellers are allowed to use, vehicle size specifications (Table 7.4).

Table 7.4: No. of Travellers/Distance Per Day/Car Group example for domestic travel

No. of Travellers	Distance per day	Car Group example
1-2	Up to 90 miles	CDMN (VW Golf)
1-2	Over 90 miles	CDMN (VW Golf)
3-4	Unlimited	IDMR (VW Passat)

TMC gives their best possible price to book flights, car, rail, hotels. So the traveller contacts the TMCs directly and does not use any tactical administrator in the middle; this also saves the traveller's time.

To explain more about the booking process E-PM1, ESA1, ESA2 mentioned this organisation has a custom made trip booker called SAP, which provides the user with a SAP trip number. A traveller has to input all the information about where to travel, the reason for it and the estimated cost in the SAP system. That work-flow within SAP then goes to their line manager, who then needs to approve it by authorising a trip number. For any domestic trips only the line manager needs to approve the trip request. However, for any non-domestic trips a senior manager/ director needs to give their approval. Once approved and on receiving the trip number, the traveller contacts the TMC via phone to book the travel. Applying via TMC enables the manufacturing organisation to accumulate travel supplier data for negotiating purposes. This helps effectively manage travel costs and tracks employee whereabouts in case of security incidents or emergencies. The TMC then can provide any emergency help the travellers may need.

Figures 7.2, 7.3 and 7.4 show examples of the SAP system that is used by members of the Case Study Two organisation. First, they present how to create a trip number in the SAP system. Before the traveller books any travel arrangements or claims any expenses they need to create a trip and trip number. Using the organisation's SAP system, screenshots of the system have been used (as explain in figures 7.2-7.4) to add more visual clarity.

Figure 7.2 shows how to start a trip request. Before the traveller books any travel arrangements or claims any expenses, they need to create a trip and trip number. The traveller needs to click on the day for which they want to book a trip or expenses. From the drop-down

list the traveller then needs to select 'travel expenses'. After entering this information travellers need to add trip details to generate a trip number.
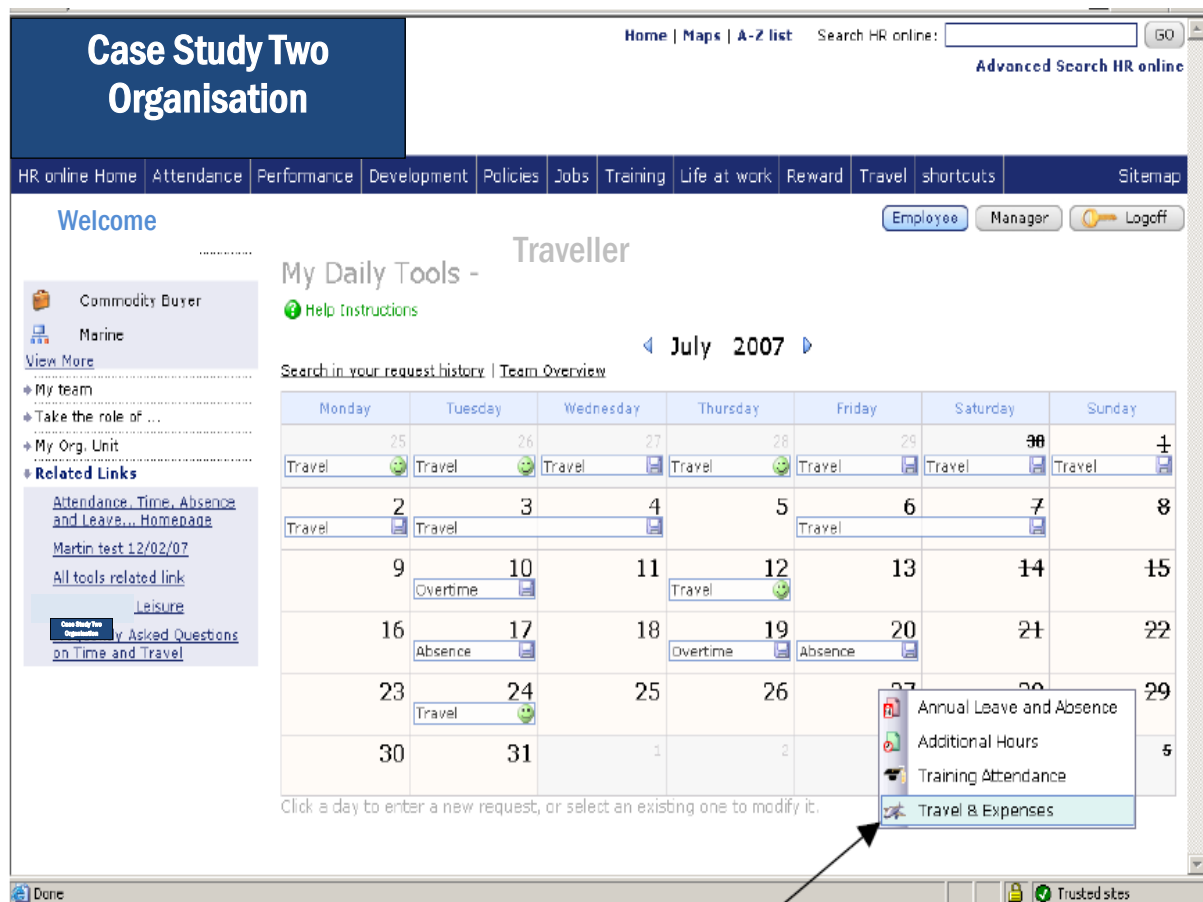
Figure 7.2 How to Start a Trip Request (Source: SAP system, screenshots of Case Study Two Organisation)

Figure 7.3 illustrates how to create trip details. For creating trip details, travellers need to add the basic details like trip type (domestic or non-domestic), destination, and reason for travel. Travellers need to complete the date from and to details and the time from and to information.

To add trip details, travellers also need to add a cost assignment. The details of the cost assignment process are described below:

Cost Assignment

- If the traveller does not alter this area the trip will default the charge to the traveller's own company code and cost centre;

• To charge to another cost centre or a network and activity, the traveller has to select the cost element field and select the cost element from the drop down list;

• The traveller will then need to enter the company code and cost centre; and

• Costs can be apportioned by percentage. By reducing the percentage tab to below 100% another line will appear to enable the traveller to charge the residual percentage to another cost centre or network and activity.

Figure 7.3 How to Add Trip Detail (Source: SAP system, screenshots of Case Study Two Organisation)

The traveller then can click on the 'save' icon to generate a trip number (see Figure 7.4).

Figure 7.4 also shows that the traveller needs to note the status (domestic/ non-domestic trip) once they have saved the trip number.
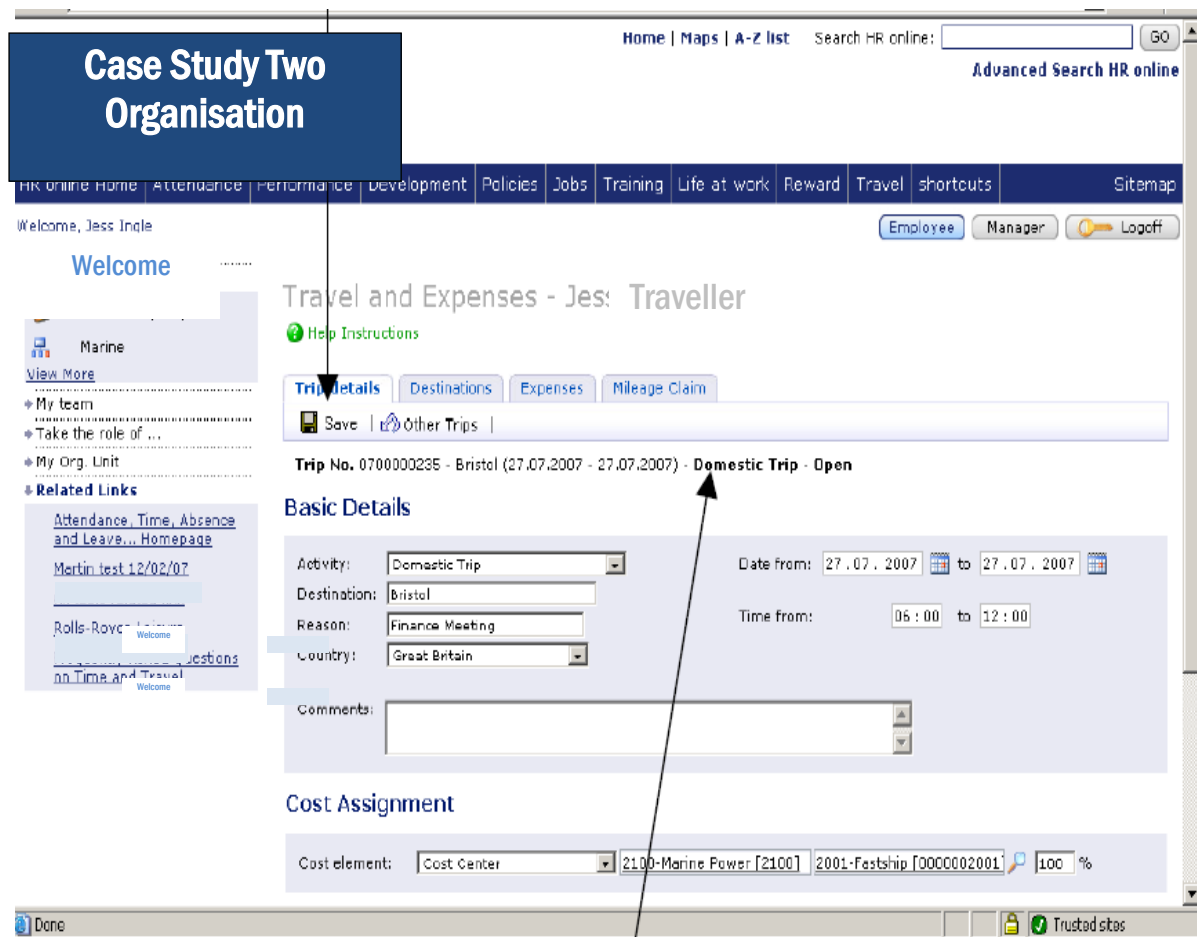
Figure 7.4 Generating Trip Number (Source: SAP system, screenshots of Case Study Two Organisation)

Domestic trip

   • Domestic trip – Trip does not need pre-trip approval.

Non-domestic (i.e. International)

   • Trip open – Trip will need pre-trip approval (Trip approval can be done by contacting the line manager through the SAP system).

Once the traveller creates a trip they can add the details of the travel destination. Figure 7.5 shows how to add the details of travel destinations.
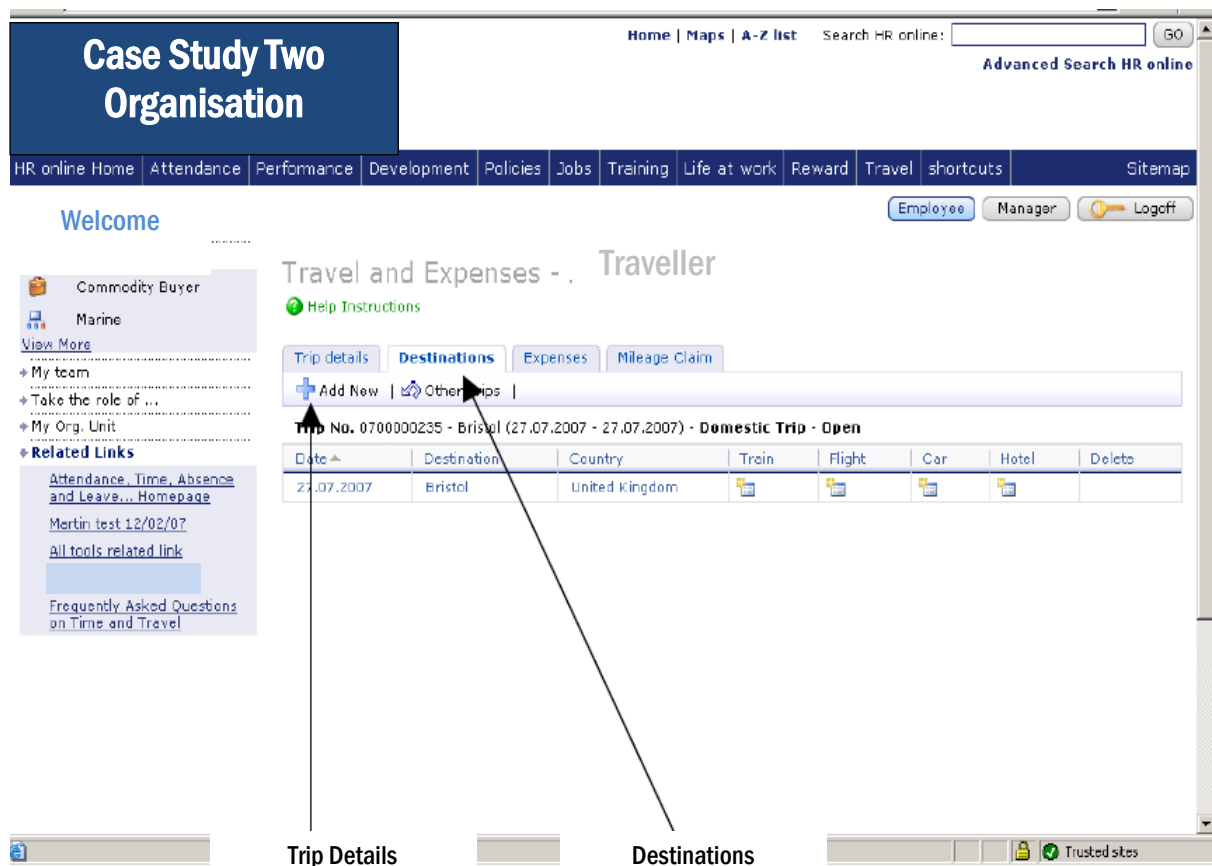
Figure 7.5 Adding Details of Travel Destinations (Source: SAP system, screenshots of Case Study Two Organisation)

The traveller can click the destination icon to view the first destination. If the traveller needs to add another destination they need to select the 'add new' icon. The traveller then needs to add destination details. Figure 7.6 shows the process of adding destination details.

Figure 7.6 Adding Details of the Destination (Source: SAP system, screenshots of Case Study Two Organisation)

Destination details:

- Travellers need to enter the date, time, destination, and country fields and click on the save icon; and

- The destination(s) for the trip is (are) summarised on an overview screen.

The traveller can select the means of transport and the hotel details by clicking on the relevant option. However, recording this information does not book the trip. To do this the traveller needs to contact the organisation's designated TMCs to book accommodation and transport. A tick shows the type of accommodation and type of transport recorded for each stage of the trip.

Employees who travel must complete a 'traveller profile' with key information (necessary to complete business travel reservations) before travelling from the organisation for the first

time. This information is kept by the allocated TMC securely. Once a 'traveller profile' is created it is not necessary to create it second time before travel. All travellers who need to travel more than once a year have to create a 'traveller profile'.

After undertaking the travel, the expenses that have been incurred by the traveller must be entered in to SAP, which then uploads all the costs. Line managers are then able to go back to that trip number and check the final expenses, e.g. a hotel costs paid by the traveller's credit card or car rental costs. The traveller needs to complete the expenses form on the SAP system and then needs to submit that again to their line manager for expenses; then they see the total cost and approve it. Finally, the traveller's expenses request goes to the finance department, and they pay directly to the traveller's bank after auditing those expenses in line with the both the company's and Government's tax policy. According to M-SA1, the company reimburses employees in a timely manner only for authorised travel expenses. Evidence of travel is needed to claim any money, i.e. receipts which are correctly completed and submitted by the employee. From the user's perspective, the SAP system works well. However M-SA2 mentioned that, for reimbursement the traveller needs approval from the line manager through SAP, then they print it, attach the invoices and send it to the expenses department. This system is little complex because the traveller needs to print the SAP form to attach receipts.

According to both strategic administrators and also the users [M-SA1, M-SA2, M-SA3, M-EU1, M-EU2], the approved TMC is good to use as in case of any cancellation the TMC gives a full refund of the booking, the TMC gives the best possible price (as TMCs can get discounted tickets/rate from the airlines, rail car booking companies and from hotels) and gives 24 hours duty of care provision. According to M-SA2, "*it is just a hassle to find your own flight. Time is very valuable and you do not want to spend all of your time searching for the best deal. You have to trust that the TMC is not making a lot of money from us or ripping us off.*" However, this organisation also has an online self-booking travel solution for all travellers which is called KDS. This system has been built by the organisation for all point to point return trips (i.e. Birmingham-Frankfurt-Birmingham), and Low Cost Carriers (e.g.Easyjet, Ryanair). Travellers need to pay for all low-cost carrier reservations on an individual credit card. Booking via this online tool will provide alternative wait times and travellers can make the reservation themselves. If the traveller has to use this facility they have to contact the TMC with some information, such as: a) full name as it appears in the traveller's passport, b) email address and c) cost centre. The online tool is supported by the

manufacturing organisation's TMC team and the transaction fees are completely free whereas the TMC does change a nominal booking fee.

The above discussion gives a view of the current process in Case Study Two organisation. Figure 7.7 represents the business travel management process for the Case Study Two organisation. It shows the involvance of the job roles to manage business travel and the steps of business travel (before and after undertaking).
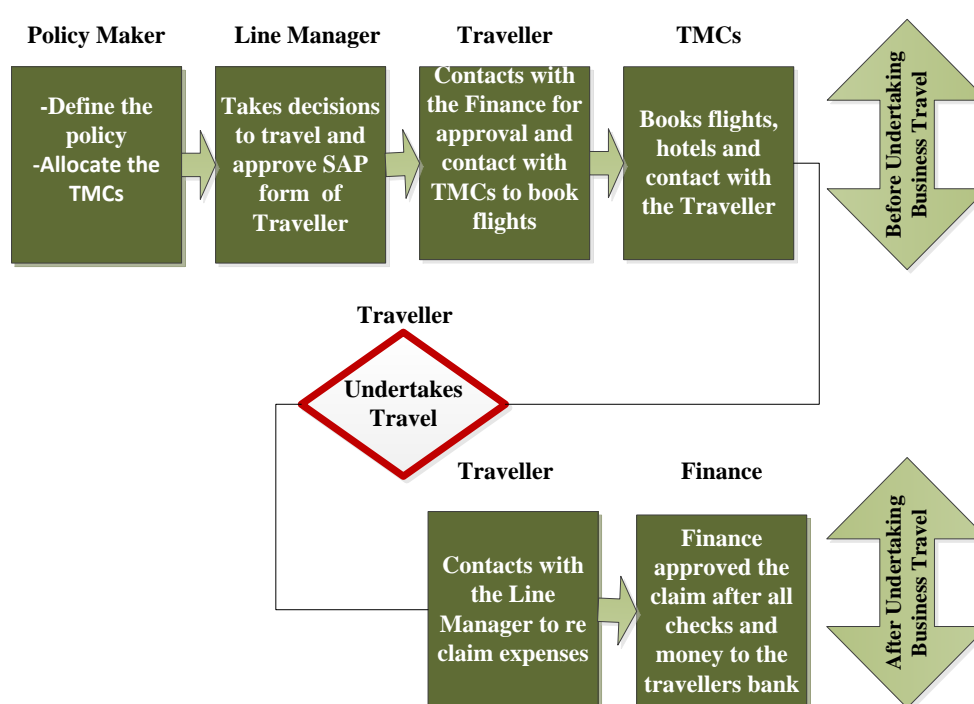
Figure 7.7 Business Travel Management Process in Case Study Two Organisation.

According to policy maker M-PM1, the two main objectives of the business travel of this organisation are "*cost reduction and compliance improvement*". On the other hand, two strategic administrators [M-SA1, M-SA2] modified this slightly and suggested that securing the most cost effective travel while maintaining employee safety are important. M-SA1 mentioned this organisation has a strategy and removes as many legacy systems to keep one standard throughout as possible. M-SA1 suggested, "*Organisations must have business travel management process objectives of cost efficient travel, duty of care for employees, so it's not always the case that cheapest travel is needed also the organisation got to make sure people are looked after and they have security*". M-SA1 also mentioned that, if people are away for the long-term, the organisation has a global team to assist the travellers. Another strategic

administrator [M-SA1] mentioned the current process works well. The organisation is still constantly looking for improvements. Thus they review the policy to make sure it still meets the current requirements of the business. The organisation reviews suppliers like credit card providers and other third parties throughout the year, because obviously circumstances and products change over time and the organisation needs to be aware of these going forward.

One question posted to all interviewees related to the design of 'the ideal business travel processes. It is noticeable that different interviewees gave different thoughts. Five interviewees [M-TA1, M-SA2, M-EU-1, M-EU2, M-NU1] all users, a tactical administrator and a strategic administrator, mentioned that the current process is the ideal process and three interviewees [M-PM1, M-SA1, M-SA3] mentioned there are some improvements that could be made. According to M-PM1, the ideal business travel process is "*an end to end, seamless booking and payment process*". According to one tactical administrator [M-TA1], the current process is ideal. They stated that, "*the system is perfect and I cannot see how they could change the process*." This is because the process considers a combination of the cheapest overall cost and yet gives most flexibility. M-TA1 also mentioned that the traveller can ring the TMC and give their trip number, then the TMC books the flights, a hotel for the traveller and this process works well with the organisation. On the other hand, M-SA1 mentioned, "*the ideal process would probably be that I get approval from my manager and then I just can go straight online and I can book my travel. All the charges will be done automatically. I think a self-booking tool is better. Years ago, I saw software on the market where you could see your flight availability and press a button. It was all done for you in a minute. With SAP we cannot see what is available*."

The strategy in this organisation system is trying to use SAP as much as possible. However, according to M-PM1, *"we have realized that in some countries it is not possible. They have got their local systems. This is why we have we have a global policy and one global agreement to know where they are going."* Hence in many countries this organisation does not have SAP booking.

7.3.3 Outcome of the Process

This organisation spends a substantial amount on business travel. The turnover of this organisation is approximately £8 billion of which the annual business travel spend is £100 million. The organisation encourages all travellers to consider whether their travelling could be replaced by video conferencing. If travel is needed then the organisation helps to find the

cheapest way to undertake it. It was found from the interview that 80% of trips are UK domestic which are relatively low value and 20% oversees travel is more cost involved [M-PM1].

Overall, in 2010, a total 45,493 hours of business travel was undertaken by the UK organisation. According to M-PM1, senior management business travel accounts for 20% of total business travel, middle management accounts for 60% and operational staff accounts for 20%. M-PM1 also mentioned that, in 2010 33% of business travel in this organisation was undertaken for internal meetings, 49% was for external meetings, 11% for conferences and 7% for training.

In terms of mode use, in 2010, 73% was undertaken by air, 2% by own car, 18% by pool car/hire car, and 7% was by public transport, exclusively rail [M-PM1]. One experienced user [M-EU2] mentioned, if travellers need a car they can book directly through the approved TMC. Although travellers can choose to use their own vehicles for business trips and then claim the cost afterwards, using their own car for business trips is not recommended by the organisation to save the cost of fuel consumption. The organisation has a vehicle specification (Table 7.4) for travellers.

7.3.4 Issues

All interviewees from both the strategic level and the implementation level mentioned that the current process works well. However, there are a few changes which could be made and little problems that still exist. Current issues highlighted by the interviewees are described below:

- With the SAP system the traveller cannot see information about flight availability. The system needs to be available to make sure people are not booking things that they should not book and obviously should ensure that the traveller/organisation is getting the best possible price. This means it is currently possible to make a sub-optimal booking choice [M-SA1];
- The current business travel process is fine at the front and end albeit there is no integration between the SAP and the TMC. Travellers contact with the TMC via phone; The TMC chooses the airlines, hotel and books these for the traveller. If there are better deals available later, the TMCs cannot offer them and cannot change the booking details/trip number given by the traveller [M-PM1, M-EU1];

- For international travel, there are often complications relating to visas. That needs lot of knowledge and a lot of time. This organisation does not provide an administrator/secretary to all travellers to book travel. So if anyone has to organise visas on their own it can cost a significant amount of time[M-SA21];

- By using online self- booking tools it is possible to get a cheap train ticket or hotel accommodation. The main reason for using a TMC is to get security and refunds in the event of cancellation. If a new system could save the time that the TMC takes then this would be better. [M-SA-1];

- The expense claim system can be quicker and improved. Travellers get reimbursed by trip number. They fill in SAP forms both before and after the trip. When they press the submit button it goes to the manager, the manager then approves it, and then the traveller gets a confirmation email from the manager. Then the traveller prints the letter, attaches the invoices and sends it to the expenses department. While this organisation has so many branches, not all of them have an expense department and in that situation the traveller has to post the receipts and signed approval form to the expenses/ finance department of another office. According to M-SA2, this part can be improved; and

- Measuring the return of investment (ROI) of travel is the key to organisational development and finding a mechanism to qualify this can prove difficult [M-PM1].

There are quite a few issues that need to be considered in future. According to M-PM1, changing the SAP process would be challenging for this manufacturing organisation because establishing any new system costs a lot of money. Because the cost organisation cannot change the system on a short-term basis (like one to two years), the system needs to last at least ten years [M-SA2].

According to M-SA1, the main motivation for changing the business travel policy for this organisation is the strategy of business in the coming years. Before undertaking business travel the traveller needs to explain the reason for their travel to the manager. This system is in place but needs to be stronger and more methodological, such as high level travellers like policy makers do not need to report to anyone and in these cases often the organisation does not have records of reasons for travel. Everybody in the organisation needs to follow the strategy. From the strategic level the strategy should be given and management needs to make sure that employees are meeting the key objectives of the strategy at all levels.

7.3.5 Future of Business Travel

Two interviewees – one at the strategic level [M-SA1] and one at the implementation level [M-SA1] – mentioned different thoughts about ideal business travel process in the future. According to M-SA1, a system by which travellers will get approval from their line manager, then just go straight online and book the travel is an ideal process. All the charges will be done automatically via a self-booking tool. M-SA1 noted, "*Years ago I saw there was software on the market where you could see your flight availability and you could then press a button and it's all done for you in a minute. With SAP we cannot see what is available. The down side of that is the system needs to be available to make sure that people are not be booking things that they should not be booking, and obviously we must get the best price. Also there are some training issues*". However, M-SA1 also mentioned that the TMC takes lot of time but it is safe to use because of duty of care support.

On the other hand, an experienced user [M-SA2] from the implementation level mentioned that the ideal travel process would be much a easier process if one could get someone else to book, so that the traveller does not need to spend so much time booking and claiming money and at the same time business travel will build the client relationship for a minimum cost. So in this case an administrator in the middle might be helpful in the future.

A policy maker [M-PM1] mentioned that the organisation is not looking to change its approach to business travel in the near future. However, the government could help by supporting reduction of APD (Air Passenger Duty), and that greater support of regional airports would save time and car emissions. In terms of governmental help, M-SA1 mentioned that Government policy needs to consider the cost implications on businesses. M-SA1 also mentioned, "*I can use something like VAT rate change a few years ago, they changed the VAT rate to 15%. They obviously saved but it cost us quite a lot of money to change our system. So in any kind of legislator change the easiest possible is to change it locally.*"

A Business Travel Newsletter (2012) issued from the organisation suggests that travel costs can be managed better in this manufacturing organisation simply by adhering to an improvement of booking behaviours such as the following examples:

1. Booking more than 14 days in advance when possible;
2. Ensuring that all hotel bookings are made through the allocated TMC;

3. Considering the use of indirect flights on long haul routes if the traveller does not need to undertake travel on an urgent basis and the traveller is flexible with the time;

4. Ensuring that the cheapest air tickets are purchased in line with the policy; and

5. Use is made of the KDS on-line booking tool for simple (point-to-point) reservations.

Thus there are several aspects that can help to manage business travel cost for the future. Organisations need to review, monitor and change little aspects if needed and this review should be a continuous process. So, for the future this organisation could well alter the system to overcome the issues previously noted.

7.4 BPM FOR BUSINESS TRAVEL PROCESS MANAGEMENT

This section gives a graphical representation of the business travel process management of the Case Study Two organisation by developing IDEF0 process models. Reasons for selecting IDEF0 method have been described in Chapter Three.

Node A0 Managing Business Travel Process (Strategic and Implementation Level)

A0 is the context diagram and represents top-level activities that give a basic view of managing the business travel process (Figure 7.8). These activities are involved in both strategic level and implementation level. In this process the organisation works with inputs (in strategic level) such as business trip data, purchase requisition data and travel need to produce outputs or project outcomes like future opportunities, project documents, fulfilled business goals, and reimbursed expenses. This activity is carried out with some project constraints, such as: project timelines, company guidelines, industry standards, and business travel policy objectives. The business organisation carried out this process (in implementation level) by using mechanisms such as internal booking tools (SAP), TMCs, strategic administrators and line managers. The business process model aims at proposing development to the current model to maximise its performance and deliver value to its users.

IDEF0 Notation

Control

Activity Process

Input

Output

Mechanism

The IDEF0 notation consists of ICOM (Input, Control, Output, Mechanism) these four categories.
Input: Transformed by activity or process.
Control: Dictate and constrain under what conditions transformations occur.
Output: Created as s result of activity transformations.
Mechanism: Describe how the activity is to be carried out (resource, process etc)

Business Relationship

Time Line

Business Travel Policy Objectives

Company Guideline

Manage Business Travel

Business Trip Data

Future Opportunities

Purchase Requisition Data

Project Documents

0

A0

Fulfil business goal

Reimbursed expenses

Traveller

Booking Tools (SAP)

Line Manager

Strategic Administrators/ Policy Makers

TMC

| NODE: | A0 | TITLE: | Managing Business Travel Process | NO.: | 0 |

Figure 7.8 Managing Business Travel Process Strategic and Implementation Level (Ruikar, *et al.*, 2003).

Node A1 Managing Business Travel Process, (Strategic and Implementation Level)

This process diagram (Figure 7.9) presents the current business travel management process in all levels from the decision making level to the implementation level and from establishing the need for a business trip to reimbursing the traveller's expenses. The traveller first establishes the travel need and then gets approval from their line manager. A SAP system helps to maintain the record of all the details that need to be sent for approval. After approval, the traveller can book the travel via the approved TMC, undertake the travel and claim the expenses afterwards.

Regulations
Budget
Time

| NODE: A1 | TITLE: | Managing Business Travel Processes, All Levels (Manufacturing Organisation) | NO.: |
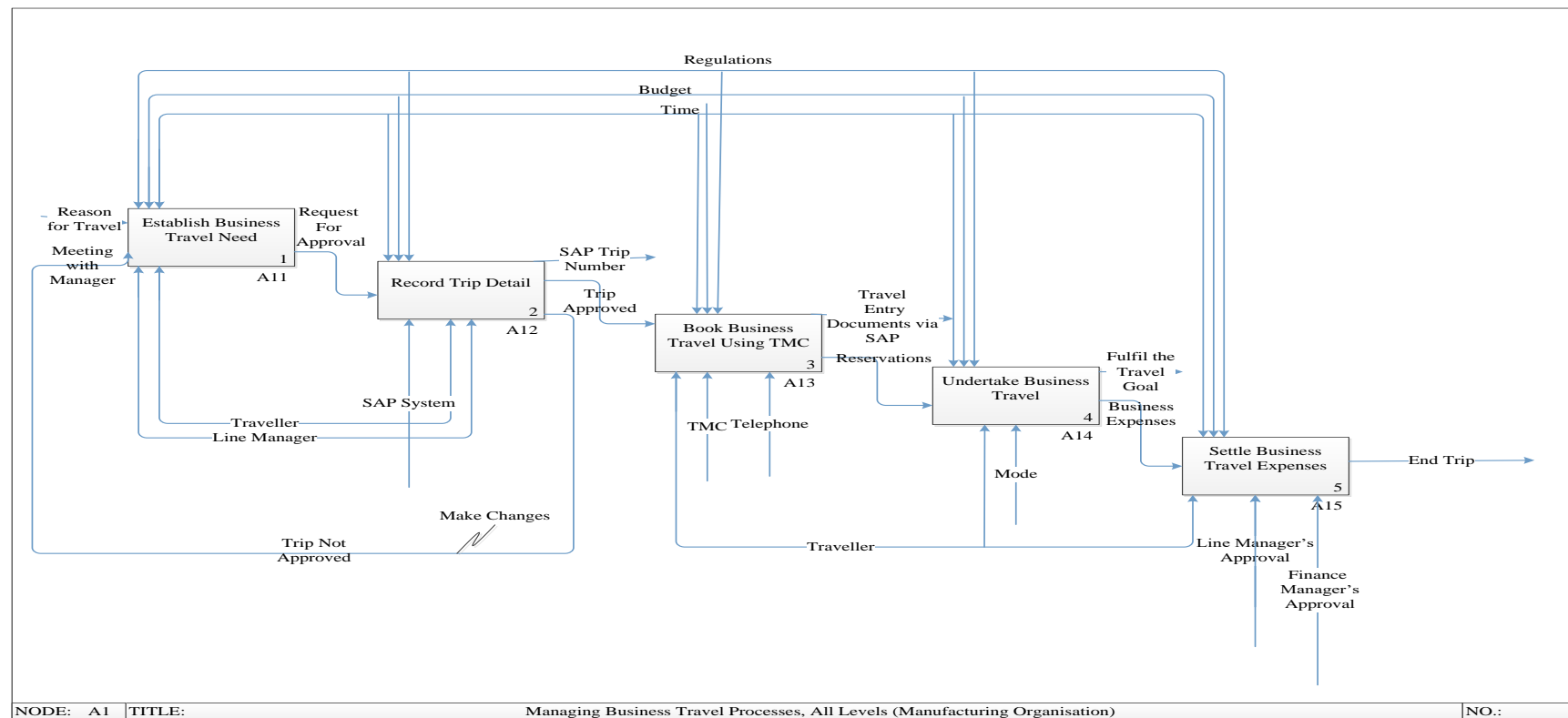
Figure 7.9 Managing Business Travel Processes in Case Study Two Organisation (Strategic and Implementation Level).

Node A2 Record Trip Detail (Implementation Level)

This process shows the steps that need to be taken in implementation level before a traveller can obtain approval from the line manager (Figure 7.10). For the request through SAP, the traveller needs to complete several details like destination for travel, trip details. Once the SAP request is completed by the traveller an email containing travel information is sent to the line manager. The line manager then reviews the details and ensures all the information entered complies with the policy. S/he then approves the request form and a trip number is issued. Regulations, budget and time are needed for the both activities like 'travel request through SAP' and approved by the manager so in the diagram (Figure 7.10) these have been shown as double-headed lines.

Node A211 Travel Request through SAP (Implementation Level)

The Figure 7.11 is for the implementation level where the traveller completes the request through SAP. At the beginning of this stage, travellers need to create a trip number (A2111) by adding basic trip details such as the date of travel and destination name. After generating a trip number the traveller creates a cost centre code (A2112). The trip number and the cost centre code track the travel activities of the traveller and how the money has been spent. After creating a cost centre code, the traveller adds full details of travel destination like the destination country, mode, hotel (A2113).
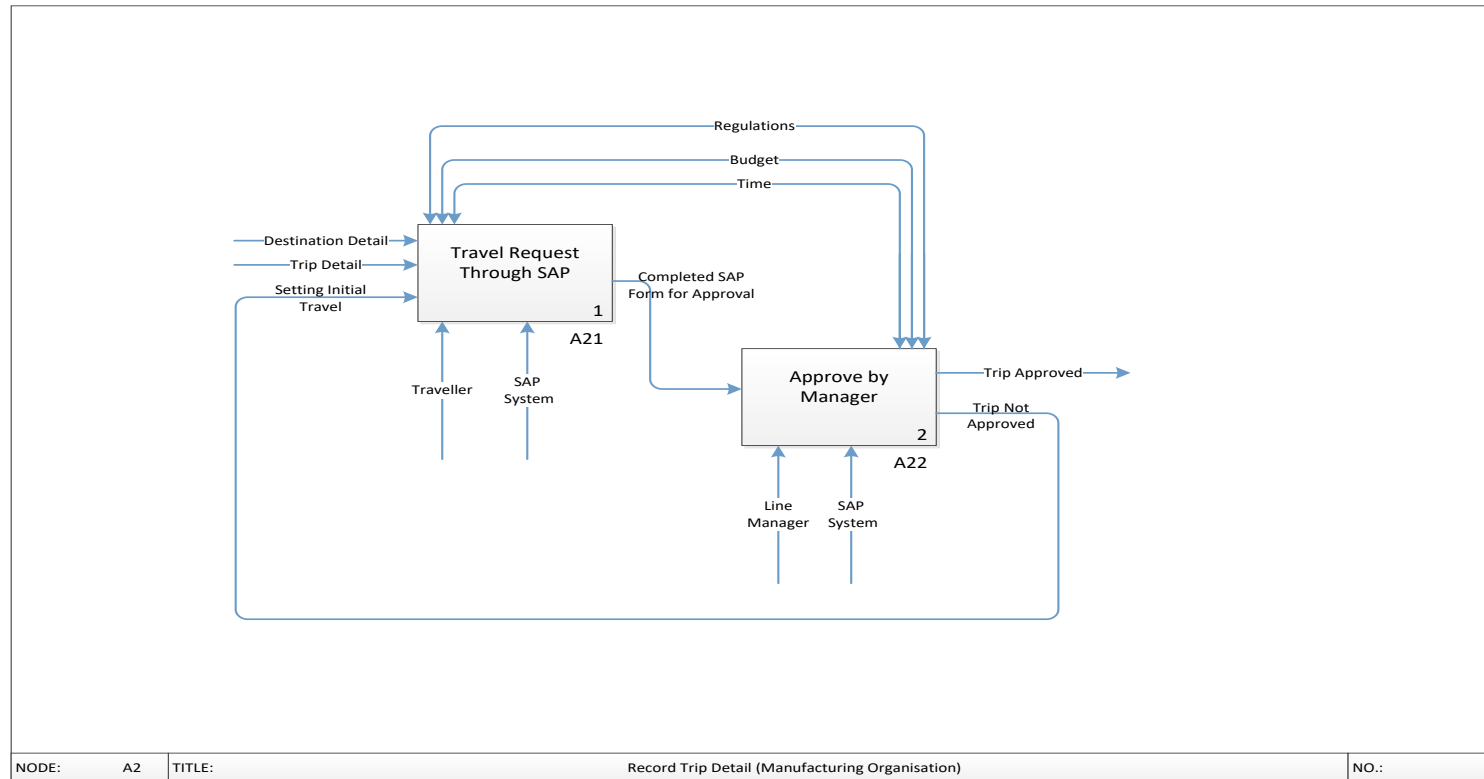
Figure 7.10 Record Trip Detail (Implementation Level).

NODE: A211   **TITLE:**   Travel Request Through SAP   **NO.:**
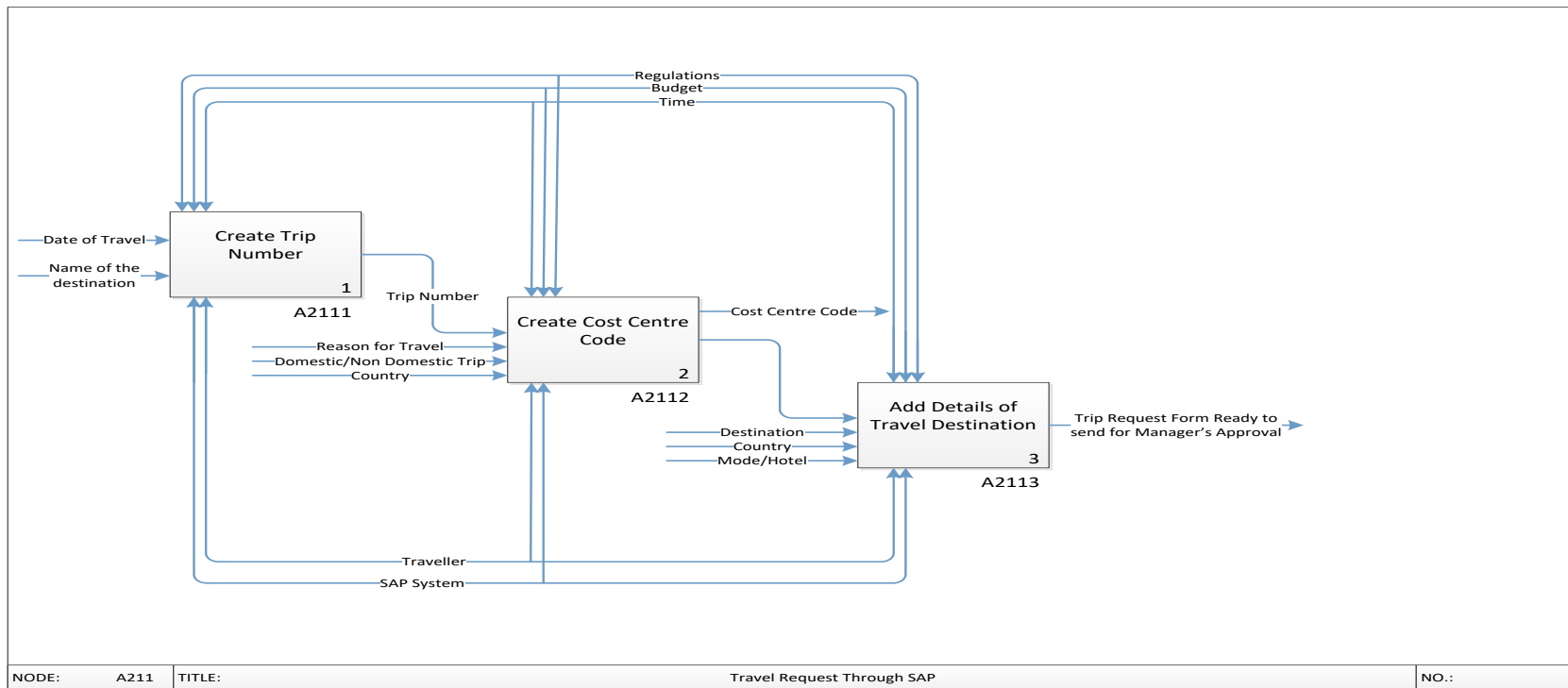
Figure 7.11 Requests through SAP (Implementation Level).

Node A3 Book Travel (Implementation Level).

To complete all the travel related documents (A31) the traveller contacts the TMC after approval from the line manager. The traveller contacts the TMC by telephone. The TMC then books the tickets and hotel that has been requested by the traveller through the SAP form (A32). After booking travel through the TMC, the traveller receives a confirmation document from the TMC which is called 'travel entry document'.

Node A311 Complete All Travel Related Forms Apart from SAP (Implementation Level)

A311 is the child diagram of A31 which is complete travel related forms apart from SAP are completed. To keep a record for the TMC, travellers need to complete some additional forms for the TMC. First they need to create a travellers profile (A311) and there are two categories: either the traveller wants to undertake domestic or non-domestic travel. Then the traveller obtains an annual certificate of analysis (A312). With this annual certificate of analysis the TMC can report the annual business travel record of each traveller to the company. Finally, the traveller gets ready to book travel via TMCs (A313).

| NODE: | A3 | TITLE: | Book Travel | NO.: |
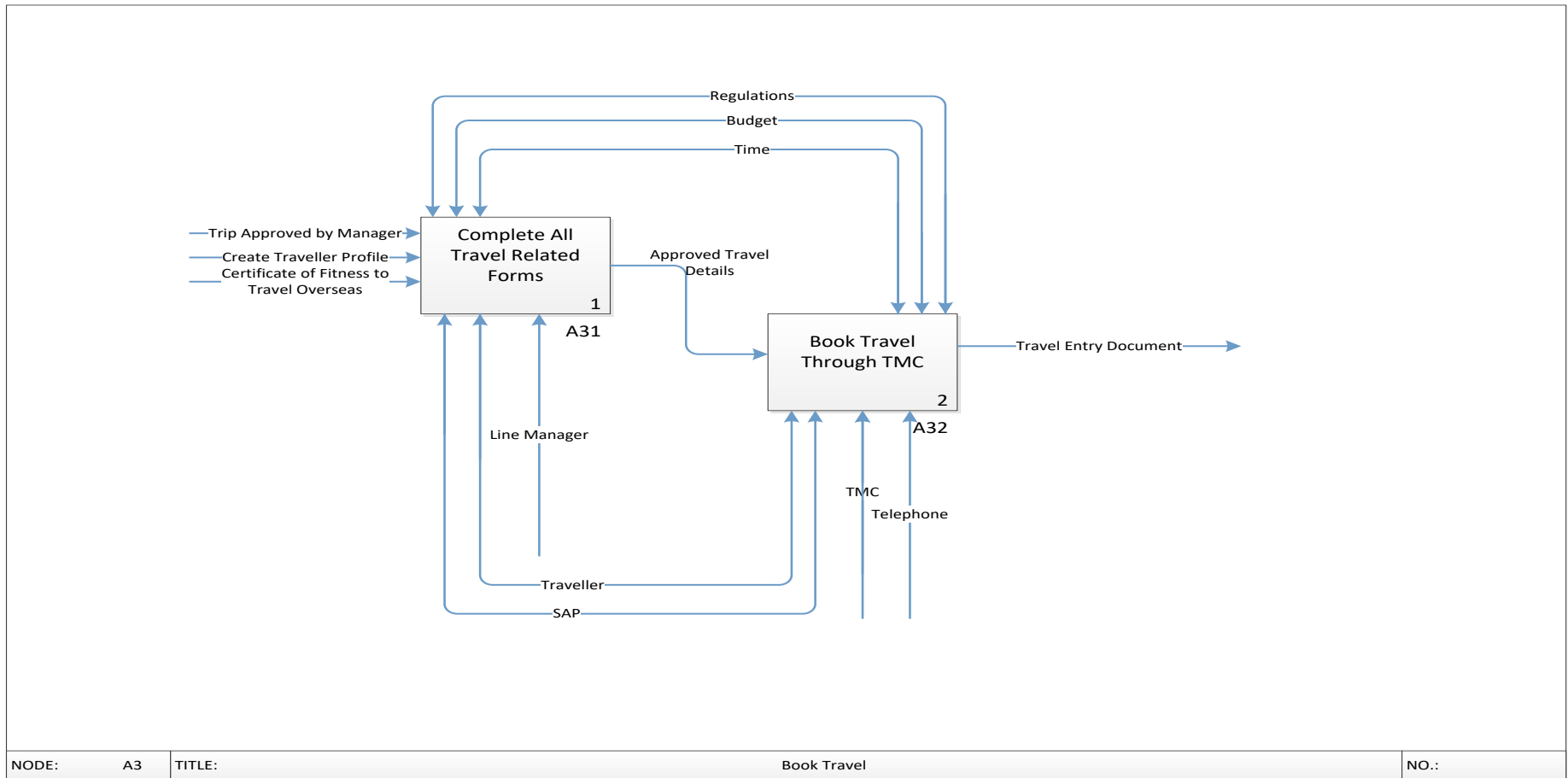
Figure 7.12 Book Travel (Implementation Level).
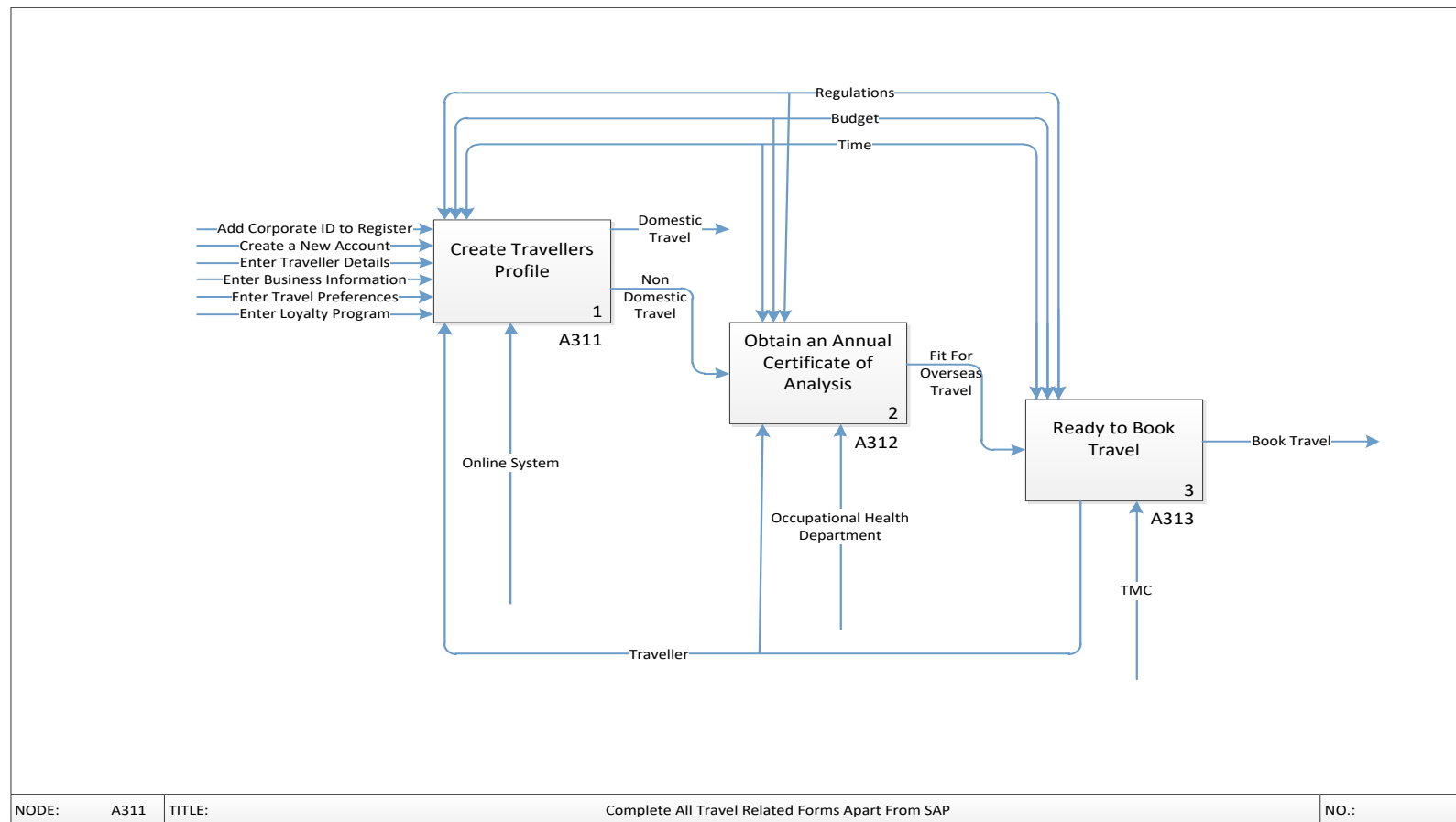
Figure 7.13 Complete All Travel Related Forms Apart from SAP (Implementation Level).

NODE: A311 TITLE: Complete All Travel Related Forms Apart From SAP NO.:

NODE: A4   **TITLE:** Undertake Business Travel (Manufacturing Organisation)   **NO.:**
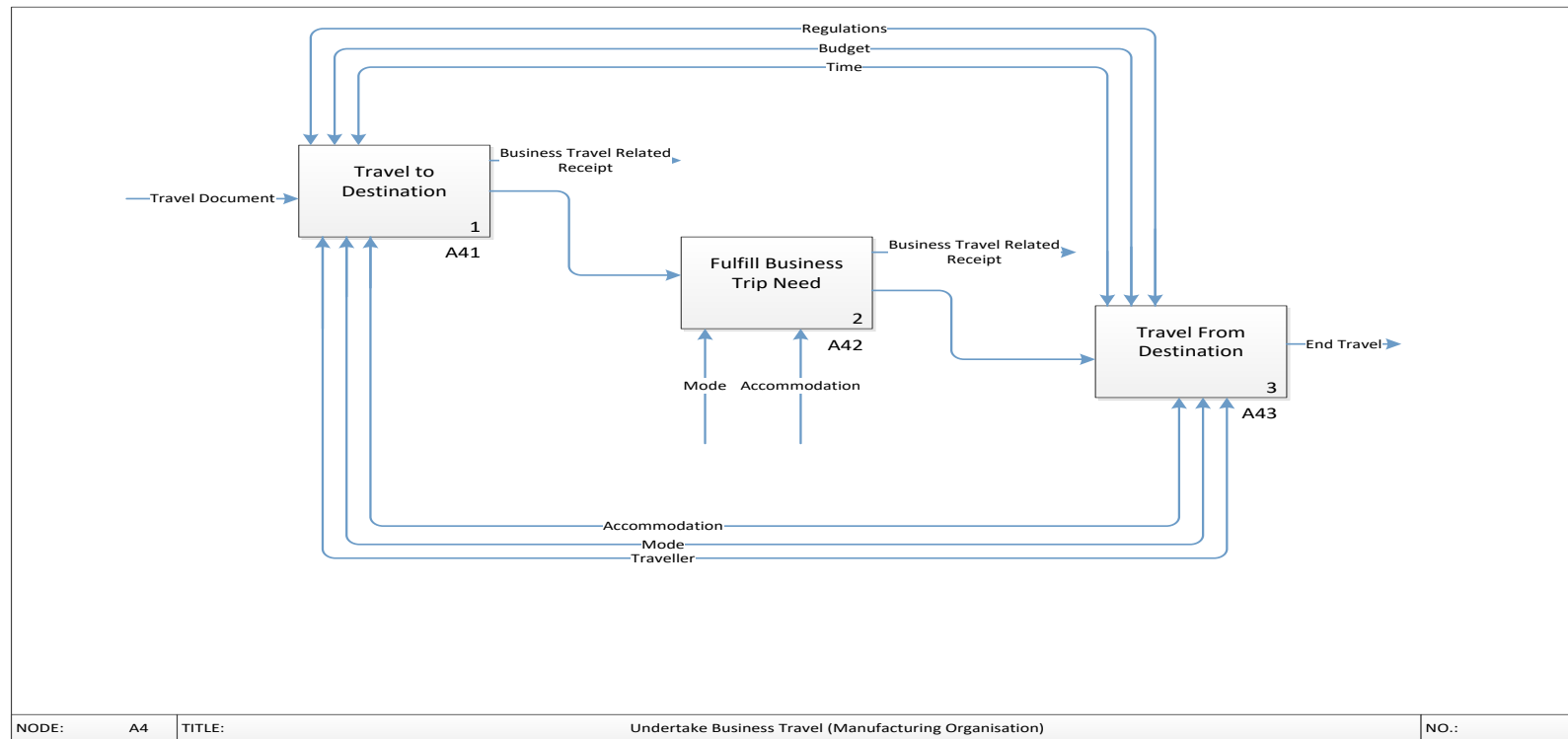
Figure 7.14 Undertake Business Travel (Implementation Level).

A4 Undertake Business Travel (Implementation Level)

After booking the tickets/hotels from the TMC, the traveller starts travelling to the destination (A41). In case of a hazard (such as cancellation of trip because of bad weather, excessive traffic) if the trip is cancelled then the TMC gives a full refund of the booking costs. Once the traveller reaches the destination safely they need to find the meeting place/ hotel and if those places are not near to the station/airport then the traveller needs to book a taxi or take a bus themselves without the help of the TMC. In this case, the traveller needs to keep all the relevant receipts with them for reimbursement. Once the traveller finishes the meeting and fulfils the purpose of the business trip (A42), they travel back from the destination (A43).

7.5 ANALYSIS OF CASE STUDY TWO ORGANISATION

7.5.1 Viewpoints of Strategic and Implementation Levels

This section presents the analysis of case study findings based on their business travel process in two levels: strategic and implementation. The case study findings suggest mobility of employees, hierarchical position, and income of employee influences business travel. However, all interviewees disagreed about gender. This findings do not comply with the literature, as literature suggests men still dominate the business travel market; also preferences for travel experiences differ by gender, as men traditionally are not scared of taking risks, while women are more likely to be searching for security (Collins and Tisdell, 2002). However the ratio of more women travellers than men is higher. According to Mallett (1999, p .71) "*women's business travel has grown faster than men's over the past 18 years*".

The different viewpoints from policy makers, strategic administrators, tactical administrators and some travellers help to identify the lessons. The lesson learned from the viewpoints is shown in Figure 7.15 (a-f) below.

Strategic Level

Implementation Level

Policy Maker's Viewpoint

The booking process works well albeit there is no integration between the SAP system and the TMC. If a system can develop that integration between the SAP system and the TMC then this would be an improvement.

Strategic Administrator's Viewpoint

Before changing the SAP system the organisation needs to check the longevity of the new system .This is because changing a system in the short term can be cost intensive .

Tactical Administrator's Viewpoint

Members of the organisation cannot access the various options on airlines or hotels that available to the TMC. If the SAP system could give that option that could help the traveller. Currently the traveller has to ring the TMC to find the allocated supplies.

Traveller's Viewpoint

The traveller contacts with the TMC via phone. TMC chooses the airlines, hotels and books these for the traveller. However, if there are better deals available later, the TMC cannot offer it, and cannot change the booking details/trip number given by the traveller.

Lesson learnt: Needs integration between organisational Online Booking System (OBS) and Travel Management Companies (TMCs)

Figure 7.15 a. Needs integration between organisational Online Booking System (OBS) and Travel Management Companies (TMCs).

Policy Maker's Viewpoint

Cost reduction and compliance improvement are the key objectives that the organisation set out to achieve while designing for the business travel process management system.

Strategic Administrator's Viewpoint

Cost is an important objective that the business travel process is looking to minimise in this organisation. Also a simple change in the business travel management process can cost lots of money.

Tactical Administrator's Viewpoint

The organisation looks for the cheapest option to book travel.

Traveller's Viewpoint

The current process is combination of cheapest overall cost with a high level of flexibility. Generally the system works well.

Lesson learnt: Cost is an important objective to plan for business travel process management

Figure 7.15 b. Cost is an important objective to plan for business travel process management.

Strategic Level

Implementation Level

Policy Maker's Viewpoint

Time is an important issue. An ideal business travel booking process would be a seamless booking and payment process which can save time.

Strategic Administrator's Viewpoint

In the current process booking travel via TMC may cost a little more than expedia/self-booking, however it saves time and gives security.

Tactical Administrator's Viewpoint

Time is an important issue and the existing business travel booking process works well.

Traveller's Viewpoint

Lots of people who are doing international travel do not have much time to fill in visa application forms so that their secretary normally does it for them. If the traveller has to fill the visa form it is time consuming.

Lesson learnt: Time efficiency is an important issue during both the travel planning and booking process

Figure 7.15 c. Time efficiency is an important issue during both the travel planning and booking process.

Policy Maker's Viewpoint

The organisation does not track carbon emissions as to do this accurately is fairly complex for the organisation. The environmental department of this organisation calculates the number of miles and uses this as an indicator to keep a record.

Strategic Administrator's Viewpoint

A carbon calculating tool linked to the business travel system would be appropriate.

Tactical Administrator's Viewpoint

At present the environmental department uses mileage as a proxy to 'calculate' carbon and it works well.

Traveller's Viewpoint

Had no option about carbon calculation.

Lesson learnt: Measuring the carbon footprint is a challenge

Figure 7.15 d. Measuring the carbon footprint is a challenge.

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Strategic Level		Implementation Level	
Policy Maker's Viewpoint	**Strategic Administrator's Viewpoint**	**Tactical Administrator's Viewpoint**	**Traveller's Viewpoint**
The main motivation for the organisation is to change the business travel process, and to reducing cost and improve efficiency. The organisation is trying to find an efficient way to carry out the visa approval process.	An external organisation sorts the visas for the organisation. Travellers do not send visa applications to individual agencies.	The TMC sends the visa form to the traveller, who then fills the form, attaches photos, gets a signature from the line manager and sends it to another external organisation. This process works well but can be improved.	The people who do lot of travel have their secretary to book the visa for them. However, for general travellers applying for a visa takes lot of time and knowledge.

Lesson learnt: The organisation needs more efficient way to sort out visa applications

Figure 7.15 e. The organisation needs more efficient way to sort out visa applications.

Strategic Level		Implementation Level	
Policy Maker's Viewpoint	**Strategic Administrator's Viewpoint**	**Tactical Administrator's Viewpoint**	**Traveller's Viewpoint**
For the future, it would be better to have more integration between the SAP and TMC. However, only relying on direct booking from Expedia/internet booking may not be ideal for security reasons, as booking travel via TMC gives 24 hours duty of care and TMCs also refund the money in case of cancellation of booking.	With the SAP this organisation cannot see the full range of flights and the down side of the system is people are not sure if they are booking the right travel option for the best price.	System works well as it gives traveller's security by TMCs by 24 hour service.	The system works well.

Lesson learnt: Self-booking tools without the TMC can be the next step in changing the system

Figure 7.15 f. Self-booking tools without the TMC can be the next step in changing the system.

It has been found that the organisation needs integration between the organisation's online booking systems by staff direct with the TMC to save cost (Figure 7.15a). Literature suggests it is not confirmed how trustworthy, satisfactory and dependable is travellers' online booking via TMCs, however the interaction between structural and social bonds was supported (Sigala, 2007) According to Berthon *et al.* (2003), internet-based technologies provide effective and efficient ways of conducting business. On the other hand travellers can easily and rapidly gather information about available suppliers (airline, car, rail, hotel) and their products and services.

As with Case Study One, in this organisation cost is an important objective to plan business travel process and policy (Figure 7.15b). Business trips with multiple destinations usually involve several suppliers (air, rail, car rental, and hotel) and business trips with multiple destinations usually involve several suppliers. Organisations usually outsource service delivery to a TMC to simplify the network, and to guarantee suitable routes and rate each trip (Holma, 2012). According to Upton (2005), business travel is generally the second or third largest controllable cost for a company and it is worth monitoring. Literature suggests that the amount of money spent on business travel-related services is increasing, while the resources allocated to managing the purchasing are not increasing proportionally (Ellram *et al.*, 2007; Holma, 2012). However, organisations aim to decrease travel cost by reducing the cost per trip, not necessarily by diminishing the number of trips (Aguilera, 2008). Decreasing travel cost puts pressure on efficient supply management (Holma, 2012). So besides cutting the cost per trip organisations also need to eliminate the number of trips where possible.

The policy maker's view of this case study organisation is that the ideal business travel process would be a seamless booking and payment process, which can save time (Figure 7.15c). According to Heung (2003), organisations are more focused on time saving and are more likely to access a greater proliferation of product information. Online booking systems via TMC or individual travellers, however, can save travellers' time (Heung, 2003).

This large multinational manufacturing does not track carbon emission because of its complexity (Figure 7.15d); however they calculate the number of miles to keep a record of their carbon footprint. According to Roby (2010), organisations are now subject to a range of new carbon reporting frameworks. However, unlike electricity or gas uses, business travel is not covered in these regulatory frameworks, such as in the carbon trading scheme as part of the Carbon Reduction Commitment (The Carbon Trust, 2010) and for vehicles not owned by

the organisation, only as a voluntary reporting element under Scope 3 within Greenhouse Gas Protocol. The carbon trading scheme is not applied for this Case Study Two organisation, however it is useful for the society/country and also for the organisation itself if they buy and sell carbon permits as part of a programme to reduce carbon emissions. The reason for this is as a large organisation they have a substantial amount of international and domestic business travel that causes a lot of carbon emissions. The contribution of aviation to global carbon dioxide (CO^2) emissions is projected to triple by 2050 (Davies and Armsworth, 2010). With the carbon trading scheme organisations are usually given a certain quota to pollute a certain amount. If they wish to pollute more than their allowance then they have to buy more permits. However, if they pollute less than their quota they can sell their spare permits on the market. Thus there is an incentive to reduce pollution and find the most efficient way of dealing with pollution.

The Figure 7.15e suggests the organisation needs more efficient way to sort out visa applications. Visa regulations can negatively influence the business traveller's destination, and therefore its economy of the trip (Li and Song, 2013). Facing the visa regulations is a complex procedure and the traveller needs support from the organisation to face this.

The Figure 7.15f suggests, self-booking tools without the TMC can be the next step in changing the system. This organisation uses TMC but for the future development of the booking process the organisation is thinking about developing a direct online booking process without TMC. Sigala's (2007) online business travel management solution enables organisations to take advantage of special business fares and control track savings (Bray, 2002). Thus although "*companies with high level expenditures used traditionally specialised business-corporate travel agencies, nowadays they are immigrating to online business travel management solutions developed either by traditional travel agents seeking to reintermediate their business model or by independent software companies aiming to enter the lucrative business market.*" (Sigala, 2007, p.336). If the traveller can directly contact the supplier (air, rail, hotel, car rental) then the organisation/travellers needs a great deal of security and discounted rate and quality service. According to Heung (2003), the most important issues are security of travellers' sensitive information, quality of information about purchase choices, lack of price competitiveness and disappointment with customer services. Weber and Roel (1999) and Heung (2003) found that the most common reasons for not purchasing travel products online are credit card security and no assessment of product quality.

This has been evident in Case Study One; the policy maker suggests not booking travel online directly. The reason for this is lack of security, no refunds on cancellation and often while searching for a cheaper deal the traveller lost time. However, technology and service can develop in the future and the organisation may find individual booking quicker and safer if current practice of service providers improves in the future.

The findings and analysis of Case Study Two organisation helps to identify some strengths of weaknesses of the current business travel process management in Case Study Two organisation. These are identified and described below:

7.5.1 Strengths of the Current Process in Case Study Two

The strengths of the current business travel process of Case Study Two organisation are identified and listed here. This organisation uses the TMC successfully and the users are satisfied with the current process. The organisation is not looking to change the process currently and consider they have good business travel practices. The strengths of the current business travel process of this organisation are as follows:

- According to the travel policy document of this organisation it has a sustainable policy for business travel;

- Before travel, the traveller has an up-to-date certificate of fitness to travel overseas to take the proper precautions like vaccinations to avoid any health problems. It ensures a safer journey for the traveller;

- The organisation uses one TMC that gives a full refund if any traveller has to cancel their booking;

- The organisation gets 24 hours duty of care for its employees when they use TMCs;

- Good communication in between strategic and implementation levels. This means that if a new policy/system emerges then the traveller is likely to know about its implications promptly; via meetings;

- No tactical administrators complete the travel request (SAP) form or contact the TMCs. Travellers themselves contact the TMCs for all types of booking. In this case the organisation saves money by not appointing any tactical administrators. Also the process goes quicker;

- The organisation allows the use of business class air travel. So for long haul journeys travellers are comfortable enough and they can stay refreshed to attend any meetings the next day.

- Travellers get training for using technologies to replace travel via virtual meetings. IT departments give this training.

7.5.2 Weaknesses of the Current Process in Case Study Two

Even though the users of Case Study Two organisation are satisfied of the current process, however they mentioned some down side of the process. These down sides of the process have been listed here:

- The organisation does not track carbon emissions because they find it too complex. Rather than the actual carbon calculation this organisation uses an indicator to keep a record of miles. This system can be improved and the organisation can record carbon emissions. The organisation can also reduce carbon emissions by using greener modes like electric vehicles;

- With the SAP system, the traveller cannot see any information about flight availability. The system needs to be upgraded to make sure people are not booking options that they should not book so that the traveller/organisation will get a better price.

- No integration between SAP and the TMC;

- For international travel there are often visa complications. This takes a lot of knowledge and time. This organisation does not provide help all travellers with this when booking their travel. So if anyone has to sort out a visa on their own it can cost much time to travel to the visa office [M-SA1].

- Travel management demands a lot of time and sometimes inconvenience. By using online self-booking tools it is possible to get a cheap train ticket or hotel accommodation. The main reason for using a TMC is to get security of refunds in case of cancellation. If a new online self-booking system could give security of refunds that would be better;

- The expense claim system can be quicker and simpler. Moreover, not every branch has an expenses department which can exacerbate the problems at these sites.

- Measuring the return of investment (ROI) of travel is the key to organisational development and finding a mechanism to qualify this can prove difficult. The organisation can appoint an expert or consultant who can do research on what options are suitable for the organisations that are available in the market for measuring ROI.

- A system that can link the organisation with the TMC via an online booking process would be ideal for this organisation. The system needs to allow travellers to see what booking options are available (e.g. the cheapest flights, hotels). The next chapter develops a business travel process management framework that is designed to use such an online booking process that connects the organisation and the TMCs, also gives a holistic approach to overcome all other issues of business travel through better planning and practices.

7.6 SUMMARY

This chapter introduced the findings of Case Study Two. Specifically, it presented and analysed the findings mainly based on their business travel process at two levels: strategic and implementation.

The case study findings revealed that the organisation has an online self-booking process which is connected to the TMC. This process helps the organisation to book travel quicker. However, there are some issues that have been outlined especially in this system, namely that the traveller cannot access various options for travel, the travellers has to depend on the TMC to give them options.

CHAPTER EIGHT

CASE STUDY THREE

8.1 INTRODUCTION

This chapter focuses on introducing the key findings and analysis of an in-depth Case Study Three organisation. Previously, Chapter Three, Section 3.4.3.a provided the rationale for selecting this case study organisation. In this chapter, Section 8.2 provides background information of the case study organisation, 8.3 presents the key findings of Case Study Three; Section 8.4 provides the BPM of Case Study Three; Section 8.5 presents the analysis of Case Study Three findings; and Section 8.5 gives a summary of the chapter.

8.2 BACKGROUND OF CASE STUDY ONE ORGANISATION

This section provides the background information (organisation size, employee number, organisation types, turnover, business travel spend) for the Case Study Three organisation, which is an independent UK transport planning and engineering consultancy service organisation which employs around 270 staff (Staff Handbook, 2013, Service Organisation).

In terms of organisational ownership, the Company's shareholders include the board directors, other directors and some of the staff. Other shares are held in employee trusts and there are no external shareholders. Meanwhile the organisation management structure comprises the board of directors at the strategic level, which oversees a number of functional business units, each of which are teams of staff led by a unit director. All staff and projects are allocated to the most appropriate business unit in order to deliver as high a quality project output as possible for the client.

The offices of this organisation are based in city centre locations with little or no dedicated car parking provision but which instead have good walking, cycling and public transport provision (Corporate Travel Plan, 2009).

Table 8.1 gives some basic organisational details.

Table 8.1 Background for Case Study One Organisation.

Number of Employees	Turnover (£)	Spend on Business Travel (2010) (£)	Organisation Sector
200	£20m	£300-350 k	Finance

Information on the individuals interviewed is shown in Table 8.2. As in the previous case studies, the interviewees were identified on the basis of their job roles and relation with business travel from high level (developing policies), management, administration and travellers. More details on the reasons for selecting the interviewees has already been described in the Chapter Three Methodology (Section 3.4.3), whilst the detailed questions asked are given in Appendix 4..

Table 8.2 presents the background details of staff interviewed in Case Study Three.

Table 8.2 Background of Staff Interviewed in the Case Study Three Organisation.

Job Title and Interview Indicator
Policy maker **S-PM1** (director and the business unit leader)
Strategic administrators **S-SA1** (executive director) **S-SA2** (associate director) **S-SA3** (finance manager)
Tactical administrator **S-TA1** (travel plan coordinator)
Experienced user **S-EU1** (public sector sales leader) **S-EU2** (private sector sales leader) New user **S-NU** (travel plan coordinator)

8.3 KEY FINDINGS OF CASE STUDY THREE

8.3.1 Current Policies for Managing Business Travel

The policy sets out the possible use of public transport for business travel or other sustainable transport means. From the *initial review* process it was found that Case Study Three sees itself as a market leader in sustainable transport and travel behaviour change, a point reinforced by S-SA1, who mentioned that as a transport consultancy the organisation is already interested in, and knowledgeable about, sustainable travel solutions.

As a consequence this organisation aims to ensure that it has a robust travel plan strategy which helps it to minimise the environmental impact of its business travel (Corporate Travel Plan, 2009). An initial corporate travel plan was therefore developed in 2006 to serve this purpose, with the plan then underpinned by a full staff travel survey and office audits later that year. The travel plan was then updated in 2009, with the aim of reducing unnecessary travel and encouraging increased and continued sustainability in travel patterns. It is noticeable, since 2009, that the offices have been shifted to the city and central locations, with little or no dedicated car parking provision and good public transport provision (Corporate Travel Plan, 2009).

The 2009 travel plan outlines many anticipated benefits. These include:

- Greater control over travel-related expenditure by cutting business mileage and improving the efficiency of fleet operations and deliveries;
- Reduction of local traffic movements around offices, improving access for employees, clients and deliveries and helping to improve relations with neighbours;
- An improved work/life balance by reducing the amount of time and stress associated with commuting and business travel;
- A widening of recruitment areas and improved staff retention by improved accessibility to offices;
- Accountability to residents, shareholders and the general public for the company's impact on the environment, by reducing local and global pollution;
- A strengthening of corporate image by contributing to accreditation of environmental management systems; and
- An improvement in the health and fitness of staff by encouraging cycling and walking to work.

Travel plan objectives:

Within Case Study Three one main objective has been identified to form the overarching context of their travel plans, which was to reduce overall company travel and minimise the transport element of the organisation's carbon footprint. The subsequent sub-objectives are as follows:

- To raise awareness and use of sustainable travel;
- To reduce the costs (direct and staff time) of business travel;
- To provide travel guidance to all staff; and
- To minimise CO_2 emissions from business travel.

According to S-SA1, sustainable travel and keeping costs low are the main objectives in this organisation. The annual travel survey in this organisation examines the travel pattern each year, and the expenses record keeps track of how much travel has been undertaken. The travel plan objectives have been chosen to encourage Case Study Three's staff to consider the environmental consequences of their choice of mode and make an informed choice on that basis. Ideally, decisions regarding business travel should include consideration of the following hierarchy (Figure 8.1), with the least sustainable options chosen only where there is no reasonable alternative.

Most Sustainable

- Alternative communication (avoid the need to all travel at all)
- Walking
- Cycling
- Public Transport (including taxis)
- Car share
- Hire car/car club car
- Private car single occupancy
- Air travel
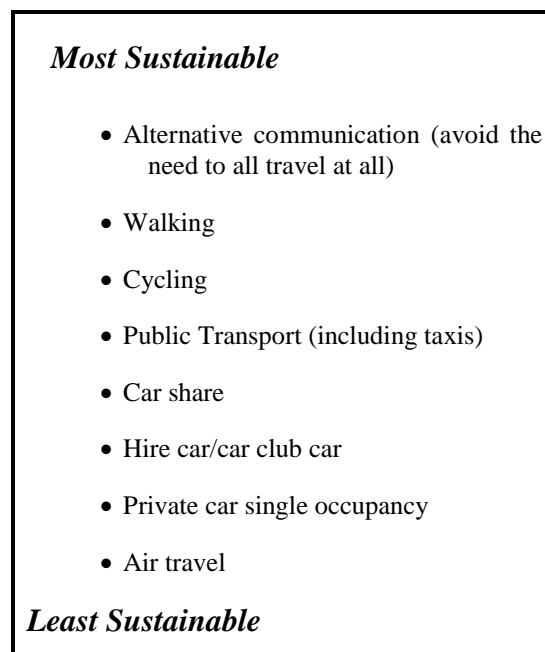
Least Sustainable

Figure: 8.1: Most and Least Travel Mode configured by the Case Study Three (Source: Corporate Travel plan, 2009).

The organisation configured virtual meetings as the most sustainable means as by this the cost of travel and carbon emissions both can be controlled and minimised. Thus other modes like walking, cycling, public transport, car share, hire car, private car and air travel are highlighted as most sustainable to least sustainable. Each mode is identified with travel-related expense claims and vehicle mileage for the business year 2008/2009. S-PM1 mentioned the business travel objectives in this organisation are mainly to meet carbon targets. The organisation has two types of carbon/Corporate Social Responsibility/sustainable travel targets for business travel:

1. For business travel between offices; and
2. For business travel for clients.

According to the documentary analysis (Company Travel Plan Update, 2013) and interview with the policy maker [S-PM1] the organisation currently follows the principals of carbon reporting as described in "Methodology Paper for Emissions Factors" published in 2013 by the UK Department for Food and Rural Affairs (Defra) and Department of Energy and Climate Change (DECC). In this Methodology paper, Defra and DECC (2013) suggest that greenhouse gases can be measured by recording emissions at source by continuous emissions monitoring or by estimating the amount emitted using activity data (such as the amount of fuel used) and applying relevant conversion factors (e.g. calorific values, emission factors).

8.3.2 Context of Current Process Related Information

Through the *impact review* (in-depth interviews) of Case Study Three, it was noted that the business travel decision making and booking processes are done by the traveller with the line managers' approval. However there are no written approval documents, and the decisions are made verbally in meetings. According to SA2, "*basically 30-40 people drive the business in terms of travel plans. Individual managers are involved to take decisions. Administrators in Accounts deal with travel-related money claims*".

Figure 8.2 presents the links between the external and internal bodies who relate to manage and undertake business travel. This diagram helps to show the business travel process used by Case Study Three using a 'top down' approach. Here the business travel process of the organisation has been divided into three stages: the Strategic level, the Implementation level,

and the interfaces between them. It is noticeable that the organisation does not use a TMC. Details of the three levels have been given below.
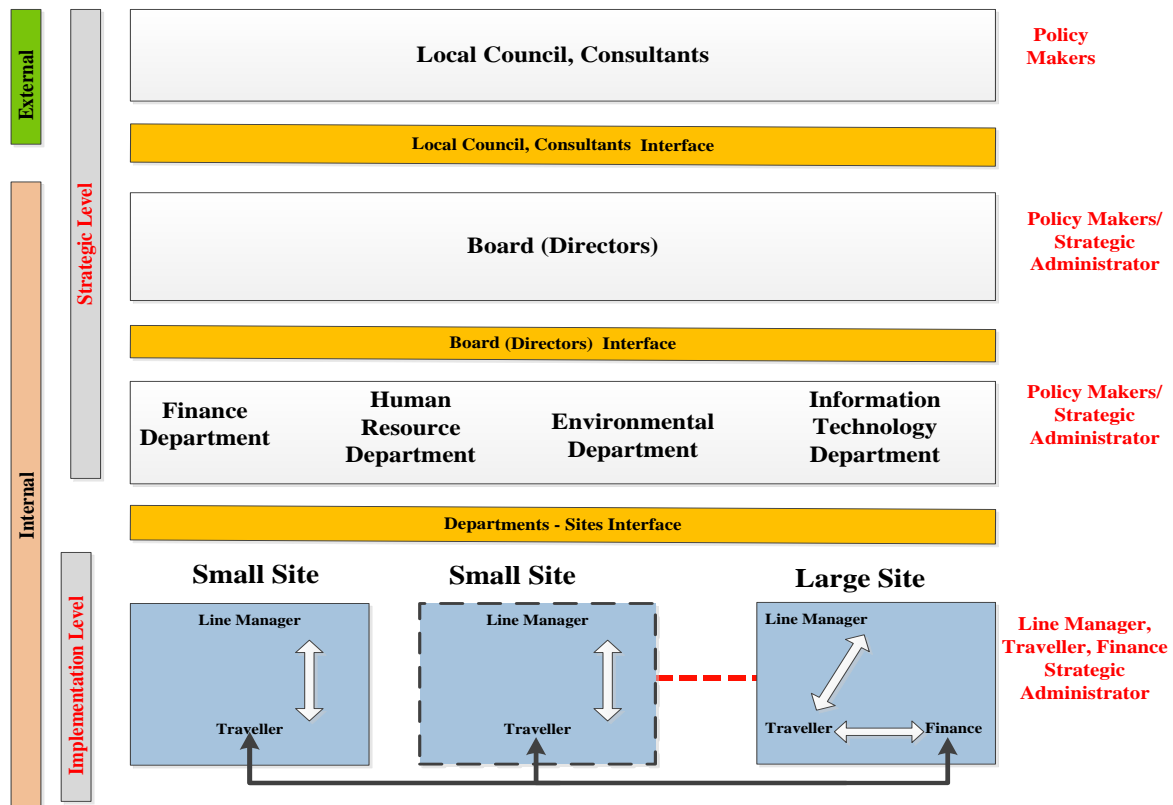
Figure 8.2 Case Study Three Business Travel Process Management Related Bodies

Strategic Level

The strategic level comprises policy makers/directors, strategic administrators who work at the organisational council, and on a consultancy basis (external bodies), Board (internal bodies) and organisational departments (internal bodies). During this stage, the policy makers and the strategic administrators develop the organisational policies and alter them as required.

Implementation Level

The implementation level consists of line managers, finance managers and travellers (who are all internal bodies). This stage uses external suppliers, such as airlines and hotels through

direct online contact. At this stage, the organisation applies the organisational policy in order to undertake business travel and complete the travel.

Interfaces

The organisation has three interfaces which are the shared boundaries across two stages (implementation and strategic) that separated the organisation's committees that are involved with business travel by different bodies like local council, consultants, directors and organisation sites. Three interfaces use meetings, email, telephone and agendas to communicate.

Description of Business Travel Process in Case Study Three Organisation

According to S-SA3, policy making and higher level managing is done by the directors of the company. An annual survey (to see the mode share, carbon emissions) is done by all levels of the organisation staff and carbon calculations are done by an external consultant. All travel has to be booked by the travellers independently with the approval of the line manager. Travellers book the tickets online, provide their relevant receipts and then claim back expenses. Each office has a dedicated travel plan coordinator to provide travel assistance to all staff. The finance department deals with expenses claims and the finance department highlights if there are any issues with the cost and bring it to the policy maker's attention.

The policy maker S-PM1 mentioned the use of a TMC is not needed as the organisation is an SME, and also for flexibility reasons the travellers like to book their own travel. International travel is also very limited in this organisation. Around ten people among the 200 or so staff who undertake business travel travel internationally annually.

S-SA1 mentioned the organisation supports its staff using public transport before anything else. People use cars depending on the circumstances. More locally, the organisation joins uses a city car club, and encourages people to cycle. However, S-PM1 mentioned that reducing cost is not the main objective of this organisation; rather improving the efficiency of the organisation is considered to be more important. For example, sometimes a member of the organisation chooses public transport, as people can work on the train even though train travel can be expensive. S-SA1 mentioned the organisation could always try to re-examine their travel process. If changes to the current process are made, due consideration would need

to be given to find the right balance between trusting employees through general guidance versus hard-line policies that dictate what should and should not be done.

The above discussion gives a view of the current process in the third case study organisation. Figure 8.3 diagrammatically represents the process of the internal and external business travel management process in Case Study Three.
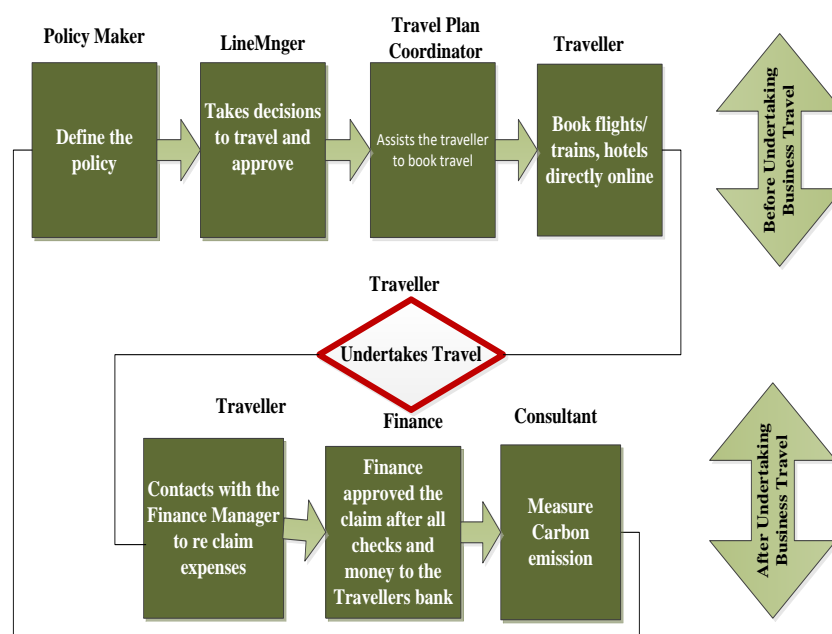
Figure 8.3 Business Travel Management Process in Case Study Three

According to S-SA1, in this organisation people are conscious about saving the costs of business travel because of the nature of organisation which is working on supporting sustainable transport solutions. Therefore this organisation tries to reduce the amount of travel and increase virtual travel or alternative communication methods. In recent years, teleconferencing has been used as much as possible to replace internal/domestic travel. It is more about saving time rather than saving travel cost [S-SA1]. According to S-SA2, in the time of the recession it was important to cut costs, so teleconferencing needed to be used. However, the organisation still needs face-to-face meetings for client meetings to facilitate good discussions.

The organisation has an online money claim system that travellers need to fill in after undertaking business travel. This expense form automatically prompts employees to more sustainable travel choices as the traveller needs to give a description of the type of the mode

use after undertaking business travel. Figure 8.4 shows the online expense claim form of the organisation.

Figure 8.4 Online Expense Claim Form of Case Study Three (Screenshots of the explain claim system of the organisation).

On the expense claim form the traveller needs to give details like which department they have undertaken travel from, what type of mode they selected and the mileage, a description of travel and destination, date of travel claimed, and VAT receipt details if relevant (only if the VAT receipt is attached, VAT receipt provides information of quantity, rate, net, VAT rate, VAT, gross). The traveller needs to give information on the project and work stage, which stage the project is at and finally the types of expenses list.

In the travel safety context, S-TA1 mentioned the organisation has a transport and safety strategy. This strategy applies to the transport and work vehicles by the organisation personnel and contractors working on behalf of the organisation. In common with all work activities, the use of transport and work vehicles needs to be risk assessed as part of the risk assessment of the work for which these vehicles are to be used.

All of the organisation's offices are leased and so the overall responsibility for the planning and maintenance of traffic routes rests with the owner or facilities manager of the offices. However, this does not relieve the organisation of its over-riding responsibilities to its employees, visitors, contractors and others to ensure that safe traffic management systems are in use at their offices.

According to S-SA1, the current business travel process is working very well. The organisation uses sustainable travel which is its prime objective. The organisation also manages a reasonable amount of cost of travel by booking in advance (booking trains). Booking takes very little time and it is easily done by individuals. People are flexible with the cost of booking first class tickets; there is no pressure for last minute bookings. According to S-PM1, "*when the traveller fill up the expenses form they have to fill the mode of the travel and our expectation is they are using the sustainable travel or using alternative (virtual Meeting)*". In terms of cost, S-SA2 mentioned cost is not very specific in the document but it is important.

At the Implementation level staff also agreed that the individual booking system works well. According to S-NU, the traveller would like a very simple procedure with fewer forms, i.e. they have a company credit card that they can put all costs on, log onto a website which would list each cost incurred, match with a reference number they would write on their receipts, print off and send to a finance officer with the receipts.

8.3.3 Outcome

The turnover for this organisation is approximately £20 million of which the annual business travel spend is £300-350k. The organisation has alternative communication methods so that they can avoid the need to travel at all. If travel is needed then the organisation helps to find the most sustainable way to undertake it. The organisation's targets for internal business travel are: to reduce carbon per km travelled by 10%, continue to encourage use of video conferencing and telephone as opposed to travel, have a series of office-level actions to remind staff of the travel hierarchy, and to use least polluting modes where possible (Staff Travel Survey Results, 2014). Table 8.3 shows modal splits (by km travelled) in 2014.

Table 8.3 Percentage Modal Split (by km travelled) for Case Study Three Organisation in 2014 (Source: Staff Travel Survey Result 2014).

Mode	Internal Business Travel Mode Split (%)	External Business Travel Mode Split (%)
Walking/ Cycling	0.42	0.65
Bus/Coach	0.33	1.55
Tram/Underground/DLR	4.04	6.97
Rail	67.62	52.13
Hire Car/Car Club/ Car Share/Taxi	0.08	3.08
Car(Petrol/Diesel)	27.51	20.38
Air	0	15.23

Table 8.3 shows rail to be the dominant mode for business travel, accounting for over 50% of total distance travelled. Car use is also a popular mode of transport. Travel by rail is the most utilised from of transport for both internal and external business purposes.

This service organisation undertakes a travel survey each year to identify the modes of transport that staff used for internal and external business travel. It has been found from the 2014 survey that the mode choices have changed from previous years in several ways:

- Car use has increased by 8.75% overall across all travel purposes, predominantly on business travel. Over 27% internal business travel journeys are made by this mode;
- Car sharing, the car club and hire car usage have decreased by 14%, from 16.52% in 2013 to 2.32% in 2014;
- Bus and coach use has risen slightly by 0.34% overall, with the change most evident on external business travel;
- Tram/Underground/DLR use has increased by 1.78% overall;
- Rail has increased on commuting journeys, but decreased overall, with a reduced modal share of 6.25% over the year;
- 2014 survey results show a significant increase in use of air travel for external business purposes, from Null in 2013 to 15.23% in 2014, giving an overall modal

share of 9.95%. This helps to explain the significant decrease in overall modal share for the other, more sustainable mode.

The organisation sets realistic targets to reduce emissions in accordance with company policy, based on the previous year's data. Table 8.4 gives the carbon footprint details from 2011-2014

Table 8.4: Total Carbon from Business Travel in 2011-2014

(Source: Staff Travel Survey Result 2014)

Year	Carbon footprint (kg CO_2 pppd)
2014	2.40
2013	3.05
2012	2.04
2011	1.35

The above table shows that total carbon emissions have decreased between 2013 and 2014. Emissions have reduced by 0.65 CO_2 kg pppd for business travel.

Overall, the use of sustainable transport modes in the most recent year has reduced slightly. Whereas in 2013 70% staff travelled on foot, bicycle, by bus or coach, or by rail, in 2014 approximately 65% of staff travelled in those ways. According to S-PM1, "*We don't have lots of travel in the company. We have to travel to our clients, but we cannot control where our clients will be. Nowadays we have more international travel, as a lot of our clients are in Abu Dhabi, and Dubai and that is the reason why air travel is increasing currently. Most of our biggest source of CO_2 is definitely from car travel for national travel*".

8.3.4 Issues

All interviewees from both the Strategic level and the Implementation level mentioned that the current process works well. The reason for this is all interviewees like the self-booking system; that way the travellers know the travel route and times, also that these travel route and times will be convenient for the travellers. According to S-NU "*the process may be time consuming but there is less chance of mistakes if I do it myself*!"

Even though the organisation's staff members are happy with the current process, there are still few changes which could be made and little problems still highlighted. Current issues highlighted by the interviewees are described below:

The current objective is mainly focused on the sustainable travel, however, traveller S-NU raised issues about how the organisation business travel objectives need to ensure convenient travel times (for both travellers and the trip purposes – as the travellers do not want to leave home at 6am to arrive half an hour early for a meeting), travellers need a system that is easy to access (e.g. if the traveller have to get a taxi to a train station etc), and travellers need trustworthy operators (internal/external) and want minimal risk of delays and cancellations.

Reducing the costs of business travel is very important these days, however the policy maker did not emphasise the issue of future business travel objectives, even though all the strategic administrators emphasised the falling cost of travel.

8.3.5 Future of Business Travel

Similar to Case Study Two, in this case study interviewees mentioned different thoughts about the ideal business travel process in the future. At the strategic level, S-PM1, S-SA1, S-SA2, S-SA3 mentioned the current system is ideal, where travellers can go straight online and book the travel. According to S-PM1, this organisation has quite a mature system now and there are only two reasons why this organisation could change the business travel process:

1) if the results start going in the wrong direction and the carbon emissions go up; and
2) if the external legislation changes, if the organisation is required to meet certain targets.

About future objectives, S-PM1 mentioned carbon reduction and business efficiency are the main focuses and ideally everybody recognises the target.

S-SA1 mentioned two types of factor should influence future business travel objectives: the sustainability agenda and the cost of practical recovering from external sources such as discounted travel mode costs. For work-life balance people should manage their time effectively.

At the implementation level, S-NU1 mentioned the organisation must encourage more travel (if this is possible due to cost) for all staff including junior members to develop better relationships with customers and allow all team members to be involved in a project at the development stage – or even the contract pitch stage. S-NU also mentioned the organisation

needs to remember, "*a temporary cost for long term gain. It is certainly a cost when you are pitching for a contract but do not win. However, if you win the contract or are building relationships with customers then it is an investment being able to travel to meet with them face-to-face. It is very difficult to get to know someone over the telephone or internet.*"

S-EU1 however mentioned cost is the main barrier for more face-to-face travel. The directors would probably be very happy to allow all staff to travel more if budget allowed. However, to win a contract the organisation needs to be competitively priced, so if they put their own service cost up so more staff could travel, it is likely the company would not win the contract meaning less income overall.

All interviewees emphasised that the government can help to improve management of the business travel process. They mainly focused on reducing the cost of fuel tax and business travel insurance. Also cheap car parking facilities near to the office were seen as being important and the government can help with it. According to S-NU, "*I am actively discouraged to travel by car and forced to use public transport which is not only expensive but has such a varied timetable. I always travel earlier than I need to 'just in case' I'm late.*"

The interviewees also mentioned that the Government can help with simplifying train fares as it is difficult to book meetings between 10:30-15:30 during non-peak travel times. According to S-SA1, "*we struggle with the rail fare. Maybe also other originations face the same; the government can simplify what is there*".

S-NU mentioned train delays are also a concern. Delays and cancellations mean the traveller can arrive too late which looks like poor planning on the travellers' part to the customer and can result in lost business. If the traveller could trust the trains to always be on time this would not be an issue.

8.4 BPM FOR CASE STUDY THREE

This section gives graphical representation of the business travel process management of the Case Study Three organisation by developing IDEF0 process models. The reason for selecting IDEF0 method has been described in Chapter Three.

Node A0 Top-Level Activities for Managing Business Travel Process (Strategic and Implementation Levels)

A0 is the context diagram and represents top-level activities that give a basic view of managing business travel process (refer to Figure 8.5). In this process the organisation works with inputs such as business trip data, purchase requisition data and travel need to produce outputs or project outcomes like future opportunities, project documents, fulfilled business goals, and reimbursed expenses. This activity is carried out with some project constraints at the strategic level, such as: project time, company guidelines, industry standards, and business travel policy objectives. The business organisation carried out this process by using mechanisms such as internal booking tools, finance manager's duty to reimburse the claim, line manager's approval, travellers participate. The business process model aims at proposing developments to the current model to maximise its performance and deliver value to its users.

Node A1 Managing Business Travel Process (Strategic and Implementation Levels)

Node A1 (Figure 8.6) represents the current process of business travel management for Case Study Three. This is a hierarchical process of the total business travel management system by the organisation. In general, this means that establishing travel needs, booking travel, undertaking travel, and settling travel expenses and carbon calculations are the main processes. These processes are interlinked and IDEF0 diagrams endeavour to represent the relationship between each activity and overall information in the system.

Before undertaking any business travel, the organisation establishes the need for travel and obtains the line manager's approval, however this process is done verbally and there is no written approval needed before travelling. This system is controlled by the organisation policy, time and budget.

After making the decision, the next activity is to book travel. This activity is done by the traveller to book travel directly online/Expedia using a company credit card or traveller's credit card. If any assistance is needed, the travel plan coordinators support the travellers. The traveller reports the mileage they undertook to the finance department and an expert/ consultant reviews the travel process and calculates the carbon emissions. Annual surveys by all staff, however, help to monitor the changes in carbon emissions and mode share. When the traveller uses their own credit card they can claim the money back with the line manager's approval and through the finance department via completing an online expense

claim. For reimbursement, the traveller needs to fill in an online form, which is used internally.

IDEF0 Notation

Control

Input → Activity Process → Output

Mechanism

The IDEF0 notation consists of ICOM (Input, Control, Output, Mechanism) these four categories.
Input: Transformed by activity or process.
Control: Dictate and constrain under what conditions transformations occur.
Output: Created as s result of activity transformations.
Mechanism: Describe how the activity is to be carried out (resource, process etc)

Time

Business Relationship

Business Travel Policy Objectives

Budget

Business Trip Data → Manage Business Travel → 0 / A0

Purchase Requisition Data →

Online Booking Tools

Travellers

Finance Managers/ Line Managers

Sustainable Travel Modes

Future Opportunities

Travel Plan

Fulfil business goal

Reimbursed expenses

| NODE: | A0 | TITLE: | Managing Business Travel Process | NO.: | 0 |

Figure 8.5 Top-Level Activities for Managing Business Travel Processes Strategic and Implementation Level (Ruikar *et al*., 2003)

| NODE: | A1 | TITLE: | Managing Business Travel Process, all Levels. | NO.: |
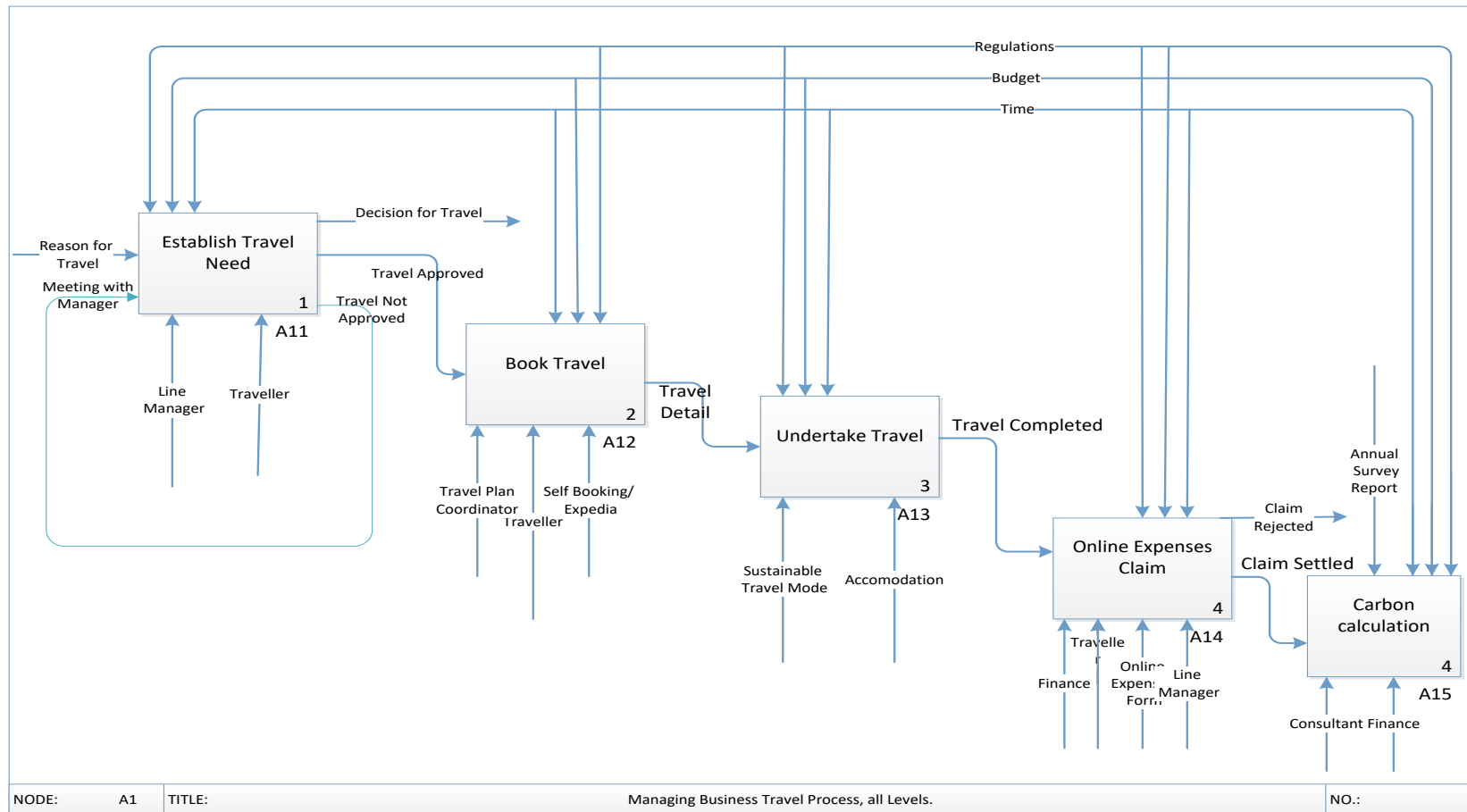
Figure 8.6 Managing Business Travel Process, (Strategic and Implementation Level)

Node A2 Individual Booking (Implementation Level)

The booking process is done by travellers at the implementation level. The organisation encourages travellers to use virtual meetings to save time and cost, but where face-to-face travel is needed the organisation strongly recommends travellers to use the sustainable travel mode if possible. Travellers mostly prefer to book their own travel. Travel plan coordinators support travellers if any assistance is needed. The IDEF0 diagram (Figure 8.7) shows that while online booking, after obtaining the line manager's approval the travellers directly contact the service providers (hotels, car rental), and book air/rail tickets online. Some travellers (around 20 who travel frequently) can use company credit cards to book travel [S-SA1]. In case of the cancellation of any meeting abroad the travellers do not get a refund. In this case the organisation or often the traveller loses their money. Each traveller has to create a personal file to keep a record of their travel (where they save all the VAT receipts, invoices); these documents are later archived in the organisation by the accounts department.

Node A3 Undertake Business Travel (Implementation Level)

Travellers undertake business travel at the implementation level. In this organisation, travellers use three types of modes to travel; air, public transport and car. Figure 8.8 represents the travel undertaking process.

| NODE: | A2 | TITLE: | Individual Booking (Service Organisation) | NO.: |
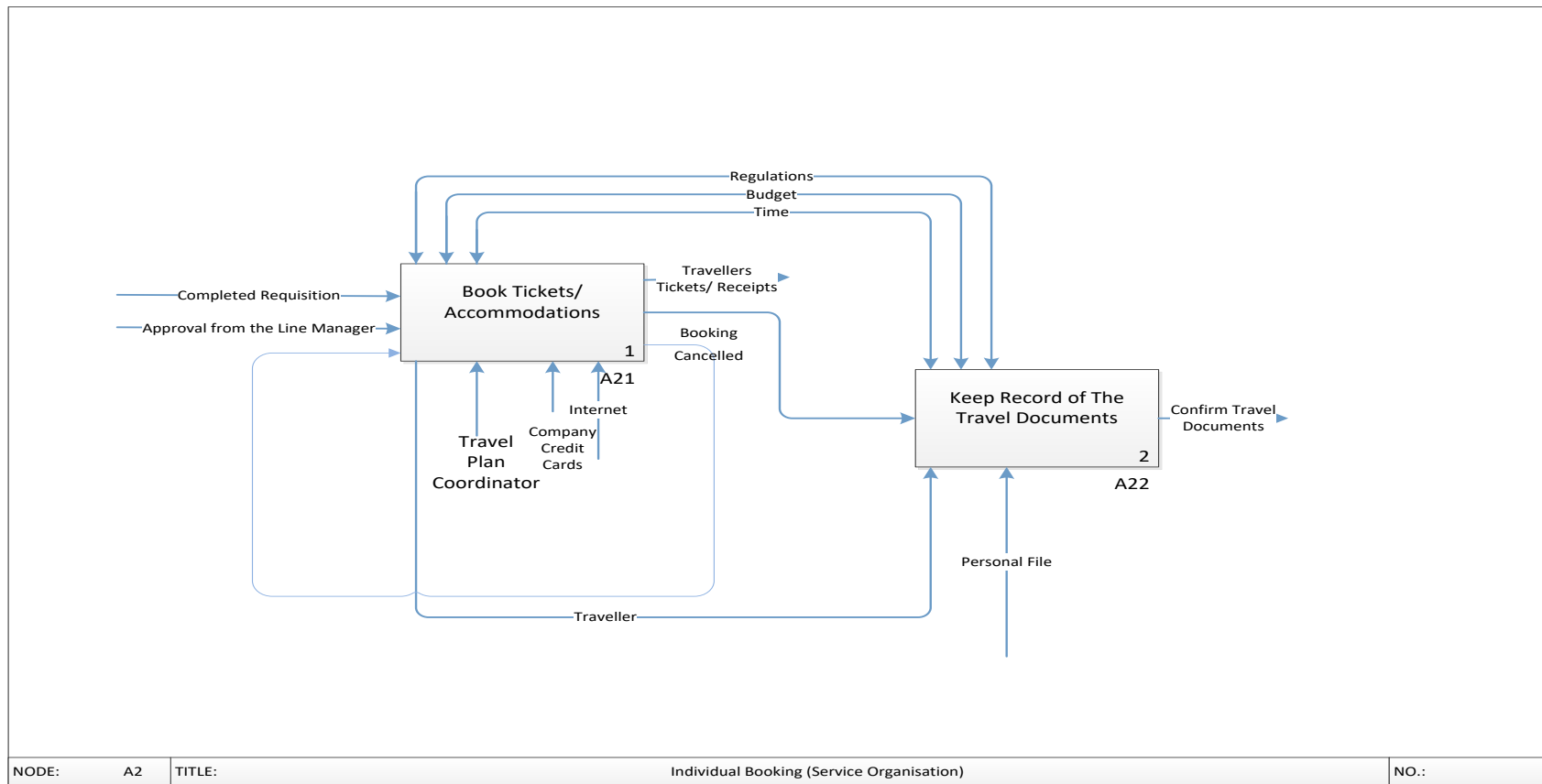
Figure 8.7 Individual Booking (Implementation Level)

NODE:	A3	TITLE:	Undertake Business Travel (Service Organisation)	NO.:
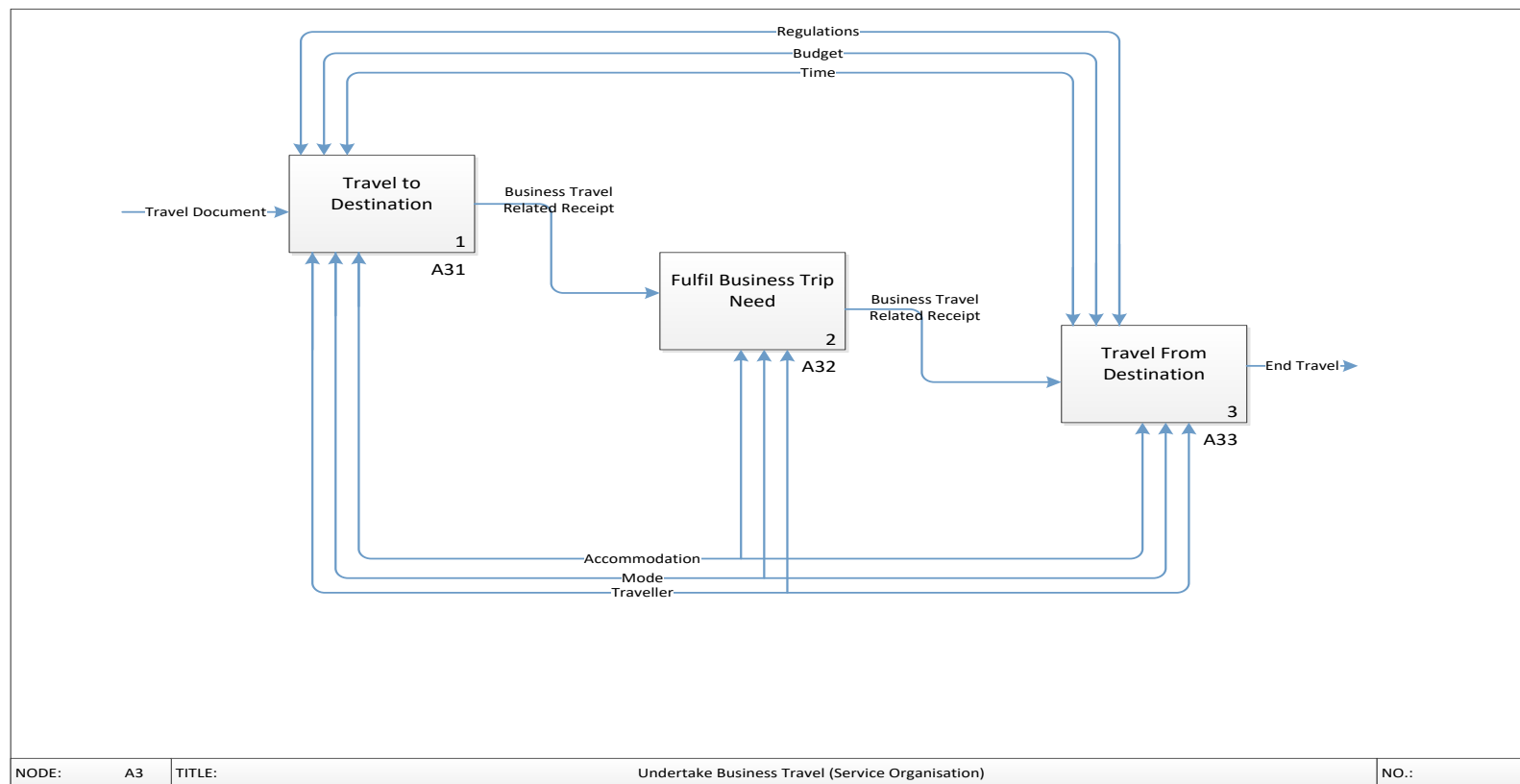
Figure 8.8 Undertake Business Travel (Implementation Level).

8.5 ANALYSIS OF CASE STUDY THREE

8.5.1 Viewpoints of Strategic and Implementation Levels

This case study has analysed the different viewpoints from policy makers, strategic administrators, tactical administrators and some travellers. The lessons learned from the viewpoints are shown in Figure 8.9 (a-d).

Business travel is widely believed to be the second largest contributor to a corporation's emissions (Davis and Armsworth, 2010). However, not all businesses are driven purely by the desire to reduce carbon emissions (Roby, 2014). It is evident that Case Study Three's main business travel objective is to reduce carbon (Figure 8.9a). To save carbon emissions this organisation influences travellers to use more public transport for domestic travel instead of cars. Hence, it has been found in literature that public transport providers and public transport information service providers face the challenge to influence people's attitudes towards using public transport (Farag and Lyons, 2012). The Case Study Three findings reveal that even though the organisation can save money by encouraging the use of public transport and it helps to reduce an organisation's carbon footprint, there are some barriers like serious delays and cancellations. Farag and Lyons (2012) suggested that access to public transport information could in certain circumstances increase the use of public transport by organisations. Figure 8.9b highlights these issues.

Interviewees in case study three mentioned that in their organisation most business travellers are male who travels frequently. This finding is also reported in the literature (Collins and Tisdell, 2002). However, the interviewees in case study three mentioned, if it is compulsory for any position to undertake travel the female travellers also have to take part for the benefit of the organisation and the organisation confirms all the needed securities for all travellers.

Figure 8.9c shows that booking travel directly via the internet does not give any refund of the tickets in case of cancellation. Heung (2003) noted that travellers can gather information about travel products and services on the internet; however the actual distribution of goods and services is likely to be affected by the internet, especially for digital goods like electronic tickets. Trust and social contact are the main concerns for many consumers, however changing bookings and cancellation of journeys by the service provider is common with travel booked via internet (Heung, 2003). The organisation also faces this problem while booking tickets online.

Figure 8.9d shows how less use of tactical administrators saves time and cost. "*Administrative overspending is a wasteful activity for the benefits of office holders*." (Sjahrir *et al.*, 2014, p.166). It is evident in Case Study Three that less use of tactical administrative staff saves time and cost. Higher administrative expenditure is caused by a less organised process that has sustainability weakened liability mechanisms (Sjahrir *et al.*, 2014). It is clear that Case Study Three has strong sustainable liability mechanisms as the main objective of the organisation is sustainable travel which is cost and time effective.

Strategic Level

Policy Maker's Viewpoint

The main business travel objective is sustainable travel and reduces carbon. We do what should our client do. We have to trade off time and cost, sometimes we choose public transport, as people can work on train even though train is expensive.

Strategic Administrator's Viewpoint

Prime objective is sustainable business travel and reduce carbon.

Implementation Level

Tactical Administrator's Viewpoint

The main business travel objective is sustainable travel in terms of cost, time and carbon.

Traveller's Viewpoint

Organisation encourage to undertake travel in most sustainable mode.

Lesson learnt: Reducing carbon is the main objective and get more importance than reducing cost

Figure 8.9 a. Reducing carbon is the main objective and get more importance than reducing cost.

Strategic Level

Policy Maker's Viewpoint

The organisation encourages the travellers to use public transport to have less carbon emission. 10 years ago majority of the business travel was done by car, but now majority of the travel is by public transport.

Strategic Administrator's Viewpoint

Using public transport is one of the most sustainable mode.

Implementation Level

Tactical Administrator's Viewpoint

Travellers are encouraged to undertake business travel using public transport as it is more sustainable.

Traveller's Viewpoint

Using public transport often cause serious delay and cancellation and as a result the organisation lose business

Lesson learnt: Using public transport can save the carbon emission but this can cause serious delay and cancellation

Figure 8.9 b. Using public transport can save the carbon emission but this can cause serious delay and cancellation.

Strategic Level

Implementation Level

Policy Maker's Viewpoint	Strategic Administrator's Viewpoint	Tactical Administrator's Viewpoint	Traveller's Viewpoint
Traveller does not book ticket until they confirm but in case of cancellation the organisation do not get any refund.	This organisation always has to cancel the meetings and schedule the meetings. Travelers do not get refund on cancellation.	Because travel is booked directly by the traveller without TMC there is no system as refund money on cancellation.	Same viewpoint as tactical administrator.

Lesson learnt: Booking travel directly via internet does not give any refund of the tickets in case of cancellation

Figure 8.9 c. Booking travel directly via internet does not give any refund of the tickets in case of cancellation.

Strategic Level

Implementation Level

Policy Maker's Viewpoint	Strategic Administrator's Viewpoint	Tactical Administrator's Viewpoint	Traveller's Viewpoint
It is difficult to explain to the administrative tactical when is the travel if the travel cancel few times, also organisation save cost by not employing too many staff.	Same viewpoint as policy maker	Tactical administrators are only there to support travellers, however all bookings are done by the travellers. Thus the traveller can book travel quicker.	If the traveller book the travel themselves there is more chance of having less mistakes, as traveller is confident what they need and do not need to explain other person. It also save time.

Lesson learnt: Less use of administrative tactical staff saves time and cost

Figure 8.9 d. Less use of administrative tactical staff saves time and cost.

The findings and analysis of Case Study Three helps to identify some strengths and weaknesses of the current business travel process management in the organisation. These are described below:

8.5.2 Strengths in Case Study Three

The strengths of the current business travel process of Case Study Three are identified and listed here. This organisation's main objective of business travel plan is sustainable travel. The users are satisfied with the current process. The organisation is not looking to change the process currently and consider they have good business travel practices. The strengths of the current business travel process of this organisation are as follows:

- The organisation has a sustainable policy for business travel;

- Travellers are encouraged by the organisation to use virtual travel and the sustainable mode;

- No tactical administrators complete travel requests. In this case the organisation saves money by not appointing any tactical administrators. Also this process is quicker;

- The organisation allows the use of business class air travel. So for long haul journeys travellers are comfortable enough and they can stay refreshed to attend any next day meetings; and

- Before travel, the traveller has an up to date risk assessment. It helps ensure a safer journey for the traveller.

8.5.3   Weaknesses of the Current Process in Case Study Three

The organisation has a sustainable business travel policy and the organisation tries to minimise the carbon foot print and cost of business travel, also the users are satisfied of the current process. However they mentioned some down side of the process. These down sides of the process have been listed here:

- Because travellers book travel online, in case of any cancellation the traveller does not get a refund. In this way the organisation loses the cost.

- While taking travel decisions, the travellers get verbal approval from the line manager, however it is better to have written approval and keep records to be

reviewed by the policy makers to ensure that no unnecessary travel has been undertaken.

8.6 SUMMARY

This chapter introduced the findings of Case Study Three. Specifically, it presented the findings mainly based on their business travel process at two levels: Strategic, and Implementation.

The case study findings revealed that the organisation business travel policy mainly focuses on sustainable travel to reduce carbon. The organisation tries to reduce business travel to minimise the cost and carbon emissions. In this organisation travellers book their own tickets directly online. The organisation has an online self-booking process only to reimburse money. The policy makers believe this process helps the organisation to book travel quicker. The reason for this is that meetings with clients often need to be cancelled or re-scheduled and it is very hard to explain this process to tactical administrator to book travel so the traveller books their own travel when needed. Also this organisation does not have lot of international business travel so use of a TMC is not necessary for this organisation.

8.7 SIMILARITIES AND DIFFERENCES BETWEEN ALL CASE STUDY ORGANISATIONS

Chapter Six, seven and eight briefly described the findings of the case study organisations. This section combines the similarities and differences between these case study organisations. Table 8.5 highlights the differences and similarities that has found.

Table 8.5 Case study one, two and three organisation's similarities and differences to manage business travel

List of characteristics	Case Study 1 (CS1)	Case Study 2 (CS2)	Case Study 3 (CS3)	Comparison
Presence of business travel policy.	Business travel policy present.	Business travel policy present.	Business travel policy present.	CS2 and CS3 have sustainable travel policy. CS1 still is improving to make the policy sustainable.
The organisation uses TMC.	Uses TMC	Uses TMC	Do not use TMC	CS1, CS2 are large organisations so they need TMCs but CS3 is small organisation and does not need TMC.
Business class air travel	No business class travel	Allows business class travel	Allows business class travel	CS2 and CS3 organisations are aware of travellers comfort effect the quality of the work.
The organisation is focused on a cost effective business travel management process.	Focus on cost effectiveness	Focus on cost effectiveness	Focus on sustainable travel	CS1 and CS2 organisation mainly focus on cost effectiveness, CS3 however focus on sustainable travel.

Awareness of risk assessment	Undertakes risk assessment	Undertakes risk assessment	Undertakes risk assessment	In CS1 organisation not all travellers and tactical administrators are aware of the risk assessment before travelling a remote area and often travel without risk assessment documented. The CS2 and CS3 organisations do not travel without risk assessment.
Communication between strategic level and implementation level	Lack of communication	Good communication	Good communication	In CS1 organisation there is a lack of communication between strategic level and implementation level. CS2 and CS3 have more organised way to communicate with strategic level and implementation level.
Reporting carbon emission	present	present	present	CS1 and CS2 both organisations find it difficult to report carbon emissions per year. CS3 is fine to report the carbon emissions.
Using SAP system to book travel	Not using	Using	Not using	CS1 organisation does not use SAP system but prefers to use it. CS2

				organisation uses SAP system and CS3 does not use and not interested to using it in the future as it is a small organisation.
Expense claim system	easy expense claim system	Complicated expense claim system	easy expense claim system	CS2 organisation has complex expense claim system because of SAP system, whereas CS1 and CS3 organisations has quicker and simpler process.
Use of virtual meetings	Allow and promote	Allow and promote	Allow and promote	All organisations focus on using technologies to replace travel via virtual meetings besides essential face to face meetings.

CHAPTER NINE

FRAMEWORK DEVELOPMENT

9.1 INTRODUCTION

The purpose of this Chapter is to explore the components of the conceptual framework of business travel process management (BTPM) and how these can be applied in an effective way within organisations. Chapter One, Section 1.2 highlighted the role of business travel process management. The Chapter One, Section 1.7 defined the conceptual (BTPM) framework. The methodology chapter (Chapter Three), Section 3.5 discussed the origin and method of the conceptual (BTPM) framework.

This chapter is divided into five sections. Section 9.2 gives a background and development of the conceptual (BTPM) framework. It includes the rationale behind its development, its aim and objectives, the key principles adopted within it, and finally, it looks at the ways businesses can use it to achieve their goals. Section 9.3 discusses how to understand and use the framework. Section 9.4 outlines the six phases of the framework, including the outputs of each phase and the main activities. Finally, Section 9.5 summarises the points explored within this chapter.

9.2 BACKGROUND AND DEVELOPMENT OF THE FRAMEWORK

9.2.1 Rationale for the Development of the Framework

The outcomes from the previous chapters of this thesis, including Chapter Two (review of previous literature), Chapter Four (scoping study research on business travel), and chapters five to eight (survey-based research and case study analyses) show that organisations are facing several problems regarding the management of their business travel. The outcomes also show that there are no structured processes in place for them to follow to the business travel process.

In consideration of this, some issues arise because different organisations manage their business travel using different methods. Thus some organisations have *centralised* processes, whereas others have *decentralised* processes. Case Study One (Chapter Six), for this research, has a *decentralised* process. Case Studies Two and Three (Chapters Seven and

Eight respectively) have centralised processes. The case studies were selected to understand and study both centralised and decentralised practices. However, all organisations have some issues related to business travel process management (see Chapters Six and Seven).

Previous studies have found that business travel/tourism-related frameworks and other models are some of the most important elements that influence business trips and how they are taken (Gustafson, 2013; Swarbrooke and Horner, 2001)), (Expert 10, senior member of large international governmental organisation). Specifically, previous empirical research on business travel process management has investigated the control and commitment of management and human resource variables related to job design, work organisation, employee contribution, training and learning, managerial supervision, review of employee performance and compensation/rewards (Gustafson, 2013; Holma, 2012; Lyons, 2013; Ramsey *et al.,* 2011; Snepenger and Milner, 1990). At present, there are few comprehensive processes or frameworks to manage business travel. For example, a framework has been developed by Transport for London (TfL) (2013) for sustainable business travel. It looks at five stages for developing a business travel strategy. However, it should be noted that there are two key limitations with this framework. Firstly, it does not explore any specific job roles responsible for any actions the framework requires; and secondly, it has not been developed in an academic field that can give robust underpinning. When a policy is developed by a policy maker it is important to highlight which part of the policy will be applied by whom (Fischer, *et al.*, 2007). Thus the policy can be applied and practised efficiently and in a structured manner. Academic research has some natural affinity and robust underpinning that may help business organisations to develop ideas and analysis.

Business travel is now a dynamic marketplace where fares and rates are linked to demand and prices are changing constantly (Ramsey *et al.,* 2011). Today, travel management requires higher levels of management care (Gustafson, 2012). Time is also an issue for managing business travel because today's consumers are more focused on time saving and are more likely to access a greater view of product information (Heung, 2003).

Research undertaken by Hensher (2001) found that when looking at types of travel, travel time and travel cost can come under one of four possible categories:

a) More expensive and faster;

b) More expensive and slower;

c) Less expensive and faster; and

d) Less expensive and slower.

Yet, there is more complexity to this than just time and cost of travel. The business environment has added layers of processes and controls. The results presented in the preceding chapters of this thesis, particularly from the survey research (Chapter Five) and case study analysis (Chapters Six, Seven, Eight), show that there are now many more stakeholders involved, each with a valid interest in the company travel programme. These stakeholders may include:

- Finance;
- Procurement;
- Human resources (HR)/Travel managers;
- Information technology (IT);
- Individual ravellers;
- TMCs; and
- Legal executives
- Hotels/Providers.

With all these stakeholders and the variety of distribution channels it is necessary to simplify the business travel process to manage travellers. However, at present often the various business travel concerned stakeholders have to deal with pressures related to hierarchy and authority. For example, Gustafson (2013, p.28) raised the issue as follows: "*Travel managers did in fact often have a lower hierarchical position than many of their frequent Travellers. This ambivalent managerial position sometimes made it difficult to enforce control-oriented strategies and might, at the same time, reinforced the desire for more control precisely because the mandate to exercise control was perceived as a recognition of the travel manager's professional status*". It is for this reason that the business travel management process needs to be related to the relevant hierarchical positions and that all users need to follow the business travel policies accordingly. Thus business travel stakeholders need an effective framework for understanding how to manage and control the process.

Travel manager (strategic administrators) is a role that is common in organisations. Holma (2012) states that travel managers are mostly found in relatively large organisations and their roles are to develop and implement a travel policy; cooperate with TMCs, negotiate agreements with important suppliers; standardise payment routines; collect and analyse travel statistics in order to monitor travel behaviour; and communicate and gain support for

managing business travel within the organisation. A dynamic and very complex activity like managing the business travel process can be difficult for just one or two individuals, e.g. travel managers or the human resource department of any organisation, as opposed to a team working between all the stakeholders. Usually, a team of people is required to allow an organisation to incorporate a framework or adopt a systematic approach that can control the business travel process management for the organisation.

According to Swarbrook and Horner (2001, p.39), "*people involved in purchasing in the corporate sector can have a wide variety of different job titles and may have received little or no formal training in business travel*". A framework was needed to be designed that embeds training and guidance to not only the travellers, but also to the travel management teams who undertake the management process. This will be a holistic approach to the process. Each organisation has individuals or a dedicated team who are involved with managing business travel. If any organisation does not have a dedicated team they can train the individuals who are managing business travel for the organisation. Throughout this thesis no evidence has been found from the review of previous literature or from the survey/case study analysis of this research that confirms that organisations at present are using a holistic approach where the organisation has a structured process to train travel managers, travellers to undertake and manage business travel.

Organisations are aware that if they wish to control the cost of business travel, they need to start by focusing on changing the travel booking process. If there is no set travel booking process in place, it is likely that employees will choose to travel by the most expensive and quickest modes for comfort and convenience. However, there are many other things which are inter-related with the business travel process management, e.g. whether the business travel is necessary or not or whether the travel can be replaced by virtual meetings. There is always a cost associated with business travel but it is up to the organisation to decide whether other benefits outweigh this cost. For example, sending an employee to meet face-to-face with international customers would generate travel and accommodation costs, but the effort made to travel could help build better relationships with customers, thus generating more business in the long term.

In order to monitor costs, organisations need to develop a business travel policy and follow the policy accordingly. Organisations need to educate their employees about the new policies and provide them with the appropriate training to ensure that they undertake the business

travel process successfully. These processes need to be monitored and reviewed regularly and any areas for improvement highlighted. This is all part of the role of a conceptual (BTPM) framework.

Looking in more depth at what the conceptual (BTPM) framework is, the framework is a defined process for the business organisations to manage their travel processes. This framework has been designed to follow a process that utilises an intuitive automated self-booking service. This automated self-booking service can save time by eliminating the process of using tactical administrators. Yet, the booking service is still controlled and monitored by the line managers and strategic administrators of the organisation.

This framework also allows the organisations to select the appropriate TMCs and use them. Previous research undertaken in this area has found that internet-based booking services are not always trustworthy because of the risks associated with inputting security/sensitive information; network security; quality of information about purchase choices; difficulties in navigating the internet; limited offerings on individual sites; and disappointment linked to poor customer services (Gustafson, 2013; Heung, 2003; Weber and Roehl 1999). Findings from these studies suggest that the development of electronic commerce in the travel industry allows travel suppliers to reduce their overall costs. An organisation can have disintermediation or can bypass TMCs (Heung, 2003), and can monitor the staff usage and prevent potential abuses of the travel policies in place (Sigala, 2007). However, according to Heung (2003, p.371), "*despite the growing importance of internet booking, there is a general lack of information on: how travellers use the internet for information, booking and purchase of travel products and services; factors influencing internet usage rates; relationships between demographic characteristics and the use of internet and internet usage differences among travellers of different countries*".

The survey and case study analysis results presented in Chapters Five, Six, Seven and Eight highlighted that organisations are using TMCs for their 24-hour duty of care, and for the extra security while booking and undertaking business travel. The framework (Phase Three) recommends using allocated TMCs to book travel more efficiently and in a secure way. If over time a secure internet-based self-booking tool is developed and used world-wide, the organisation can adopt this system and eliminate the use of TMCs. Finally, the framework also provides a step-by-step method of business travel process management from the initial

point at which a policy is developed, to implementation, monitoring and evaluation processes thus giving a holistic approach to business travel management.

9.2.2 Factors that Informed the Development of the Framework

The aim of this chapter is to show that there is still a gap between the identification of the need for a more integrated business travel process management approach and a framework that illustrates such an approach. To develop a framework, issues and potential barriers are identified and analysed to allow a solution to be designed for a structured business travel process management.

Before beginning to design a new conceptual (BTPM) framework, it is important to acknowledge that business travel processes must be constrained by policy (Enoch, 2012). Unplanned business travel is an on-going problem and creates an adverse impact not only on organisations but also on society more broadly (Guizzardi, 2005). It is also important to note at this point that business travel utilises mechanisms that are measurable including 'tools and technologies' (Hensher, 2001; Law and Bai 2008; Ramsey 2011) and 'people' (Gustafson, 2012; Gustafson 2013). Consequently a new conceptual (BTPM) framework needs to be designed around these important focuses.

An ideal BTPM framework needs to identify the reason for travel, the traveller's objectives, needs, preferences and constraints, and the right way of booking travel (Gustafson, 2013). Some experts in this research field (see Chapter Four, Section 3.4.5) have looked at the use of TMCs and identified how they help an organisation with bookings. However, the TMC has to be efficient and needs to have appropriate website display tools for travellers to check which booking they need.

The organisation itself needs to have either an internal or external expert travel consultant, and/or finance manager to support the travelling employee with the risk assessment, advice on taking travel insurance and to check the TMCs performances. Finally, the organisation needs to have a suitable method to monitor travel costs and management fees.

The holistic framework that was developed in this research is concerned with the following aspects:
- The framework needs to be user friendly and rationale for it to be adopted in an organisation would need to be explained to those who will be impacted by it, as

changing the regular practice of business travel will be difficult and people do not like to adopt new changes;

- The framework needs to explain the role of each department involved with the BTPM;

- The framework must outline the role of policy makers, strategic administrators, line managers, external/internal consultants, TMCs and travellers;

- The framework needs to identify an easy way to choose effective communication channels for the organisation. Therefore the four phases of the activities must be interlinked with the highest level of communication between all types of stakeholders, these are: agenda setting, process formulation, process implementation, evaluation.

- The framework needs to allow an option to identify and assess the need for travel as sometimes the time taken for travel is not needed, or can be replaced by virtual meetings;

- The framework needs to be designed in a way that will allow an organisation to operate with lower costs, and utilise convenience and quality of service;

- The framework needs to support a simple a booking system, which is easy to understand, apply and maintain. To support this the framework needs to encourage employers to undertake market research about best available booking system;

- The framework needs to support the organisations in preserving its employees' safety; and personal security; and

- The framework needs to encourage an organisation's willingness to bring in stricter policies/governance around travel by evaluating and modifying the process in light of governmental policies.

9.2.3 Aim and Objectives of the BTPM Framework

The various aspects discussed above (Section 9.2.2) for a holistic framework help to identify the aim and objective of the BTPM framework. The aim of this framework is to provide an enhanced system to manage and develop business travel within organisations. For the framework to be effective, five objectives are in place:

1) To provide a sequential approach for developing a business travel management policy;

2) To provide guidance for the travel managers to carry out consistent planning and review the process;

3) To uphold a bridge between all levels of staff who are related to the process;

4) To specify the roles and responsibilities in relation to defined activities; and

5) To identify the areas where improvements to the existing process are required and review the effectiveness of the organisation's business travel management process.

If the above objectives are achieved by using the framework, then an organisation is more likely to have staff making cost effective business travel bookings. The framework is designed specifically for the organisation's senior management who are involved with the travel policy development in their organisations. The framework is also useful for informing strategic administrators and line managers who are responsible for managing the business travel management process of an organisation. Thus, this framework is a comprehensive set of instructions which seek to manage the business travel of an organisation. It is also a tool to help achieve the aim of this research, which is to investigate the process implications of business travel within organisations with a view to improving travel practices.

9.2.4 Conceptual (BTPM) Framework Development

The purpose of this section is to define and justify the use of the conceptual (BTPM) framework. The case study analysis (Chapters, Seven and eight) established that an improved process could provide potential solutions to the issues of the business organisations in managing business travel. The research identified some issues related to business travel process management:

- Organisations need to be encouraged to reduce business travel mileage to save cost, carbon and time;

- Organisational staff need to change their behaviour if they are adopting any new policy;

- An easier travel booking system is needed;

- Organisations need good technological support;

- Strong and effective travel management policies are needed;

- Communication between strategic level and implementation level is important;

- Measuring the carbon footprint of business travel is a challenge; and

- Specialisation and convergence are mutually exclusive. For example, one type of traveller may find it much simpler to book their own trip and use modern technology to choose and book hotels, while another type of traveller would look to a third party to book everything for them.

To summarise, thus far in this thesis the steps to improve business travel process management have been explored. Chapter Two (the review of previous research) concluded that to manage the business travel processes effectively, it is necessary to implement a methodology or framework that can support organisations to choose an appropriate process and to use this process appropriately (Hu, 1996). Also it is essential to promote efficient and cost-effective business travel within an organisation (Gustafson, 2012) from individual, organisational and social perspectives. Specifically the outcomes of the literature review (Chapter Two) and scoping study (Chapter Four) summarised that the key business travel issues examined included for the '*individual traveller*': work-life balance, stress, personal security, health, social status, and unnecessary travel. For the '*Organisations*': cost, time, policy, decision making, business travel management processes, Information and Communication Technologies (ICT), sustainability. For the '*Societal Benefits*': reducing carbon emissions to stop environmental pollution. This was complemented by the results of the national survey undertaken in Chapter Five. Finally, the results presented in Chapters Six, Seven and Eight from the case study analysis explored how business travel process management can be improved within UK organisations.

This chapter explores the conceptual (BTPM) framework and highlights areas where improvements can be made based on the results from previous research in this field. Figure 9.1 demonstrates how each stage of this research project (i.e. literature review, scoping study, survey and case studies) informed the development of the conceptual (BTPM) framework.

Literature Review → **Scoping Study** → **Survey** → **Case Studies**

Key Findings:

1. The motivations for organisations and individuals undertaking business travel are not well understood

2. Companies are not always aware of the impacts of business travel on their organisation

3. Congestion leads to delays at work and have a knock on effect on business.

4. Business travel has an impact in work life balance, and family life

5. As alternatives to travel the virtual meeting can be used for business travel but virtual meetings are not widespread due to technological faults, lack of skilled operators and cost of technology installations.

Key Findings:

1. Key business travel issues examined included for the organisations: cost, time, policy, decision making, business travel management processes, Information and Communication Technologies (ICT), sustainability, Corporate Social Responsibility (CSR). For the individual traveller: work life balance, stress, personal security, health, social status, and unnecessary travel.

2. Regarding the future the expectations are that if the economy develops and organisations enter in new business market, then the organisations will employ more people around the world and therefore amount of business travel will increase. There will always be a need to face to face meetings, product deliveries, and marketing factors. Virtual meetings often can be alternatives of face to face meetings, and along with this virtual meetings the mode of travel need to proceed in a controlled way to get maximum benefit of costs and business development.

3. More interrogative systems for booking travel and travel alternatives would help determine what the objective for the interaction with the stakeholder is; what the best means might be to hold the interaction; and whether the travel is the best approach. The use of technology, policy development and making decision about the necessity of the business travel for the organisations need to undertake or determine in smarter way.

Key Findings:
1. Organisation tend to use online self-booking services along with the use of TMCs. Only few organisations fully depend on the TMCs to choose mode, hotel and book travel.

2. Among different types of the department in an organisation mainly Human Resource, Finance and often Sales and Marketing are related to manage business travel.

3. The most common objectives for a business travel to meet tend to relate to improving efficiency and reducing cost.

4. The key factors influencing business travel were trip related factors (cost of travel, cost of accommodation, traveller security and so on) and organisational and employee factors (organisational size, geographical separation of units and so on).

5. Business travel in the future revealed that half of organisations see reducing the cost of business travel having the highest priority, followed by a need for improved decision tools and a desire for less bureaucratic/more flexible process management systems.

Key Findings: 1. Travellers are not aware of the organisations benefits for long run by using TMCs.

2. Need to improve communication in between Strategic Level and Travellers

3. Cost is an important issue and government can help to control it.

4. Carbon footprint measure is a challenge especially when it is self-booking process.

5. Need behavioural change and the management process have to be policy driven

6. Communication in between travellers and managers need to be good

7. Often shortage of staff is a problem Complying with the travel policy is not always possible for the traveller, i.e. while travelling in a remote area.

Gaps that led to scoping study:
Literature suggests that further research is needed on business travel and on how business and governments can be linked to each other to deliver better opportunities and development (Beaverstock *et al*, 2010), Literature also suggested there is also lack of qualitative research on business travel and not much academic research has been previously done in this area (Aguilera 2008).
To fulfil the lack of knowledge on business travel a scoping study was needed.

Gaps that led to organisational survey:
Literature suggested, there is a lack of clear understanding on the benefits and barriers related to organisational business travel (Swarbrooke and Horner, 2001). The scoping study helped to understand about business travel's definition, future need for business travel, however to identify current barriers it was important to undertake questionnaire survey among business organisations.

Gaps that led to Case studies: Survey helped to identify the issues related to the business travel practices in general, however to know the processes in depth case studies were required.

Gaps that led to the Framework: Organisations are focused to changed their business travel booking system and save costs, improve efficiency however, organisations are not using any structured process to identify problems, identify solutions as well as for developing business travel plan/policies. A framework for an overall business travel management process can help the organisation to plan the business travel management more strategically.

Helped to find out widely spread the problem

Recognised the limitation of the current business travel processes

Identified clear evidence of developed practices

Framework of business travel process management

Figure 9.1 Key Findings and Research Gaps.

The results obtained from the three Case Studies undertaken in Chapters Six, Seven and Eight presented three different processes of how business travel is currently managed. All case study organisations have outlined strategic plans and set business travel objectives. Case Study One, however, is looking to change the system and trying to apply stricter policies.

From Case Study One, it was established that many problems were with regards to business travel and numerous issues were highlighted since the business travel policy was updated up until 2009. However since 2010, the organisation focused on booking all travel via a TMC and with a drive to move away from booking travel as individuals. This change process is still on-going [Educational Organisation Travel Plan, 2009; 2010]. The Case Study One results revealed that the travellers and tactical administrators preferred the options of both TMC and individual booking in place at the same time. The complex business travel booking process was also found to be a major problem. Whether the business travel was booked online or by the TMCs it is still questioned by the implementation level respondents. On the other hand, in Case Study One strategic level staff still wanted to use the TMC as it was better in the long run. Literature (Chapter Two) suggested that the TMC role, as an intermediary, necessitates a high degree of communication between corporate clients/travel managers, and suppliers, and that "*all parties also have an interest in keeping down their own costs and/or maximizing their own income*" Gustafson (2012, p. 208). Holma (2012) added that TMCs can assist in monitoring travel policies, detailed travel statistics, security solutions and consultative support. Business travel purchasing is complex for an organisation, as a large number of suppliers (travel modes, hotels) are selling the service whose pricing is constantly changing (Cohen, 2001). Complexity is added by "*the number of suppliers involved in one single business trip with multiple destinations. In companies with large travel budgets, service delivery is generally outsourced to an intermediary, a business travel agency, which simplifies the supply network*" (Holma, 2012, p.103). However, both buyers and travel agents agree that there should be a person in the buyer organisation with the right to make decisions, and to take responsibility of the travel management function (Mayer, 2007; Rose, 2008). According to Fuentes (2011), it would be useful for the organisation's finance department to keep direct or indirect links to the travel agents to be able to access information about their level of efficiency, so that they can make informed decisions about investment or management.

A range of IDEF0 process maps were developed in Chapters Six, Seven and Eight. Case Study One uses a more complex method to undertaken business travel, while Case Study Two uses a very simple process in comparison. The IDEF0 maps helped to picture the whole process step by step in the previous three chapters. Therefore, one set of IDEF0 diagrams (Figures 9.2 and 9.3) has been developed in this section that will demonstrate the tasks that organisations can follow. These IDEF0 diagrams helped to examine existing business travel management processes and led to the development of the final conceptual (BTPM) framework by combining the findings of the case studies. It was found from the case studies results that there are now many more issues relating to business travel rather than simply booking a flight at a published price and reserving a room at a quoted rate. These issues are highlighted in the advantage and disadvantage sections in each case study chapter. Business organisations have had to go beyond the simplicity of this because business travel is now a dynamic marketplace where fares and rates are linked. It was found from Case Study One that the more the organisation book tickets/fares via TMCs, the cheaper deals they can receive. However, Case Study Two seems the ideal business travel process would be a system that can link organisation with TMC where the traveller can see the booking options and choose. According to Gustafson, (2013, p. 25), "*travellers who made their own bookings and clearly saw the different travel alternatives were presumed to take more responsibility than those presented with one or a few options on the phone by the travel agency*".

Figure 9.2 gives the higher level (Node A0) vision of BTPM and IDEF0 notation (Ruikar *et al*, 2003) can be found in the diagram. Here, the controls of the process are a time line for the travel, regulations, budget for the travel and the organisation standard that has been determined. Business trip data and appropriate purchase requisitions must be applied. An automated booking tool to contact the TMC and to get approval from the line manager will be the mechanism; also the traveller, all allocated TMCs, policy makers, and strategic administrators will be considered 'mechanisms'. It should be noted at this stage that in this BTPM framework design, no 'tactical administrator' role has been added. The reason for eliminating this role is because the automated self-booking tool can do this work. All the HR processes will be done by the strategic administrators.
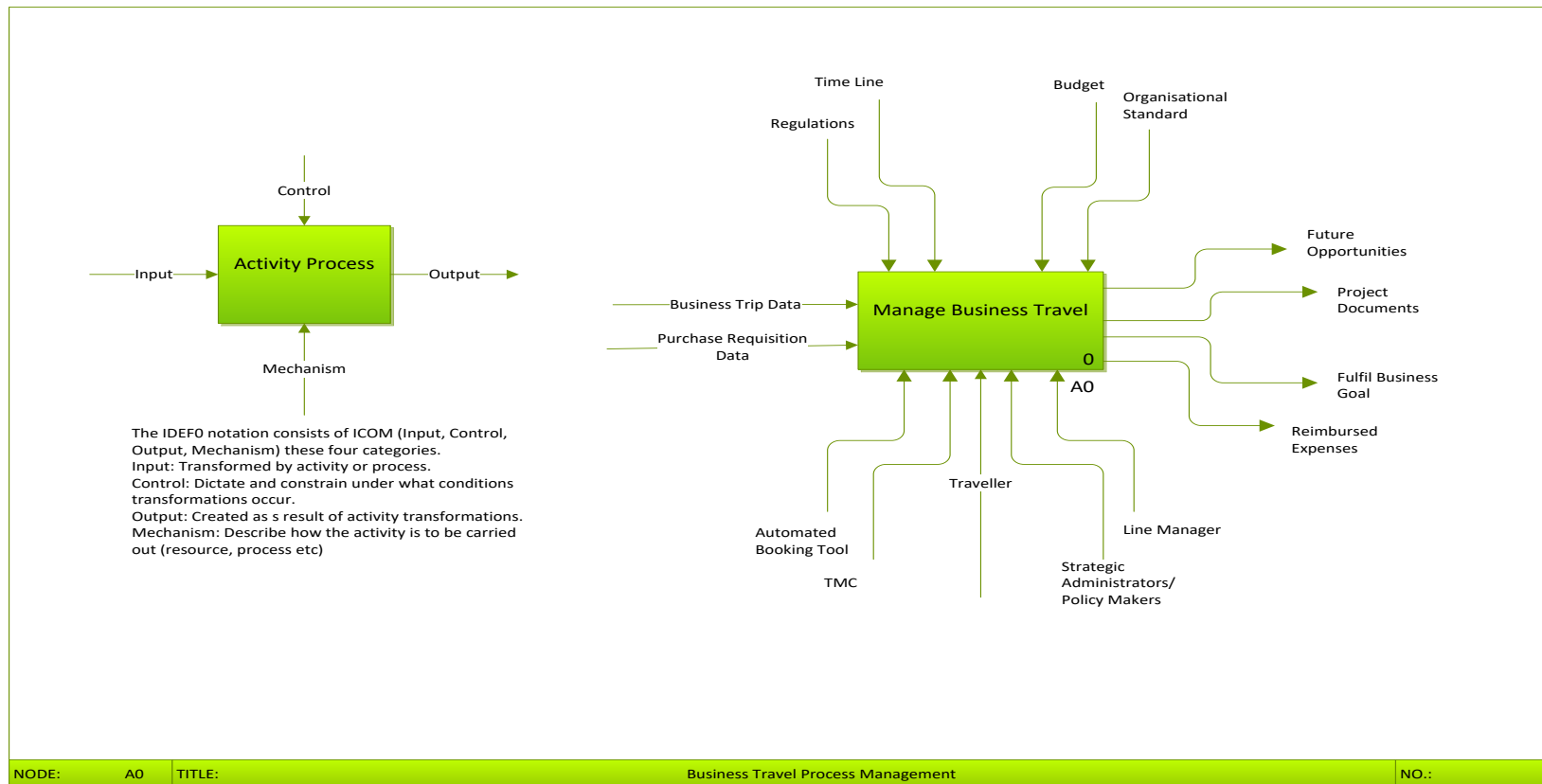
Figure 9.2 IDEF0 for Top –Level Activities for Business Travel Process Management (Ruikar *et al*., 2003)
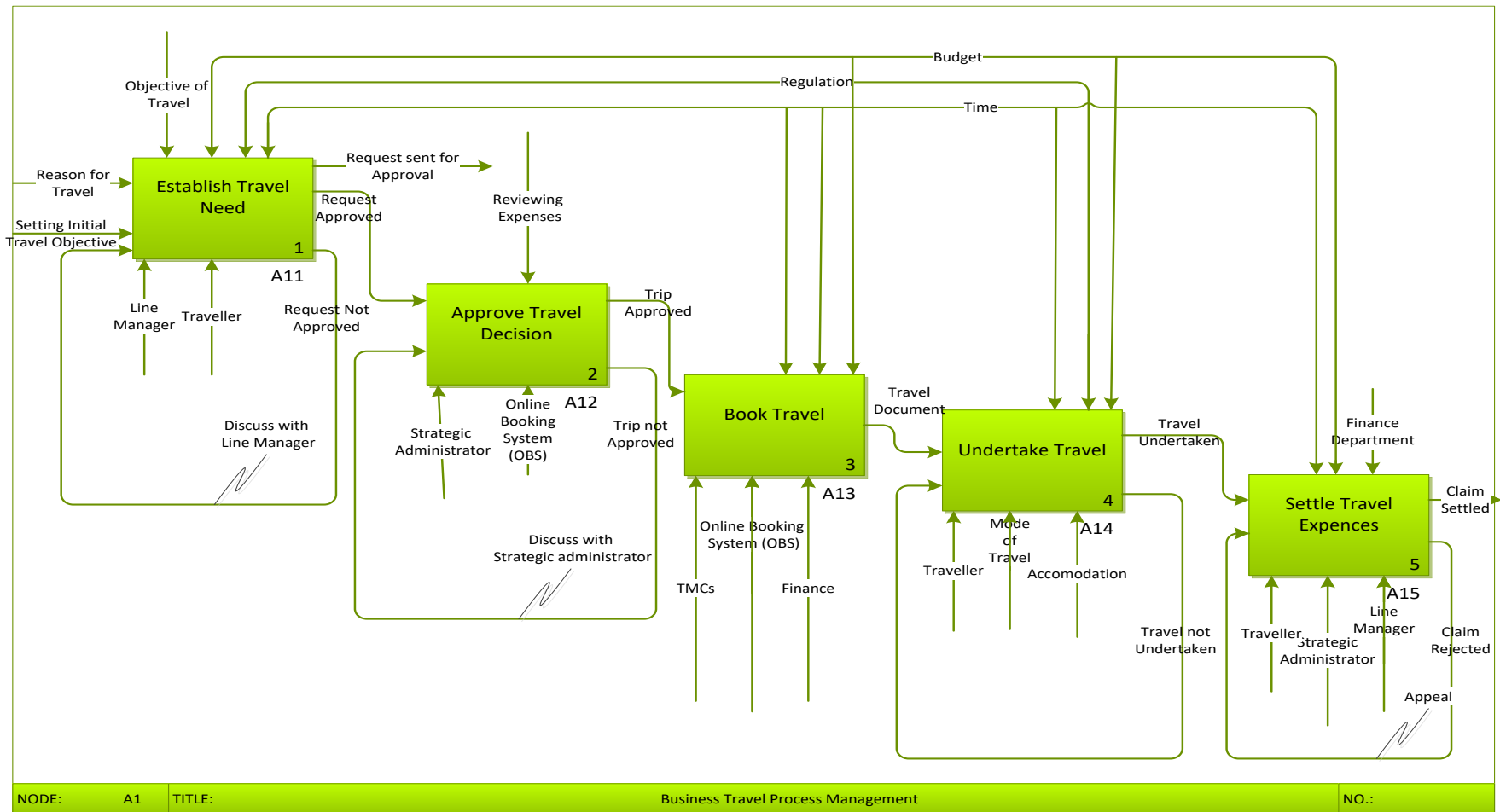
Figure 9.3 IDEF0 for Business Travel Process Management.

To explore the process in more detail, the A1 diagram has been established (see Figure 9.3). Here, five steps are presented to show how business travel is managed and undertaken: a) establish travel need; b) approve travel decision; c) book travel; d) undertake travel; and e) settle expenses. All these stages have input, control, output and mechanism elements.

It is important to mention the application for the travel booking form which is needed to enable the process of travel through online booking software (OBS) system. The reasons for using OBS are that it is easier and quicker than any tactical administrator to book the travel. The OBS helps to connect users directly to the TMCs and also with the line managers and strategic administrators (as needed), and it saves all the information online. Figure 9.4 shows the differences between the typical booking process and the suggested booking process.

Typical booking process

Suggested booking process
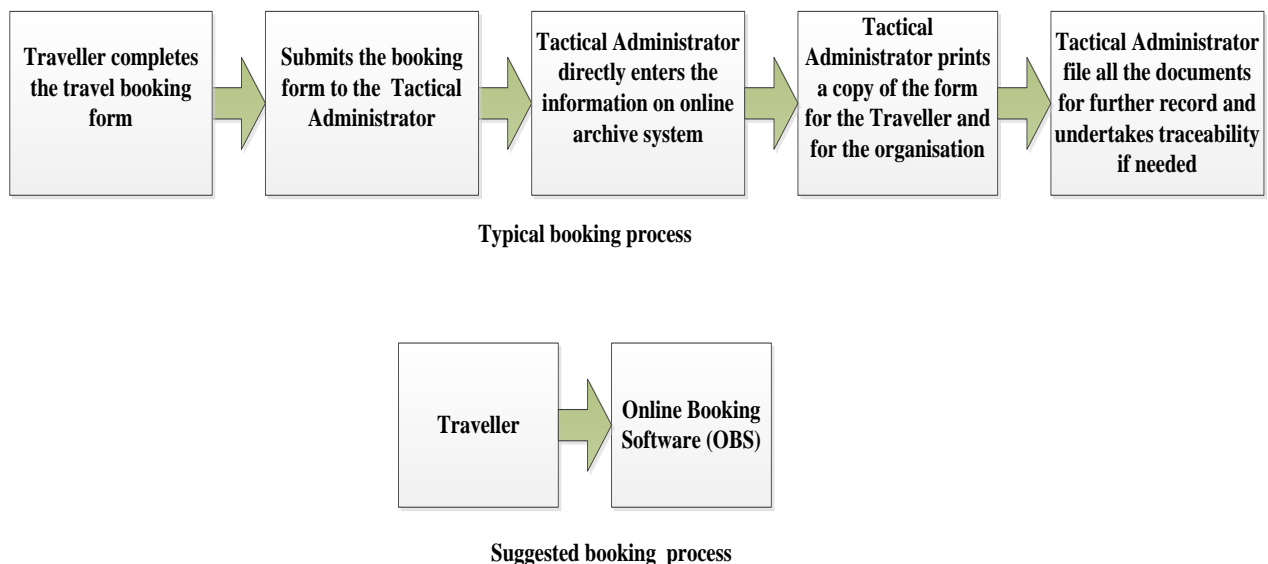
Figure 9.4 Typical Booking Process and Online Booking Process.

Figures 9.4 shows the difference between typical booking process and online booking process. Initially the figure shows how business travel is booked. However, to describe each job role in detail, a connection between each stakeholder and how the business travel process management cycle works, a framework must been developed. A proposed framework for UK organisations to manage their business travel processes will be discussed in the following section.

9.3. HOW TO UNDERSTAND AND USE THE FRAMEWORK

The conceptual (BTPM) framework presents a general approach for organisations to manage their business travel in an improved way. If any organisation struggles to manage their business travel and wants to reduce the resources needed to book travel, they have the option to establish an automated self-booking tool connected with TMCs. This framework can help the organisation to give guidelines how to develop and monitor business travel policy and use the self-booking process connected with the TMC. The control mechanism can help organisations to utilise their available resources by demonstrating at which stage they need to develop, monitor and evaluate business travel policies.

Specifically the framework comprises the following components: factors, roles and responsibilities, phases, gates, activities. Each of the above components of the framework will be explored in turn:

- **Factors**

Factors are the categories used to group the activities within each phase. Factors emphasise the importance of different functions within an organisation to ensure and establish the BTPM framework. The framework includes four key factors: input, mechanism, controls, and outputs. For the factor of the Framework (see Chapter Three Section 3.4.3.b for details), functional process modelling or IDEF0 notation has been selected. The reason for selecting functional process modelling is because it helps to define the flexibility of the business process as the assignment of organisation employee and technical resources to the tasks and operations that continue the processes (Kim and Jang, 2000).

To develop a BTPM framework, an organisation must examine its strategic, tactical and operational activities. It must also typically determine *what* the purpose of the management process is. The organisation must focus on *how* the process has to be developed and does the business travel framework meet its objectives. IDEF0 notations help to identify these *what*, *how* and *do* questions (Ruikar *et al.,* 2003). The IDEF0 notations are as follows:

Input: Inputs are the activities that get transformed during the process, e.g. identify issues, outline the plan, and assess solutions.

Mechanism: Mechanisms allow the process to operate, e.g. tools, meetings, and documents. Mechanisms are the physical aspects of the activity that describe how the activities are carried out, such as: tools, technologies, resources.

Control: Controls are the activities which influence or direct how the process works, e.g. safety standards, regulations, time, resources. Constraints that are necessary to direct activities or produce outputs are: plans, specifications standards, policies (time/budget/quality).

Outcome: Outcomes are the results of the activity and are transmitted to other process, e.g. final plan, function according to plan.

- **Roles and Responsibilities**

Business travel involves a combination of various stakeholders (Gustafson, 2012; Douglas and Lubbe, 2006). Normally, two groups of people are assigned to the business travel activities: some are *internal* people and some are *external* people. These individuals are: policy makers (internal); strategic administrators (internal); line managers (internal); travellers (internal), TMCs (travel management company; external), other suppliers (external) and consultants (external).

Policy makers: policy makers are a higher level employee or the employer of an organisation (i.e. CEO, Directors). They mostly formulate the policy and have full control of the organisation. According to Anderson (2003, p.48), "*Policy Makers have the legal authority to engage in the formation of policy*". With regards to the roles of the policy makers, Anderson (2003) also explains their responsibilities as being legislators, executives, administrators and judges. In this framework, policy makers are responsible for developing the policy, monitoring and evaluating all business travel processes.

Strategic Administrators: According to Gustafson (2012), business travel managers are responsible for developing relationships with travellers, policy makers in their own organisations (who are often frequent travellers themselves), suppliers (airlines, train companies, hotel chains etc) and with TMCs. In this research business travel managers are a form of strategic administrator, who analyse the major initiatives taken by an organisation's policy makers involving resources and performance in internal and external environments. The strategic administrators in this circumstance are responsible for developing relationships with the travellers. However, they do not keep direct contact with the suppliers. Instead,

strategic administrators make contact with the suppliers via the TMCs. Different types of departments that are involved with the strategic administrators role for this framework are; human resource (HR), finance, marketing and IT. business travel managers can work as a member of the HR or Finance departments. Strategic administrators in this framework are involved in specifying the organisation's mission and objectives, developing policies and plans in terms of projects and programmes, which are designed to achieve these objectives and then allocate resources to implement the policies, and plans, projects and programmes.

Line manager: Line managers oversee the administration of activities that contribute directly to the output of products or services (Armstrong, 2001). Also, line managers are responsible for achieving an organisation's main objectives by executing functions such as policy making, target setting, and decision making. In this framework, the line managers give travel approval to the travellers as one part of their job. Finally, line managers must give approval for any reimbursement claim made by travellers.

Business travellers: Business travellers can be any person from the top level to the bottom level of an organisation. A traveller is a person who needs to travel in the course of his/her work (Swarbrooke and Horner, 2001). In this framework, a business traveller also will be any member of staff of the organisation who travels in the course of work.

TMCs: TMCs are the external organisations that help an organisation to book its travel. According to Vasudavan and Standing (1999), the role of the TMC includes three key tasks: a) passing information between buyers and suppliers; b) processing transactions, including printing tickets and forwarding money to the suppliers; and c) advising travellers. In this framework, TMCs undertake these three jobs and an automated self-booking system works to communicate between travellers, TMCs, line managers and strategic administrators.

External consultant: To define consultancy, Markham (2004 p.2), states, "*A simple definition of consultancy is delivering specialist skills from outside the organisation*". Markham (2004) also mentions that an external consultant provides an organisation with access to deeper levels of expertise than would be feasible for them to retain in-house, whilst purchasing only as much service from the outside consultant as desired. In this framework, the external consultant is a professional who provides professional or expert advice in a particular area, such as relating to a business travel process management system.

- **Activities**

These are actions within each phase. Once all the activities have been fully accomplished, the relevant phase has been successfully completed.

- **Phases**

Phases are the high level elements of the conceptual (BTPM) framework which are the main subjects that organisations must work through when developing their business travel management. The framework consists of four phases: Agenda Setting, Process Formulation, Process Implementation, and Evaluation. These phases are developed from the definition given by Fischer *et al.,* (2007) about agenda setting, process formulation, process implementation, and evaluation of travel policy and practice. For the definition of each phase see Figure 9.5 (each phase has been described in detail in Section 9.4). Phases are separated by gates.

- **Phases gates**

To ensure the effective use of the framework, organisations must move from phase to phase sequentially. To achieve the objective of each phase, the listed activities must be undertaken, before they can move to the next phase. These four phases have been developed from Fischer *et al.*, (2007) who demonstrated stages of the policy cycle (Figure 9.6). After accomplishing all the activities of each phase, they must check whether or not they have worked out the outputs that are displayed in the 'phase gates'. 'Phase gates' ensure the key decision points at the end of each phase. These phase gates are interrelated. The framework consists of four phase gates. The first phase gate has to be achieved before entering the second phase. The second gets passed through in order to enter the third phase and so on. For example, at the end of the agenda setting phase, the task, 'identify all the possible issues before formulating the processes,' should be done when all the activities in the phase are completed.

Agenda Setting

The agenda setting stage addresses the need for problems to be recognised before solutions can be found. An agenda is a collection of problems, understandings of causes, symbols, solutions and other elements of public problems that come to the attention of members of the organisation. An agenda may be as concrete as a list of issues that are before a management body but also includes a series of beliefs about the existence and magnitude of problems and how they should be addressed by the organisation.

Process Formulation

Proposals for acceptable solutions are developed at the process formulation stage based on an accumulation of information, discussions between stakeholders and on plans, programmes. In this case, this stage also incorporates the act of decision-making where by the choice of solutions is formally approved by the organisation.

Implementation

Process implementation implies the establishment of adequate procedures to ensure that policies and processes are executed as accurately as possible. To this end, implementing organisations should have sufficient resources at their disposal, and there needs to be a system of clear responsibilities and hierarchical control to supervise the actions of implementers. A monitoring program is executed to assess the effectiveness of the implementation of the plan and identify any unforeseen effects.

During the process implementation stages the adopted actions and programmes are put into effect. Implementation processes require individual and concrete decisions, as well as procedural rules and regulations. They lead to impacts meaning concrete positive or adverse feedbacks on the side of the target groups to which the measures are addressed or of those actors that are incidentally affected by them.

Evaluation

Monitoring and evaluation allow for the assessment of the impacts of organisational actions plus contributions that they have made in order to solve existing problems. Depending on positive and negative effects and on the nature of a given problem, the process may be terminated or re-started at the agenda setting stage. New or additional initiatives and incremental steps for revised and new legislation will lead to processes. Observation is required because new developments, new opinions and values, new knowledge, understanding may require additional measures, or in the course of time may lead to a new iteration in the process cycle.

Figure 9.5 Definition of Agenda Setting, Process Formulations, Process Implementation and Evaluation (Source: Fischer *et al.,* 2007).

The framework can be read as a process map consisting of a vertical and a horizontal axis. The vertical axis shows the factors of functions (Input, Mechanism, Control, Outcome) which make up the process. The horizontal axis shows the process sequence (Time or Phases/Gates) and process participants (Roles and Responsibilities) respectively. The horizontal axis illustrates the individual process activities (the activities of each phase). As shown in Figure 9.5, the four phases of the framework include several activities. For example, the agenda setting phase includes 17 activities, the process formulation phase has 15 activities, the process implementation phase has 23 activities, and the evaluation phase has 11 activities. This process goes as a cycle, so its starts with agenda setting, then process formulation, process implementation and finally after ending the evaluation the agenda setting phase starts again.

In terms of outcome of the framework, this is the holistic approach of the business travel system where all the steps to manage business travel have been presented. Organisations may have some of these phases already in use, such as: process implementation and evaluation but may not have all these activity taken. If any organisation does not have any phase or activity then they can add it in to their system. The evaluation chapter revealed that organisations seem to think this framework is beneficial because it clearly defines each step in the process that all users and management will benefit from as all internal stakeholders would have had input which creates a better user experience. The organisations who are seeking to change or improve their business travel management process would benefit from this framework.
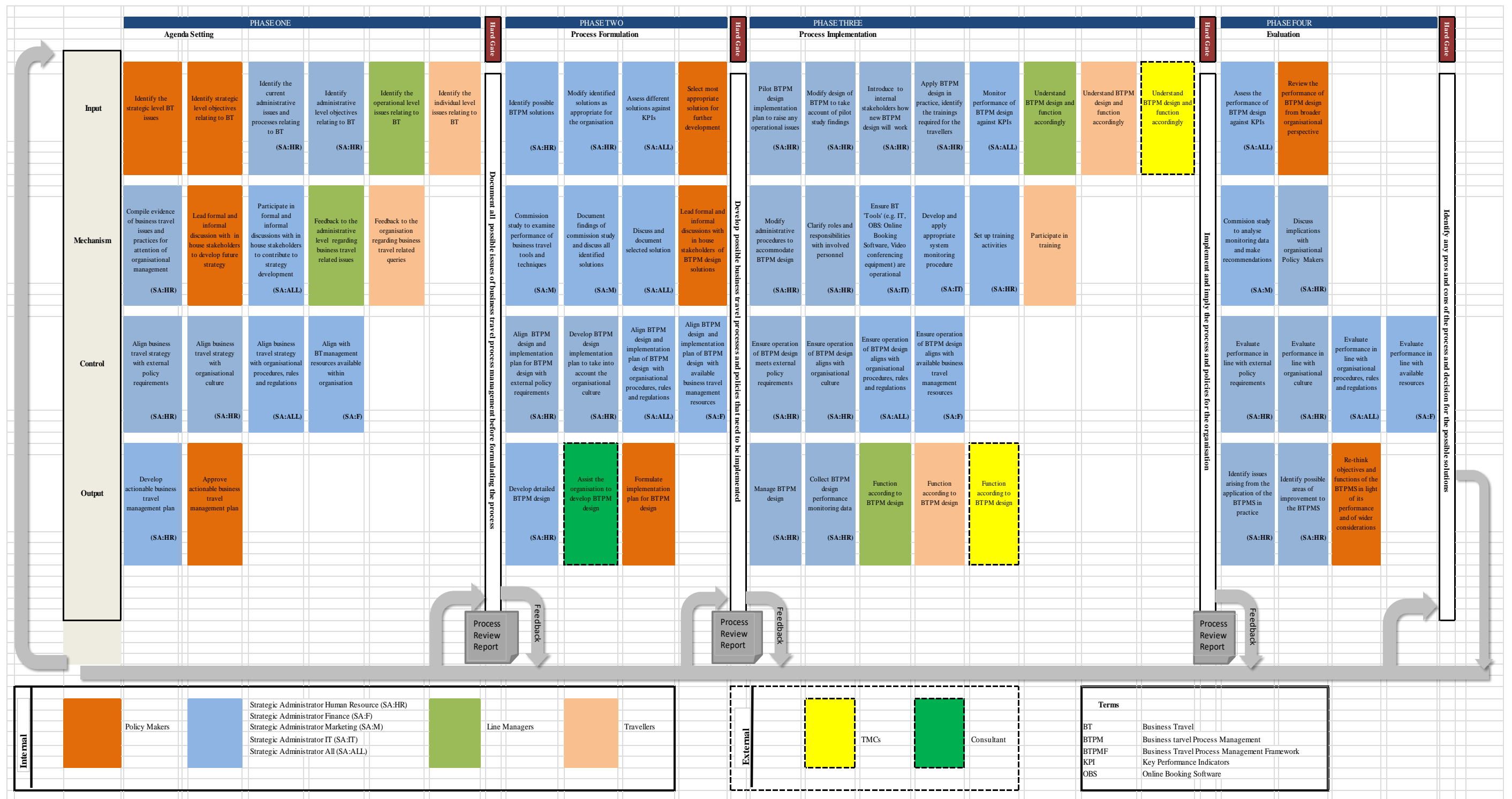
Figure 9.6 Business Travel Process Management Framework

The next section will explain the different phases of the conceptual (BTPM) framework in more detail.

9.4 PHASES OF THE FRAMEWORK IN DETAIL

Figure 9.5 shows the full framework with phase gates that are linked between each phases. The holistic view of the framework that shows each activity in four phases has shown the framework elaborated in one frame. However, all the phases have been shown individually in Figures 9.7, 9.25, 9.41 and 9.65 for a clear view in order to help the reader understand the BTPM framework and the various aspects of each actionable plan. A detailed breakdown of these aspects has been presented in a graphical form (Figures 9.7 to 9.76).

9.4.1 Phase One: Agenda Setting

This is the first phase of the conceptual (BTPM) framework (Figure 9.7). In most organisations, business travel and the working conditions of business travellers are not issues which concern the human resources department. The management of business travellers is largely left to the line managers (Welch *et al.,* 2007). However, organisations have their own rules and regulations regarding business travel "*control and/or commitment-based management*" (Gustafson, 2013, p.22) and this may be implemented by the HR department. For this reason, each organisation needs a link between travellers, line managers, human resources and policy makers to identify relevant business travel issues. This link is established at the agenda setting phase of the conceptual (BTPM) framework. Here, 'Agenda Setting' refers to the review of information regarding an organisation's internal business travel processes and external governmental policies, and stakeholders views related to business travel. In the agenda setting stage, travellers, line managers, strategic administrators (HR), and policy makers should work together to identify any issues that need to be solved before setting an agenda or developing new policies. The case study analysis undertaken for the purpose of this thesis (see Chapters Six, Seven and Eight), as well as the survey study results (Chapter Five) revealed a range of current business travel process-related issues facing organisations. In the Agenda Setting stage, an organisation needs to identify these types of issues that specifically relate to their own unique circumstances at any given time.

Figure: 9.7 Phase One Agenda Setting

The agenda setting stage allows an organisation to determine whether or not the issues of business travel can be left for normal follow up policies or the administrative process to rectify, or whether or not business travel issues should be selected for more fundamental and 'objective' analysis (Fischer *et al.,* 2007). The selected issues that are highlighted in this stage need to be executed for identify solutions. In this stage, the organisation needs to have a written document that reviews how the issues have arisen and what combinations of triggers/causes have led to them to take place. This document also reviews what are the impacts of business travel in an organisation.

Overall this phase provides guidance which allows organisations to analyse their business travel process management. The output of this phase includes documenting all possible issues before formulating processes. The process gate end of this phase is a phase gate. This means that when all the activities in this phase are accomplished, the organisation initiates the activities described in the following phase gate. At the end of this phase the organisation can document all possible issues of business travel process management before formulating the process.

The main activities included in this phase are in 17 steps with four factors (input, mechanism, control, and output) (Figure 9.5). Descriptions of these stages are described below.

Inputs: The agenda setting input stage itself consists of six individual steps. These include identifying the strategic level business travel issues as follows:

a) Identify the strategic level business travel issues;

b) Identify strategic level objectives relating to business travel;

c) Identify the current administrative issues and processes relating to business travel;

d) Identify administrative level objectives relating to business travel;

e) Identify the operational level issues relating to business travel; and

f) Identify the individual level issues relating to business travel.

The policy makers of an organisation need to identify the issues related to the strategic level of planning. For example, policy makers can give guidance on how the strategic administrators or line managers can identify whether the business trip is necessary or not. Figure 9.8 illustrates the key aspects (what, who, when, why and how) that organisations

need to consider when identifying the strategic level business travel issues within the Agenda Setting phase.

Phase One -Agenda Setting-

Input

What: The organisation must believe that a change in business travel process is important and valuable to its future, hence the organisation needs to identify various issues related to business travel. An organisation needs to identify the issues related to strategic level management system (i.e. how to monitor, demonstrate to the line manager and travellers).

Who: Policy makers are involved in this stage. Policy makers need to communicate with strategic administrators to gather information about business travel issues.

When: It is the early stage of the process design. In this stage the policy makers refashioned the strategic level process in order to maintain a coherent business travel system by identifying possible issues.

Why: It is the top level decision making process and this step is important because without a robust strategic structure the business travel management system cannot develop properly.

How: Policy makers collect all the documents related to previous years and analyse the issues and the impact of business travel on whole organisation. They identify the motivation and organisation's need for individual undertaking business travel by analysing the relevant documents. Policy makers also communicate with all the strategic administrators as necessary to identify:

- How to reduce the need for travel (design the management process in such a way that travellers avoid unnecessary journeys and find alternative ways of travelling);
- How to save time and money through efficient travel policy and practices;
- How to reduce carbon emissions that are caused by organisation business travel; and
- How to improve organisation standard through planned business travel.

Figure 9.8 Agenda Setting Input (Identify the Strategic Level Business Travel Issues).

Policy makers identify the organisation's strategic level issues relating to business travel with the help of strategic administrators and then identify the organisation's objectives. Issues will be selected and described to the policy makers by the strategic administrators as these issues are the issues in strategic level faced by the strategic administrators. Policy makers need to communicate with the strategic administrator to discuss the need for the organisation and finally set up the strategic level objectives for the organisation (see Figure 9.9).

Phase One – Agenda Setting – Input

What: After identifying the strategic level issues organisations need to identify the strategic level objectives that are related to business travel to solve the identified issues. Strategic level objectives need to fulfil the strategic level issues (i.e. develop organisational structures; develop to determine which departments are involved with the business travel).

Who: Policy makers are involved to identify objectives. Strategic administrators help the policy makers to identify objectives by communicating with the policy makers.

When: Before formulating any solution the policy makers need to select the objectives.

Why: Without strategic level objectives the organisation cannot develop the operation level.

How: The strategic level objectives can be related to:

- Identify the roles and responsibilities of the stakeholders;
- Identify an interrogative system for booking travel that is linked with the TMC and by which the organisation can book travel quickly and safely;
- Follow a cost effective and sustainable travel management process (i.e. to support travellers to use car share, public transport; review financial records of individual departments);
- Mention the standard level of the business travel (i.e. decide whether a Traveller is allowed to use business class air tickets or not; what mode they can use for the domestic travel); and
- Develop a smarter working policy.

Figure 9.9 Agenda Setting Input (Identify the Strategic Level Objectives Relating to Business Travel).

Once the policy makers identify the objectives for the strategic level the strategic administrators, especially the HR department, need to identify current administrative issues and processes relating to business travel (i.e. bring all the business travel administrative information together such as staff expenses claims, in-house fleet, rented cars and, travellers personal complaints against the administration system) to identify the administrative issues (see Figure 9.10).

Phase One -Agenda Setting -Input
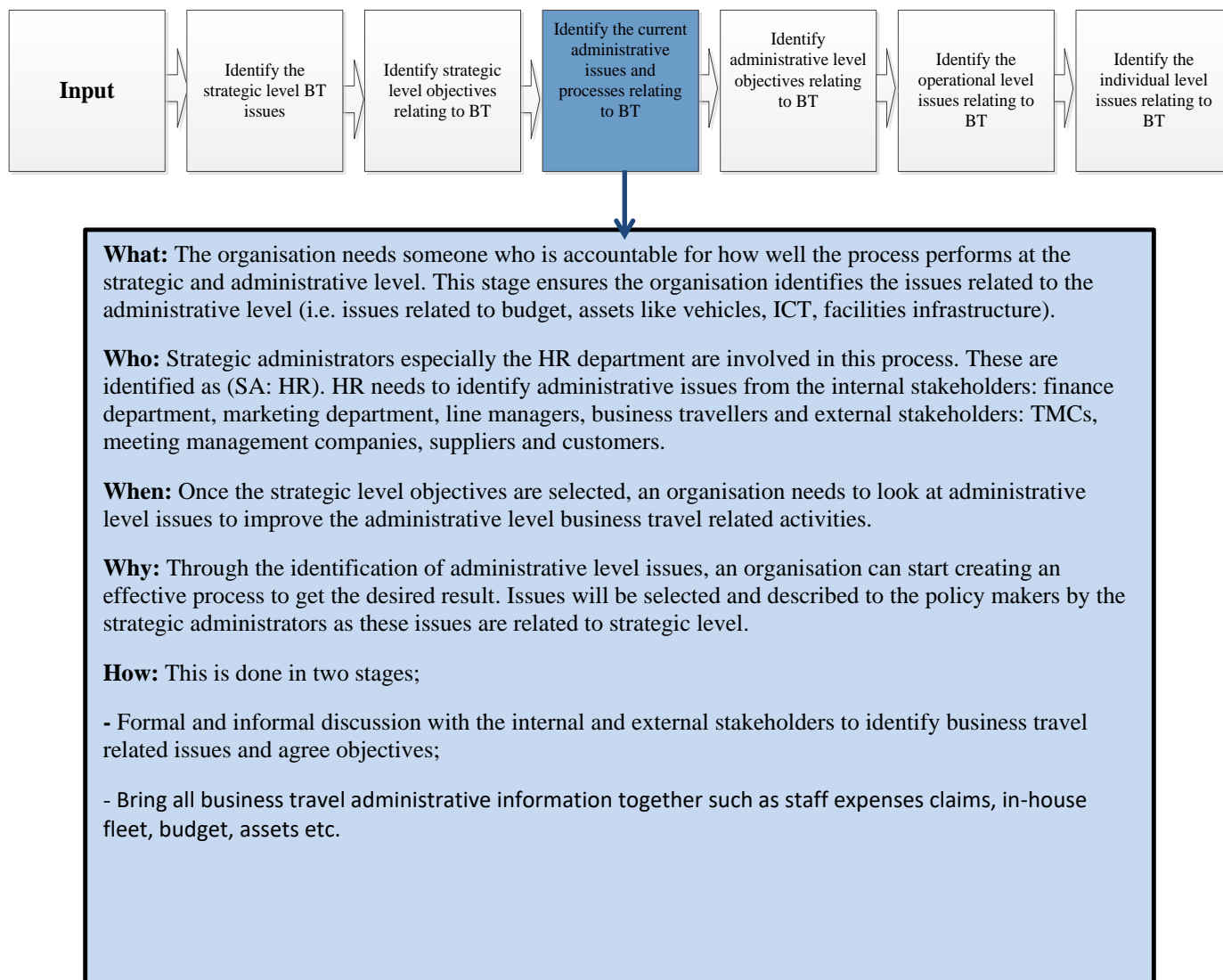
Figure 9.10 Agenda Setting Input (Identify the Current Administrative Issues and Processes Relating to Business Travel).

Strategic administrators (especially the human recourse department) need to review administrative level business travel process objectives and inter relate the objectives with the company's overall objectives (see Figure 9.11).

Phase One -Agenda Setting -

Input
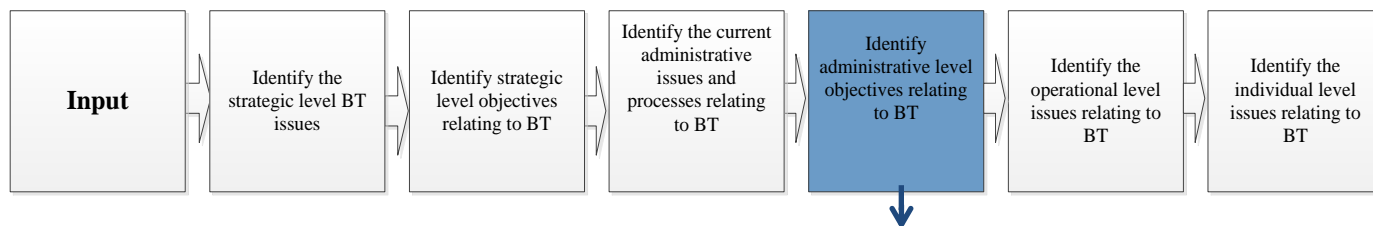
What: An organisation needs to identify all the administrative level objectives so that one objective of the process does not conflict or contradict with another objective. For example, saving money is one of the objectives of the organisation. However to save travel cost, an organisation should stop undertaking business travel, yet it is likely that this would affect the standard of the organisation. Thus, setting administrative level objectives are very important.

Who: The framework supports to organisation outsourced all the business travel booking process by TMC, however the organisation needs strategic administrators who can keep direct links with the TMC (Fuentes, 2011). In this state, a strategic administrator who is responsible for identifying administrative level issues and also identifies the administrative level objectives and discuss with the policy maker.

When: Before selecting any solutions and implementing the process all the objectives need to be selected.

Why: To meet the objectives of the stakeholders, customers and employees, the strategic administrators need to identify the administrative level objectives.

How: Organisations need to have well defined boundaries of the booking business travel process. Administrative level objectives can be as follows:

- Undertake essential business travel (i.e. review corporate policies and priorities to determine travel requirements for cost, health, safety and environment);

- Select appropriate TMCs;

- Follow organisational policies to implement fleet management, sustainable transport plan; and

-Increase efficiency.

Figure 9.11 Agenda Setting Input (Identify Administrative Level Objectives Relating to Business Travel).

Line managers play a vital role in approving the business travel booking forms. Line managers often decide if the travel is necessary or not and who needs to travel and for what purpose; and checks if all travel booking forms have been filled properly (see Figure 9.12).

Phase One – Agenda Setting – Input

What: Organisations need to address the critical issues of business travel at the tactical or operational level (i.e. travellers filling in the booking forms correctly, teamwork and customer service.).

Who: Line managers are directly responsible for ensuring that business travellers fill the booking forms properly and whether the traveller's application for travel is valid or not. If any issues happen, the line managers need to contact the appropriate strategic administrators.

When: This process needs to be carried out whilst the strategic administrators are identifying the administrative level issues and objectives.

Why: Line managers need to develop recommendations about the operational level issues and how the organisation could make major progress on its respective issues.

How: Line managers, HR managers can keep communication with travellers through meetings or face-to-face contact so that if any problems arise the travellers can complain straight to the line manager. The line manager can then inform the relevant strategic administrator of any issues. To identify the operational level issues, line managers can:

- Keep liaising with the travellers and the strategic administrators; and

- Identify the problems and reason behind them and report them to the strategic administrators.

Figure 9.12 Agenda Setting Input (Identify the Operational Level Issues Relating to Business Travel).

Travellers need to report to their line managers any issues they experience relating to their business travel. Travellers can also contact their strategic administrators to inform them about of any issues. The organisation needs to introduce to which strategic administrator the traveller can contact regarding their issues related to business travel. The travel policy document can mention the job role and can give instruction for the traveller to contact with the allocated strategic administrator in case any issue arises (see Figure 9.13).

Phase One – Agenda Setting –

Input

What: An organisation needs to give priority to each traveller's work-life balance and give opportunities for the travellers to speak about their problems.

Who: Travellers should raise any travel issue with their line manager. Alternatively travellers can contact a strategic administrator as needed.

When: After undertaking travel, travellers can raise their issues related to the travel as soon as possible so that any issues can be addressed quickly.

Why: If the difficulties experienced by the traveller are not known, then it is difficult for the organisation to identify issues related to the operational level and so make alteration at the administrative level.

How: The work-life balance, safety, and performance of travellers is very important to the organisation. If any incident happens that creates an obligation for the traveller, then the traveller needs to inform their line manager/strategic administrators. To face this situation, the traveller can:

- Inform the line manager and the strategic administrators about the current issues (i.e. work-life balance, any technical difficulties); and

- Help the line managers and strategic administrators to find solutions for the problems.

Figure 9.13 Agenda Setting Input (Identify the Individual Level Issues Relating to Business Travel).

Mechanisms: After discussing all the inputs of the agenda setting phase, the mechanisms of the agenda settings need to be explored. Through these mechanisms, all the agenda settings actions are managed. The agenda setting mechanism phase consists of five steps. These are:

a) Compile evidence of business travel issues and practices for the attention of organisational management;

b) Lead formal discussions with in-house stakeholders to develop future strategy by strategic administrator;

c) Travellers participate in formal discussions lead by strategic administrators to contribute to strategy development;

d) Feedback provided to the administrative level regarding business travel related issues; and

e) Feedback provided to the organisation regarding business travel related queries.

The very first step of the agenda settings mechanism, strategic administrators (HR) involves accumulating all the business travel-related issues and archiving them to discuss with policy makers (see Figure 9. 14).

Phase One - Agenda Setting -

Mechanism
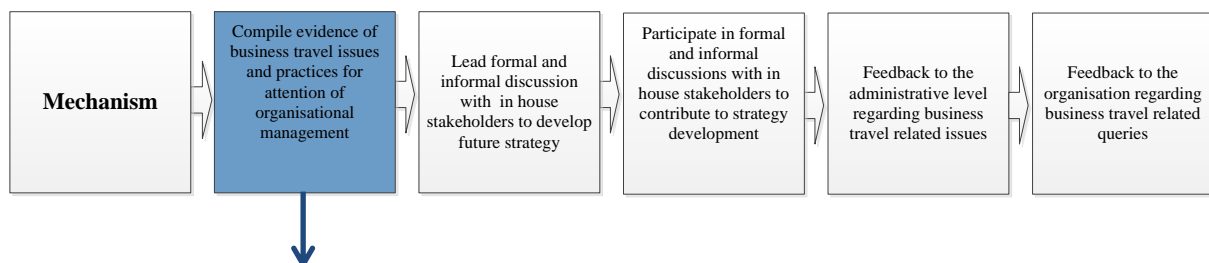
What: A document that collects all the issues relating to strategic, administrative and operational levels and including the traveller's personal issues relating to business travel.

Who: Strategic administrators (HR) are involved in documenting all the issues about thestrategic level, administrative level and operational level.

When: Different stakeholders bring issues related to the business travel to the strategic administrators. As soon the issues are identified, strategic administrators need to record/archive the issues for future reference.

Why: If the issue are not documented then the organisation has a chance to forget or overlook the issues, and thus the organisation may lose track in monitoring the performance of the organisation's business travel process management (BTPM).

How: Administrators (HR) can have the issues written in a file or they can save them online (potential issues with version control). Administrators need to collect all the information about business travel issues from various perspectives like those of business travellers, line managers, or TMCs. After collecting the information, HR needs to document all the issues physically or electronically.

Figure 9.14 Agenda Setting Mechanism (Compile Evidence of Business Travel Issues and Practices for Attention of Organisational Management).

Policy makers need to communicate with all internal or in-house stakeholders to discuss potential new policies, to identify any current issues and to give solutions to the issues (see Figure 9.15).

Phase One -**Agenda Setting -**

Mechanism
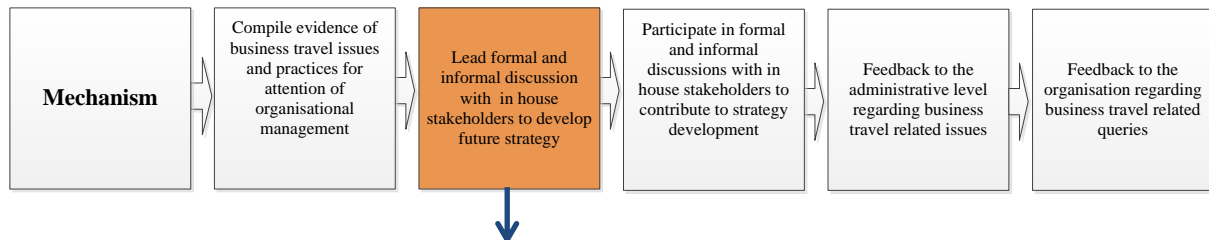
What: Top level decision makers need to communicate with the internal stakeholders. Without the communication from the strategic level, the organisation would not be aware of the issues of the implementation level. On the other hand, Travellers would not know about any new changes made by the strategic level.

Who: Policy makers need to give opportunities to all their employees to interact with each other to discuss any issues related to business travel.

When: This communication needs to take place on a basis of employer/employee need. However, an organisation can have annual, monthly, weekly, daily meetings or assembly to communicate with the stakeholders.

Why: To better understand the problems, issues and barriers.

How: Policy makers need to keep liaising with the strategic administrators and line managers to solve the business travel related issues and find future options. Policy makers can arrange annual or monthly meetings with the internal stakeholders. Policy makers also can welcome any opinion from stakeholders at any time via email for example.

Figure 9.15 Agenda Setting Mechanism (Lead Formal and Informal Discussion with In-House Stakeholders to Develop Future Strategy).

Similar to policy makers, the strategic administrators are also responsible for participating in formal and informal discussions with in-house stakeholders (see Figure 9.16).

Phase One -Agenda Setting–

Mechanism


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┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│              │   │ Compile      │   │              │   │ Participate  │   │              │   │              │
│              │   │ evidence of  │   │ Lead formal  │   │ in formal    │   │ Feedback to  │   │ Feedback to  │
│  Mechanism   │   │ business     │   │ and informal │   │ and informal │   │ the          │   │ the          │
│              │   │ travel issues│   │ discussion   │   │ discussions  │   │ administrative│  │ organisation │
│              │   │ and practices│   │ with in house│   │ with in      │   │ level        │   │ regarding    │
│              │   │ for attention│   │ stakeholders │   │ house        │   │ regarding    │   │ business     │
│              │   │ of           │   │ to develop   │   │ stakeholders │   │ business     │   │ travel related│
│              │   │ organisational│  │ future       │   │ to contribute│   │ travel       │   │ queries      │
│              │   │ management   │   │ strategy     │   │ to strategy  │   │ related issues│  │              │
│              │   │              │   │              │   │ development  │   │              │   │              │
└──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘
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What: Communication between internal stakeholders is important because an organisation cannot develop new strategies without the communication between employees.

Who: Strategic administrators need to maintain communication between policy makers, line managers and travellers. The strategic administrator often works as a link between line managers and travellers.

When: Once the strategic administrators identify the issues related to the business travel they need to inform it to the policy makers. On the other hand, strategic administrators need to keep communicating with the line managers and travellers to identify problems.

Why: To identify the business travel related issues and present the results to the policy makers.

How: Strategic administrators need to participate in any meetings arranged by the policy makers. Strategic administrators themselves can arrange meetings with the line managers and travellers. Strategic administrators also can work as an intermediary in between the travellers and the policy makers.

Figure 9.16 Agenda Setting Mechanism (Participate in Formal and Informal Discussions with In-House Stakeholders to Contribute to Strategy Development).

The previous sections have shown that the within the agenda setting phase, the line managers need to identify operational level issues. The next stage is the mechanism stage of the process, in which the line managers need to inform business travel-related issues to the strategic administrators (see Figure 9.17).

Phase One -Agenda Setting -

Mechanism

| Mechanism | Compile evidence of business travel issues and practices for attention of organisational management | Lead formal and informal discussion with in house stakeholders to develop future strategy | Participate in formal and informal discussions with in house stakeholders to contribute to strategy development | Feedback to the administrative level regarding business travel related issues | Feedback to the organisation regarding business travel related queries |

What: Once the line managers identify different business travel issues they need to inform the strategic administrative HR and finance as needed.

Who: Line managers, strategic administrators (human resources, finance, IT, marketing).

When: Line managers need to monitor the travel process and give feedback to the strategic level on weekly or monthly basis. If any urgent situation occurs then the line managers need to inform the strategic administrators as soon as possible.

Why: Without the help of the line manager, the strategic level cannot locate the operation level issues as they do not have direct contact with the travellers in regular basis.

How: Line managers can inform to the strategic level via phone, fax, emails or meetings about the issues. If the issues are related to traveller's personal difficulties, the HR department is then able to deal the situation. All strategic administrators are responsible for identifying issues related to business travel, so the finance department deals with finance related issues, IT deals with IT related issues and the line managers need to inform about all the issues to the relevant department.

Figure 9.17 Agenda Setting Mechanism (Feedback to the Administrative Level Regarding Business Travel Related Issues).

Travellers are responsible for giving all their feedback to the line managers regarding their business travel while any queries are dealt with by the line managers (see Figure 9.18).

Phase One –Agenda Setting –

Mechanism

What: Travellers need to provide all the information asked for by the line manager or from the strategic level to help the organisation develop an improved business travel management system.

Who: Business travellers need to inform to the line managers about the issues and give feedback to the line managers. If the line manager is not available or can assist the traveller then strategic administrators deal with traveller's issues and at that stage travellers have to inform the strategic administrators directly.

When: As soon any issue arises (i.e. traceability of the traveller's information) regarding business travel the line managers/strategic administrators need to query about the issue and the traveller has to give their feedback.

Why: Without the help of the traveller, the line manager and strategic administrators would not understand the current issues faced by the travellers.

How: Travellers can have discussions face-to-face with the line managers about the issues related to the business travel and provide verbal feedback.

Figure 9.18 Agenda Setting Mechanism (Feedback to the Organisation Regarding Business Travel Related Queries)

Controls: An organisation needs to control the process of agenda setting in line with various external and internal requirements. The agenda setting controls comprises four steps:

a) Align business travel strategy with external policy requirements;

b) Align business travel strategy with organisational culture;

c) Align business travel strategy with organisational procedures, rules and regulations; and

d) Align with business travel management resources available within the organisation.

To ensure that BTPM design is fit for purpose, the strategic administrators (HR) first need to align the organisational business travel strategies with governmental policy requirements (see Figure 9.19).

Control

What: Organisations need to review the governmental business travel related agenda to do with issues such as competition rules, health and safety, environmental regulations and taxes.

Who: Strategic administrators (HR) need to keep abreast of developments in government policy.

When: Before setting the organisational policies/agenda, the strategic administrators (HR) need to review the policy climate that relates to business travel.

Why: If the organisational agenda does not match with government policy, then organisational policy will not be cost effective, and may in some cases not be legal.

How: Before introducing any organisation policy the strategic administrators need to review any government policy that is potentially relevant through reading the business travel trade press and discussion with internal and external policy makers and members of the organisational legal department (or equivalent). In addition, it is recommended that such policy reviews should take place on a regular basis to ensure circumstances have not changed.
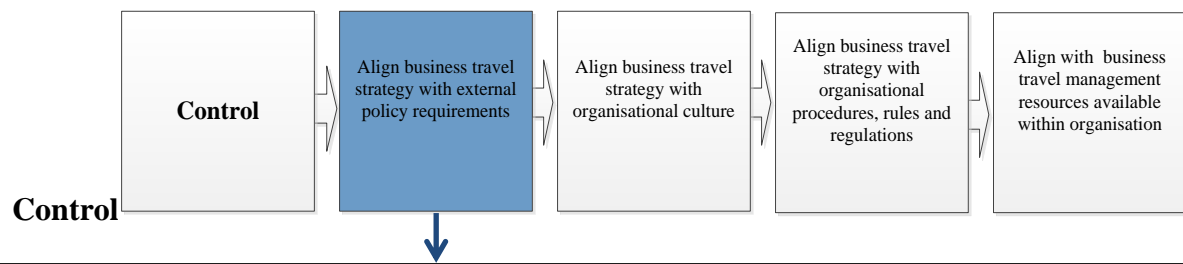
Figure 9.19 Agenda Setting Control (Align Business Travel Strategy with External Policy Requirements).

To control the BTPM system, strategic administrators (HR) need to align the organisational business travel strategies with organisational practices (i.e. traveller's choice, traveller's performance and traveller's capacity for work) (see Figure 9. 20).
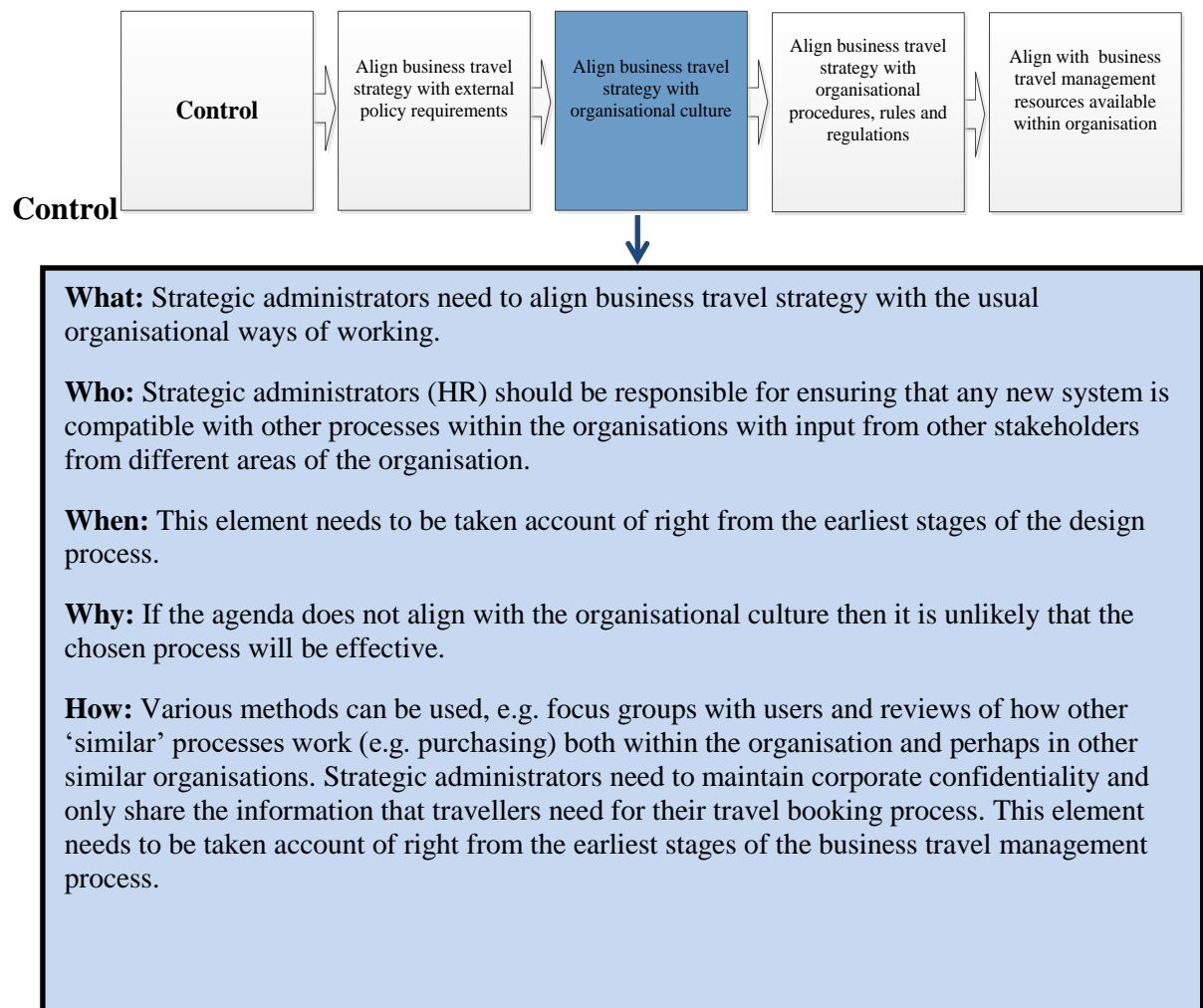
Figure 9.20 Agenda Setting Control (Align Business Travel Strategy with Organisational Culture).

To control the BTPM system, strategic administrators (HR) need to report to the policy makers about any strategic (agenda/ goal of the business travel) issues. If there is a need for a new strategy to develop in the organisation, the strategic administrators need to align this with any relevant organisational procedures rules and regulations (see Figure 9.21).

Phase One -Agenda Setting-

Control

| Control | → | Align business travel strategy with external policy requirements | → | Align business travel strategy with organisational culture | → | Align business travel strategy with organisational procedures, rules and regulations | → | Align with business travel management resources available within organisation |
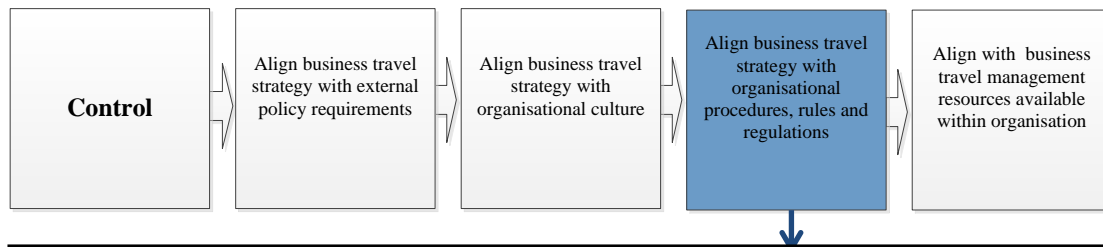
What: The business travel agenda need to be aligned with the relevant organisational procedures, rules and regulations. Each organisation has their own rules and regulations on managing business travel process.

Who: All strategic administrators (HR, finance, IT, marketing) are responsible for developing the organisational policies and they need to contact the policy makers to finalise the policies.

When: To set the business travel agenda/goals/objectives all strategic administrators need to follow the organisational policies.

Why: Business travel agenda need to be systematic and planned.

How: All strategic administrators need to align business travel strategy with the organisational procedures. When any of the strategic administrators develop a strategy and want to establish it in the organisation, they need to align it with the organisational rules and regulations by following instructions and by discussing with the policy makers.
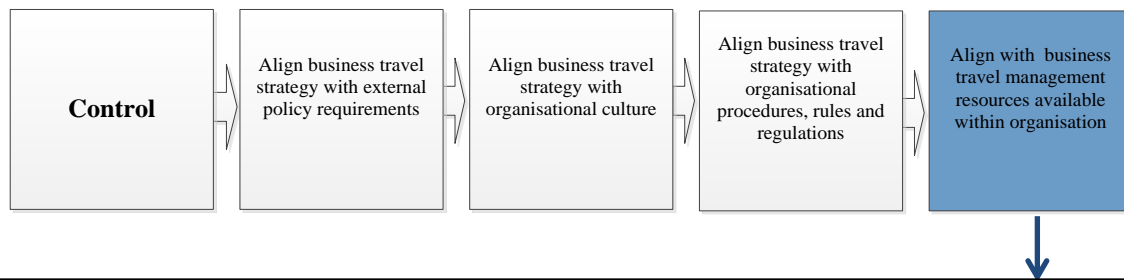
Figure 9.21 Agenda Setting Control (Align Business Travel Strategy with Organisational Procedures, Rules and Regulations).

To control the BTPM system, the strategic administrator (Finance) needs to review the organisational budget, facilities and infrastructure (see Figure 9.22).

Phase One-Agenda Setting- Control

What: Organisations can set the business travel budget according to the turnover and review the process to make it cost effective. Organisations also need to review the facilities infrastructure related issues, these could include resources such as investment/operating budgets, skills, people, energy, land and develop IT tools, connections.

Who: The strategic administrator (finance department) needs to review the organisational resources and inform to the policy makers.

When: While setting the agenda, the strategic administrators need to think that the agenda is compiled in line with the available financial resources.

Why: An organisation needs to afford the system and cannot do anything beyond their capacity.

How: Strategic administrators (finance) must be aware of the budget all the time and inform the limit to the policy makers. Strategic administrators (finance) also need to review all the infrastructure that are available to undertake business travel and note any issues related to it to report to the policy makers.
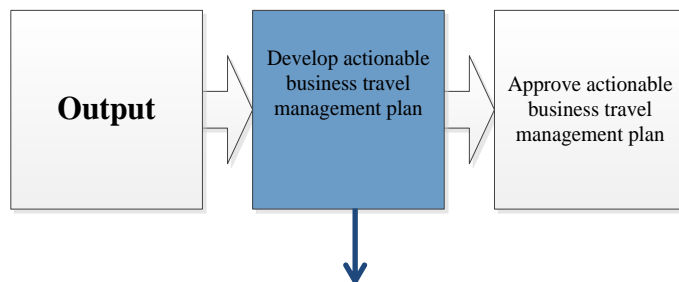
Figure 9.22 Agenda Setting Control (Align with Business Travel Management Resources Available within an Organisation).

Outputs: After inputs, mechanisms, controls of the agenda setting, two outputs are produced, i.e.

 a) Develop an actionable business travel management plan; and

 b) Approve actionable business travel management plan.

Actionable business travel management plans once developed (by SA: HR), should be approved by the policy makers. Strategic administrators (HR) should keep all the records of the issues related to the business travel that have been reported by the travellers. Strategic administrators need to document the information to discuss with the policy maker (see Figure 9.23).

Phase One- Agenda Setting- Output

What: After all the issues of business travel are identified and the objectives have been set, the strategic administrators need to make a proposal for the employees that will result in an actionable management plan.

Who: Strategic administrators (HR), all employees of the organisation.

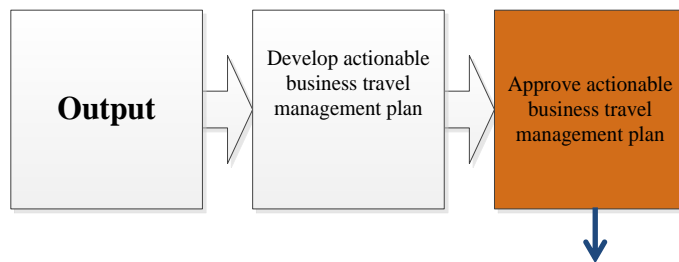**When:** After identifying the issues of business travel and the objectives it needs to meet.

Why: The actionable management plan can help the organisation to introduce and operate the new process in a systematic manner which should ensure that all of the most commonly faced issues have been considered and addressed.

How: Strategic administrators (HR) can develop some of the documents of their management plan and can introduce it to the travellers. HR department collect all the issues from various sources like other strategic administrators (finance, IT, marketing), line managers and travellers and then document the issues to develop an action plan. Once they develop and document the action plan they discuss it with the policy makers.

Figure 9.23 Agenda Setting Output (Develop Actionable Business Travel Management Plan).

Policy makers need to approve the actionable business travel management plan that was developed by the strategic administrators (HR) in the previous step (see Figure 9.24).

Phase One-Agenda Setting- Output

What: Organisation needs to approve the actionable business travel management plan developed by the strategic administrator.

Who: Policy makers need to approve the actionable business travel management plan developed by the strategic administrator (HR).

When: Once the strategic administrators develop the actionable business travel management plan the policy makers need to approve the plan.

Why: The actionable business travel management plan needs to be confirmed by the policy makers so that it becomes properly integrated into broader organisational policies and procedures.

How: Policy makers need to give written permission of the actionable business travel management plan. Policy makers need to verify the contents of proposed actionable business travel management plan and approve the plan.

Figure 9.24 Agenda Setting Output (Approved Actionable Business Travel Management Plan).

9.4.2 Phase Two: Process Formulation

Once the issues of business travel are selected and an actionable business travel Management plan has been developed, the next step is to identify the solutions to the issues. In this stage (Figure 8.25) the organisation needs to consider alternative possible future solutions, given different assumptions about the development of both problems and policies related to business travel. As an outcome of this process, the organisation should develop detailed conceptual (BTPM) framework. It is very important for the organisation to improve the outcomes generated from business travel activities.

In this stage, the organisation needs to assess a range of different solutions against Key Performance Indicators (KPIs). Some proposed KPIs are included here which are common for most organisations to measure business travel related issues. These KPIs are selected on the basis of results from the survey and case studies results where the current business travel processes have been analysed. Thus:

To identify the cost/carbon emission related solutions: it has been found for domestic travel that an organisation uses cars, rail and air as travel modes. Organisations can measure mileage while using cars (company cars, travellers' cars, hire cars, taxis); for public transport/air an organisation can measure total expenditure;

- To identify the cost and technology related solutions: an organisation needs to keep all the records of travel replaced by virtual meetings;

- To identify travellers' work-life balance: the organisation needs to record travellers' attendance and monitor performances; and

- To identify organisation standard: the organisation needs to monitor turnover, achievement that improved through business travel.

Figure 9.25 has been added for a better view of the diagram than the full diagram (Figure 9.6). The detailed actionable plan of the process formulation phase can be found in Figures 9. 26-9.40.

Figure: 9.25 Phase Two Process Formulation

The process formulation stage consists of fifteen steps. Each of the steps is described in the figure with the actions:

Phase Two- Process Formulation - Input

| Input | Identify possible BTPM solutions | Modify identified solutions as appropriate for the organisation | Assess different solutions against KPIs | Select most appropriate solution for further development |

What: Organisation needs to identify possible business travel process management (BTPM) solutions after reviewing the agenda or the actionable management plan.

Who: Strategic administrators (HR) and marketing group need to do research on possible solutions.

When: This stage needs to be established after develop the actionable management plan, so that the organisation knows what type of solutions they need.

Why: This stage allows identifying the correct processes for the organisation that can be cost and time effective. For example, best Online Booking System (OBS), right analysing tool to identify travel cost and management fees, the correct carbon calculating tool.

How: Strategic administrator (HR) needs to contact the marketing group to identify what are the solutions available on market. Also, the HR department needs to verify all the issues raised by the organisation thoroughly and select possible solutions.

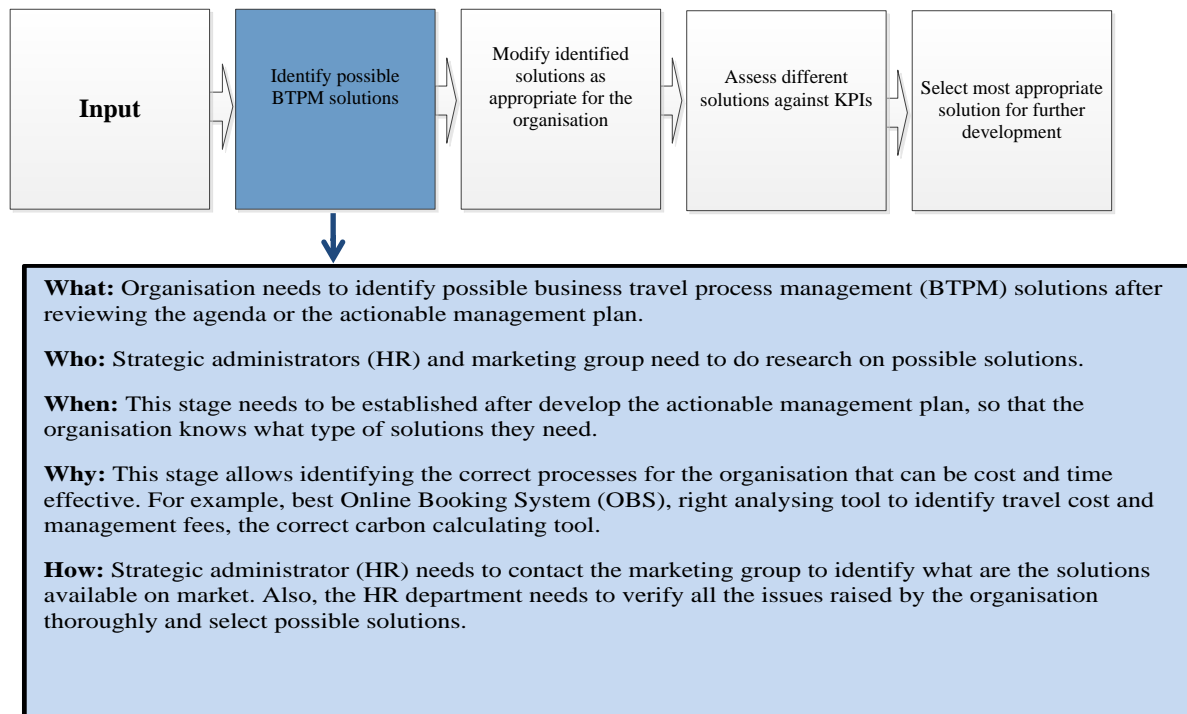**Figure 9.26 Process Formulation Input (Identify Possible Business Travel Process Management Solutions).**
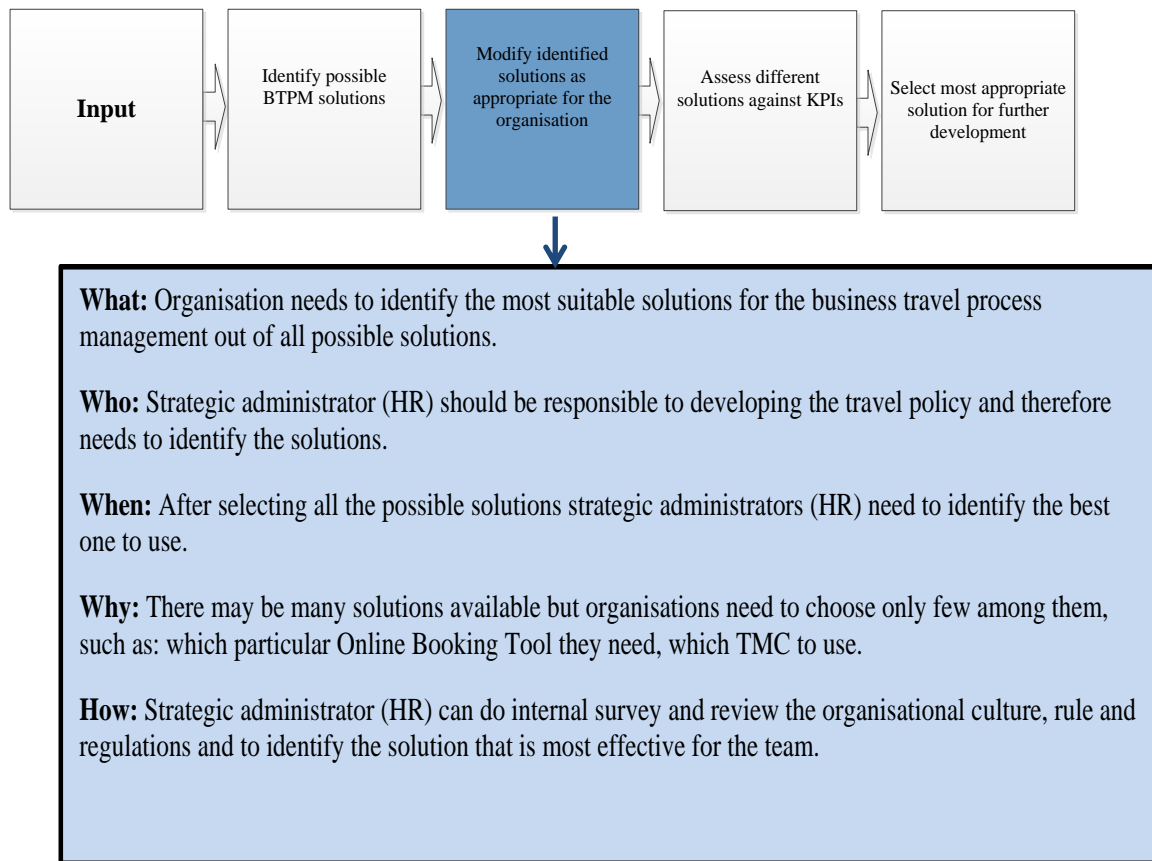
Phase Two- Process Formulation

What: Organisation needs to identify the most suitable solutions for the business travel process management out of all possible solutions.

Who: Strategic administrator (HR) should be responsible to developing the travel policy and therefore needs to identify the solutions.

When: After selecting all the possible solutions strategic administrators (HR) need to identify the best one to use.

Why: There may be many solutions available but organisations need to choose only few among them, such as: which particular Online Booking Tool they need, which TMC to use.

How: Strategic administrator (HR) can do internal survey and review the organisational culture, rule and regulations and to identify the solution that is most effective for the team.

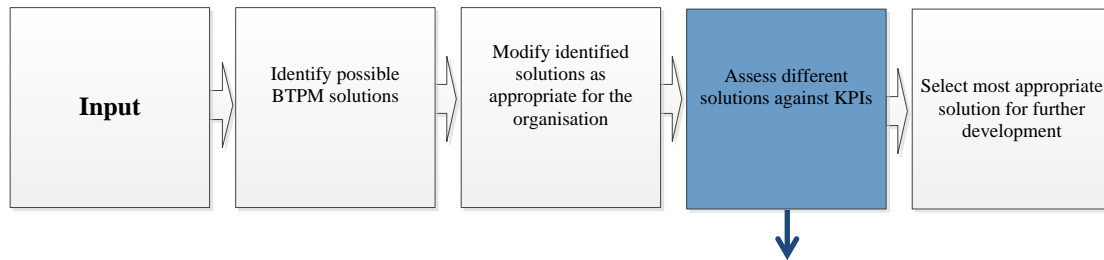**Figure 9.27 Process Formulation Input (Modify Identified Solutions as Appropriate for the Organisation).**

Phase Two- Process Formulation

Input -

What: Solutions needed to be assessed against the Key Performance Indicators (KPIs). The recommended KPIs for all types of business organisations are:

- Cost effective (measure mileage per gallon of any car travel, total expenditure on public transport, number of flights);
- Time effective (use of video conferencing facilities and ensure to keep records of using video conferencing to identify the data on business travel avoided); and
- Business Standard (measuring the organisation's performance each year by recording achievements).

Who: All strategic administrators (HR, finance, marketing, IT) need to be involved with this. For example, measuring expenditure can be done by the finance; record of technology (video conferencing) can be converting by IT; measuring achievements can be done by HR).

When: This process needs to be taken after identify final solutions and before selecting the solution to use.

Why: The solutions needed to be measured so that they can meet the organisation's need.

How: Strategic administrators (HR) need to keep in mind the KPIs and assess the solutions against them. Strategic administrators need to inform the policy makers about their decision.

Figure 9.28 Process Formulation Input (Assess Different Solutions against KPIs)

Phase Two- Process Formulation -

Input

| Input | Identify possible BTPM solutions | Modify identified solutions as appropriate for the organisation | Assess different solutions against KPIs | Select most appropriate solution for further development |

What: Organisations need to finalise an appropriate solution and keep continuing the development.

Who: The final solution needs to be approved by the policy makers after being selected by the strategic administrators.

When: Once the strategic administrators (HR) identify the best solution from all the possible solutions the policy makers need to review it for finalising.

Why: Final decisions must have been taken by the policy makers. This interaction between strategic administrators (HR) enforces the control of the policy and the application.

How: Via internal meeting policy makers can listen to the strategic administrator (HR) outline their selected solutions, decisions and finally record the appropriate solutions in detail for further development.
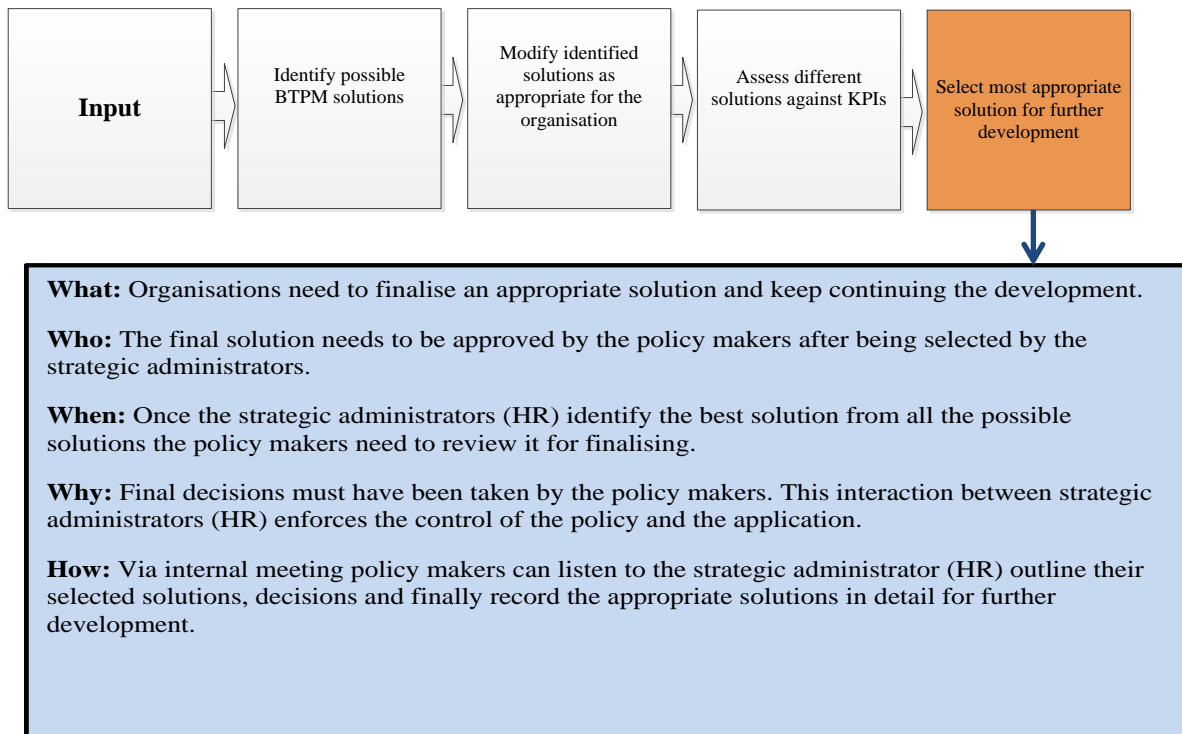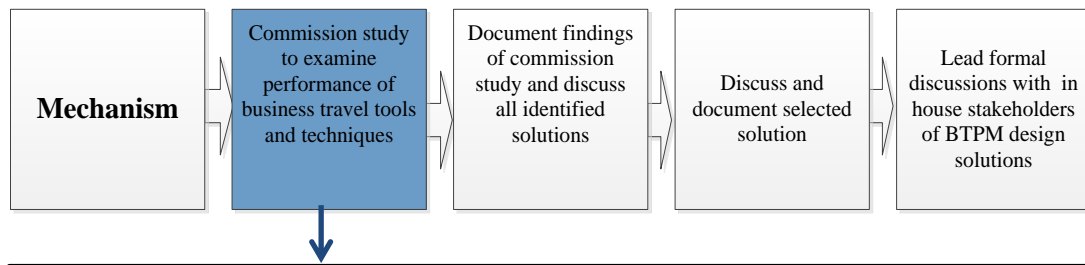
Figure 9.29 Process Formulation Input (Select Most appropriate solution for further development).

Phase Two- Process Formulation - Mechanism

| Mechanism | Commission study to examine performance of business travel tools and techniques | Document findings of commission study and discuss all identified solutions | Discuss and document selected solution | Lead formal discussions with in house stakeholders of BTPM design solutions |

What: Organisations need to do market study for various methods/solution that are available to use. Before selecting a solution any organisation needs to identify how many different solutions are available around the world. Mechanisms for this are survey and research by the strategic administrators.

Who: Strategic administrators (marketing) and strategic administrator (HR) are related to this study.
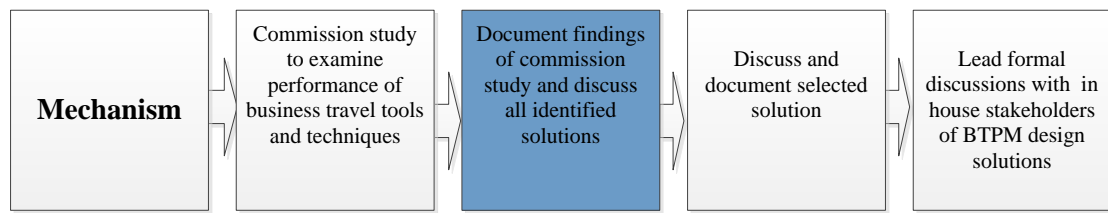
When: Before taking any decision about the solution to use for the organisation.

Why: Without an exclusive research on the market for available solutions or the best practices no organisation can learn about the best options.

How: Observation, market research, meeting, visiting places are the processes to undertake the study. The marketing department of any organisation is responsible for this job. They need to have an idea of the business travel management process in the organisation and they need to do the market research via survey, meetings, and visiting places. Thereby they list the possible solutions that are available for the organisation to choose.

Figure 9.30 Process Formulation Mechanisms (Commission Study to Examine Performance of Business Travel Tools and Techniques).

Phase Two- Process Formulation - Mechanism

What: All identified possible solutions need to be documented after identification by the strategic administrators.

Who: Strategic administrator (marketing/HR) can document the possible solutions.

When: While identified different solutions of managing business travel process management via market study.
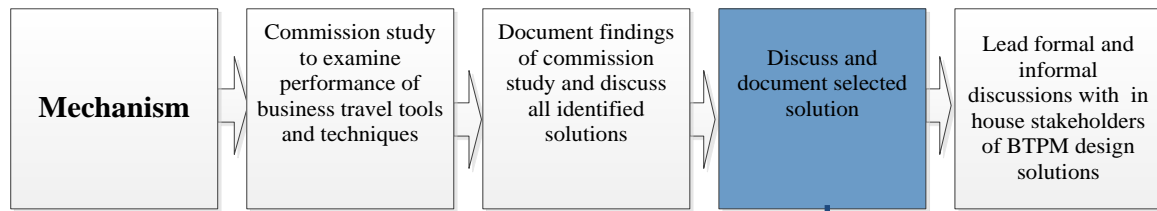
Why: If the solutions are not documented then the strategic administrator might lose track and forget to report all the possible solutions to the policy makers to select.

How: Strategic administrator (marketing/HR) can save the documents by writing and filing or via saving details on computer. Strategic administrator (marketing) has to contact strategic administrator (HR) to report the listed solutions. Also strategic administrator (HR) can have another list of solutions found themselves.

Figure 9.31 Process Formulation Mechanism (Document Findings of Commission Study and Discuss All Identified Solutions).

Phase Two- Process Formulation -

Mechanism

Figure 9.32 Process Formulation Mechanism (Discuss and Document Selected Solution).

Phase Two- Process Formulation -

Mechanism

| Mechanism | Commission study to examine performance of business travel tools and techniques | Document findings of commission study and discuss all identified solutions | Discuss and document selected solution | Lead formal and informal discussions with in house stakeholders of BTPM design solutions |

What: Communication between policy makers, strategic administrators, and travellers is important.

Who: Policy makers need to take responsibility so that all type of communication between the employees are possible. As for example, communication between strategic administrators (HR) and policy makers or communication between strategic administrators (marketing) and policy makers.

When: Interaction should happen as needed e.g. monthly, weekly or daily basis.

Why: Without good communication organisations might miss the information to collect, restore, develop and use. Organisation can face difficulties to take any decision.

How: Internal stakeholders can keep communicating via meetings, assembly, phone, email or face to face contact between employees.
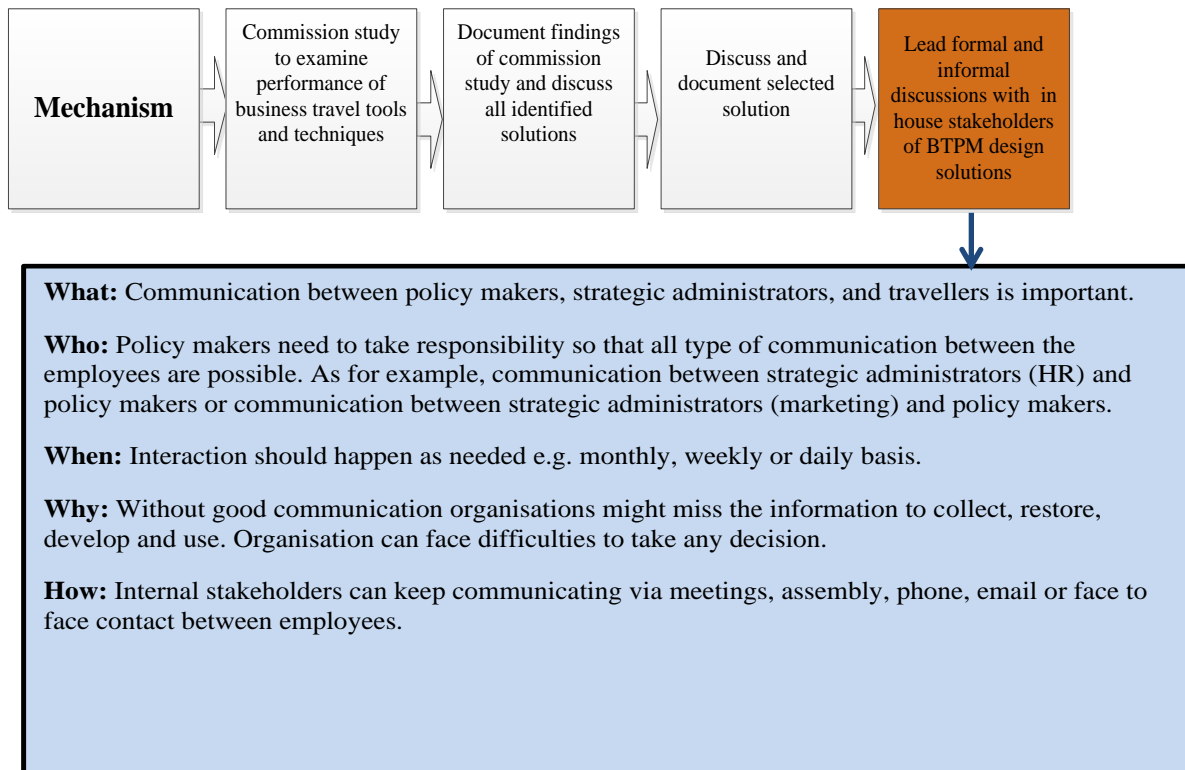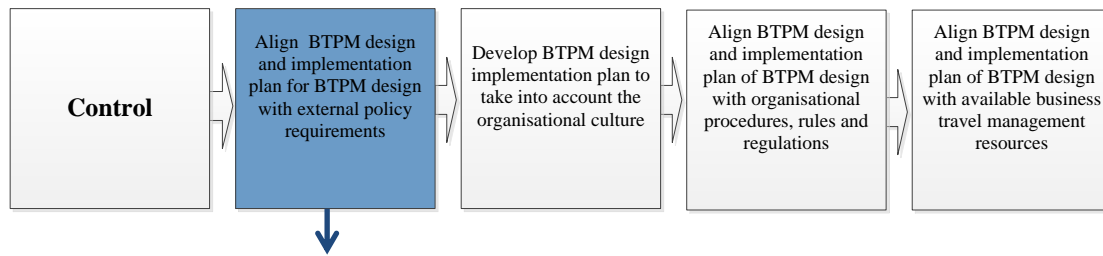
Figure 9.33 Process Formulation Mechanism (Lead Formal and Informal Discussions with in House Stakeholders of BTPM Design Solutions).

Phase Two- Process Formulation -

Control

| Control | Align BTPM design and implementation plan for BTPM design with external policy requirements | Develop BTPM design implementation plan to take into account the organisational culture | Align BTPM design and implementation plan of BTPM design with organisational procedures, rules and regulations | Align BTPM design and implementation plan of BTPM design with available business travel management resources |

What: Business travel process management system design and implementation plans need to be aligned with the governmental policy.

Who: Strategic administrators (HR) need to identify all the governmental policy and align the organisation policy with it. Therefore strategic administrators (HR) need to get approval from the policy makers.

When: Before designing the process and formulating an implementation plan.

Why: Organisation has to face legal complaints if it does not comply with the government policy. Government policies help to structure the organisation process effectively.

How: Strategic administrators (HR) need to follow the government policies related to business travel and if there are any new changes in the policies. Strategic administrators therefore need to amend the organisation policies in light of the government policies. Finally the strategic administrator (HR) needs to get approval from the policy makers of new amendments.

Figure 9.34 Process Formulation Control (Align BTPM Design and Implementation Plan for BTPM Design with External Policy Requirements).

Phase Two- Process Formulation – Control

What: Strategic administrators can align business the travel process management system (BTPMS) and the implementation plan with the traveller's needs or demands, organisational regular practice.

Who: Strategic administrators (HR) need to identify the organisational culture.

When: Before designing the process strategic administrators (HR) need to observe if the new process would be easily adoptable by the organisation employees.

Why: If the system does not align with the organisational culture then it is difficult to establish and travellers also cannot adopt the system.

How: Strategic administrators need to observe the travellers behaviour, practices and identify what is suitable for the travellers.

Figure 9.35 Process Formulation Control (Develop BTPM design implementation plan to take into account the organisational culture).
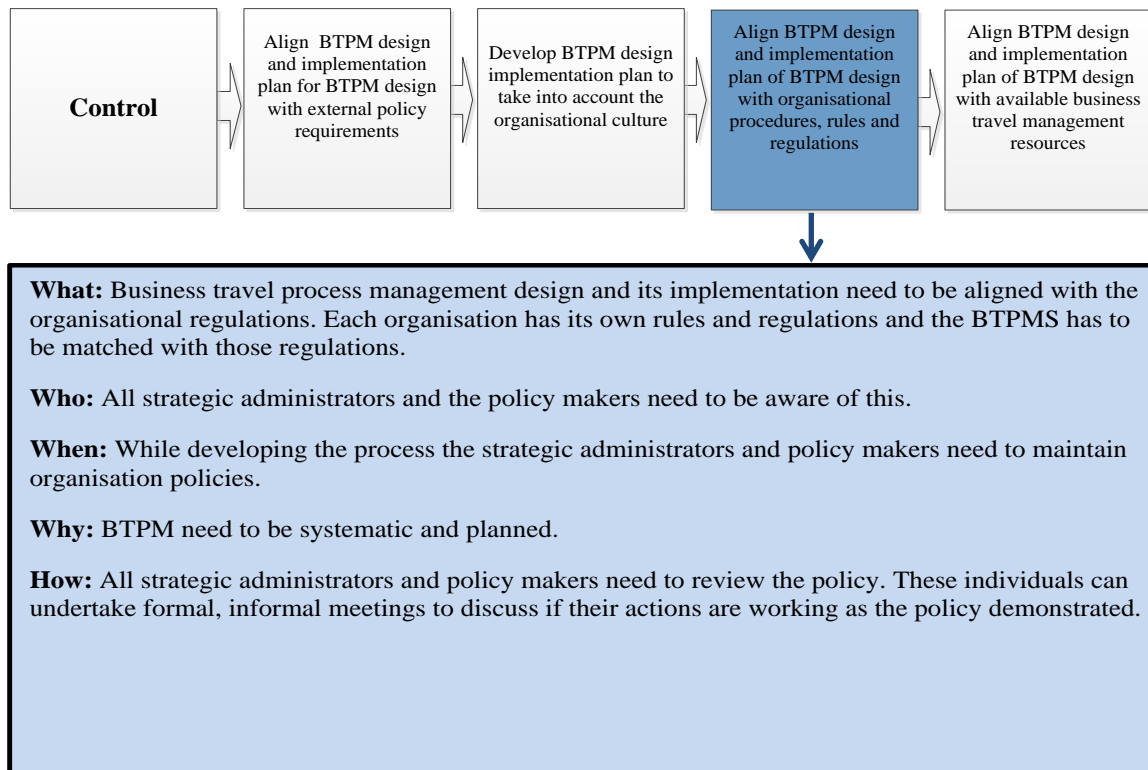
Phase Two- Process Formulation -

Control

| Control | Align BTPM design and implementation plan for BTPM design with external policy requirements | Develop BTPM design implementation plan to take into account the organisational culture | Align BTPM design and implementation plan of BTPM design with organisational procedures, rules and regulations | Align BTPM design and implementation plan of BTPM design with available business travel management resources |

What: Business travel process management design and its implementation need to be aligned with the organisational regulations. Each organisation has its own rules and regulations and the BTPMS has to be matched with those regulations.

Who: All strategic administrators and the policy makers need to be aware of this.

When: While developing the process the strategic administrators and policy makers need to maintain organisation policies.

Why: BTPM need to be systematic and planned.

How: All strategic administrators and policy makers need to review the policy. These individuals can undertake formal, informal meetings to discuss if their actions are working as the policy demonstrated.

Figure 9.36 Process Formulation Control (Align BTPM design and implementation plan of BTPM design with organisational procedures, rules and regulations).

Phase Two- Process Formulation -

Control

What: Strategic administrators need to design the BTPM in a way that the system can be run with the available budget in the organisation.

When: Strategic administrators (finance) would be responsible for identifying how the business travel process management system can be run by available budget.

Why: Organisation needs to make sure they can afford the system and cannot do anything beyond their capacity.

How: Strategic administrators (finance) must be aware of the budget all the time and inform the limit to the policy makers. Strategic administrators (finance) also can demonstrate the entire organisation employee about the outline of the resources.

Figure 9.37 Process Formulation Control (Align BTPM design and implementation plan of BTPM design with available business travel management resources).

Phase Two- Process Formulation - Output

| Output | Develop detailed BTPM design | Assist the organisation to develop BTPM design | Formulate implementation plan for BTPM design |

What: Organisations need to develop the BTPM detailed design to demonstrate the travellers.

Who: Strategic administrators (HR) need to develop the design initially then can get approval from the policy makers.

When: Strategic administrators need to review the old process and alter the process with new changes if needed.

Why: The world is moving towards development and organisations need to change their business travel management process with new development. Also if the old system has any pros and cons the organisation needs to identify the gap or issues and amend the old process.

How: Strategic administrators can develop the BTPM design by analysing all the issues. Strategic administrators (HR) then needs to get and approval from the policy makers about the developed design. Finally the strategic administrators can promote the developed design in a set of manuals or via online links/document.

Figure 9.38 Process Formulation Output (Develop detailed BTPM design).

Phase Two- Process Formulation -Output

What: Organisations often may need to develop BTPM with the help of external consultants, who are specialised to develop systems like any software.

Who: External consultants can help the organisation to understand and develop new systems.

When: Strategic administrators need to review the old process and alter the process with new changes if needed.

Why: Organisations often may not have specialised people and need to bring external consultants to develop a system/design.

How: A system is needed to fulfil the process gaps, issues. However all the issues need to be detected before the consultant start working. Consultants need to know the context and then can develop a final system/ process for the organisation. This process can be applied in a large organisation who can afford to appoint a consultant. The organisations who cannot appoint consultant, also have lot of issues related to business travel they need to have solutions by the strategic administrators and policy makers.

Figure 9.39 Process Formulation Output (Assist the organisation to develop BTPM design).

Phase Two- Process Formulation -Output
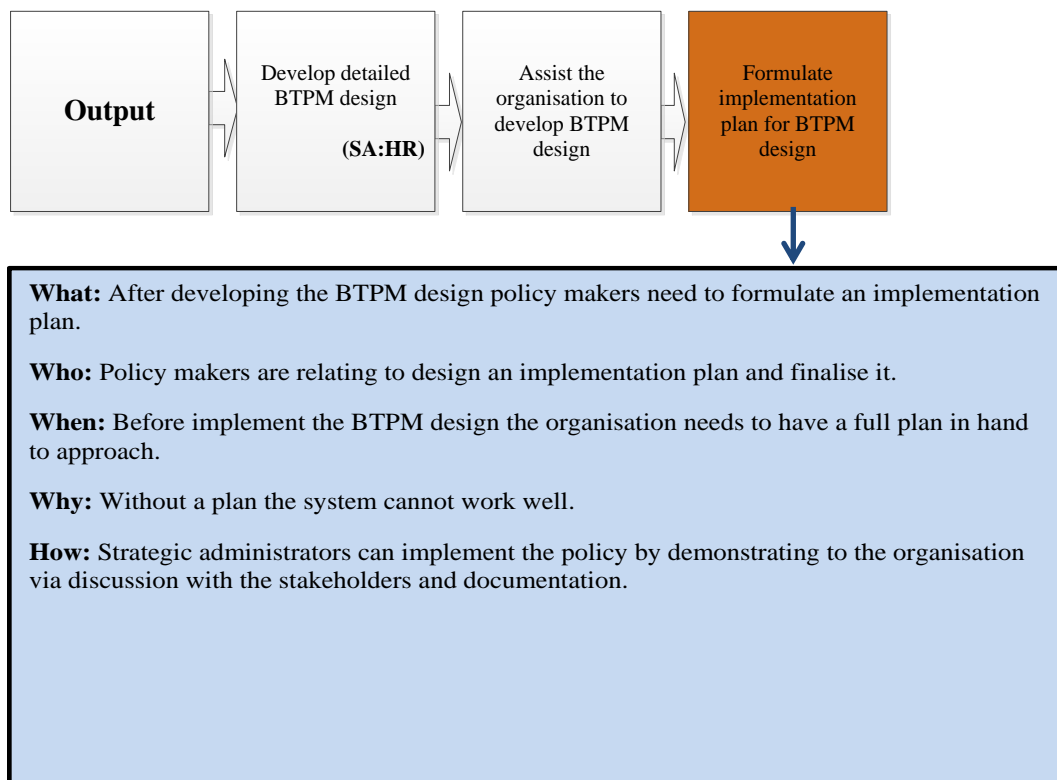
Figure 9.40 Process Formulation Output (Formulate implementation plan for BTPM design).

9.4.3 Phase Three: Implementation

In this stage (Figure 9.26), the organisation needs to implement the conceptual (BTPM) framework design which is composed of several policies and agendas. "*It is necessary to formulate and communicate the resulting policy and to engage in more detailed design of associated programmes*" (Fischer *et al.,* 2007, p 85). For effective BTPM design implementation it is essential that potential issues are considered in advance of implementation and that appropriate procedures are designed into the BTPM programme. For this reason the process needs to be fully designed or mapped before being implemented. Once BTPM design is complete, and its component programmes are under way, an attempt needs to be made to monitor its progress and to check whether actual performance is living up to earlier expectations. It can be applied in a group or one department to test the result.

Holma (2012) and Douglas and Lubby (2009) mentioned that there are two main motivations for implementing business travel policies: a) to prevent travellers from over spending and b) to demonstrate the organisation has a supplier management mechanism. Conducting purchases from preferred suppliers are common ways to save on travel costs (Douglas and

Lubbe, 2010). "*Organisations have developed policies on service purchases and have a set of approved suppliers to business travel purchases. However, strict employee compliance is still necessary in order to fulfil established supplier contracts and to benefit from purchasing synergies*" (Holma, 2012, p. 61).

The case study and survey results also revealed that organisations struggle to implement a new policy because of travellers' lack of willingness to adopt the new policy. Also there are some other barriers for implementing business travel policies, such as: issues of cost and time savings, carbon emissions, work-life balance and standards for the organisation to control by a structured management.

The main activities included in this phase are:

- To pilot the implementation design, modify the design, introduce the internal and external stakeholders to the BTPM design, train travellers to use the new system;

- To ensure all the tools and technologies related to business travel processes are operational;

- To monitor the travel booking, travel activity and also the training processes;

- To ensure the implementation process is aligned with Governmental and organisational policies, also the process is aligned with the organisational culture and organisational available resources; and

- To ensure all internal and external stakeholders are following the organisational processes.

Figure 9.41 has been added for a better view of the diagram than the full diagram (Figure 9.6). The detailed actionable plan of the process formulation phase can be found in Figures 9.42-9.64.

PHASE THREE
Process Implementation

Hard Gate

Input	Pilot BTPM design implementation plan to raise any operational issues **(SA:HR)**	Modify design of BTPM to take account of pilot study findings **(SA:HR)**	Introduce to internal stakeholders how new BTPM design will work **(SA:HR)**	Apply BTPM design in practice, identify the trainings required for the travellers **(SA:HR)**	Monitor performance of BTPM design against KPIs **(SA:ALL)**	Understand BTPM design and function accordingly	Understand BTPM design and function accordingly	Understand BTPM design and function accordingly
Mechanism	Modify administrative procedures to accommodate BTPM design **(SA:HR)**	Clarify roles and responsibilities with involved personnel **(SA:HR)**	Ensure BT 'Tools' (e.g. IT, OBS: Online Booking Software, Video conferencing equipment) are operational **(SA:IT)**	Develop and apply appropriate system monitoring procedure **(SA:IT)**	Set up training activities **(SA:HR)**	Participate in training		
Control	Ensure operation of BTPM design meets external policy requirements **(SA:HR)**	Ensure operation of BTPM design aligns with organisational culture **(SA:HR)**	Ensure operation of BTPM design aligns with organisational procedures, rules and regulations **(SA:ALL)**	Ensure operation of BTPM design aligns with available business travel management resources **(SA:F)**				
Output	Manage BTPM design **(SA:HR)**	Collect BTPM design performance monitoring data **(SA:HR)**	Function according to BTPM design	Function according to BTPM design	Function according to BTPM design			

Implement and imply the process and policies for the organisation

Figure: 9.41 Phase Three Process Implementation

The process formulation stage consists of 23 steps. Each step is described in the figure with the actions:

Phase Three - Process Implementation -Input

| Input | Pilot BTPM design implementation plan to raise any operational issues | Modify design of BTPM to take account of pilot study findings | Introduce to internal stakeholders how new BTPM design will work | Apply BTPM design in practice, identify the trainings required for the travellers |

| Monitor performance of BTPM design against KPIs | Understand BTPM design and function accordingly b line managers | Understand BTPM design and function accordingly by travellers | Understand BTPM design and function accordingly by TMCs |

What: After developing a system, the organisation needs to double check that the new system can work well for the organisation and this can be done by a pilot study in organisation

Who: Strategic administrator (HR) is involved to design implementation plan.

When: After designing the implementation plan the organisation can confirm which system to select for travel booking and managing.

Why: Once the system is in operation it is difficult to make any changes, so it is better to do a pilot study before and amend the system if required.

How: It can be done by focus group study among system developer and traveller or via in house survey and documenting all the issues afterwards.

Figure 9.42 Process Implementation Input (Pilot BTPM design implementation plan to raise any operational issues).

Phase Three- Process Implementation -
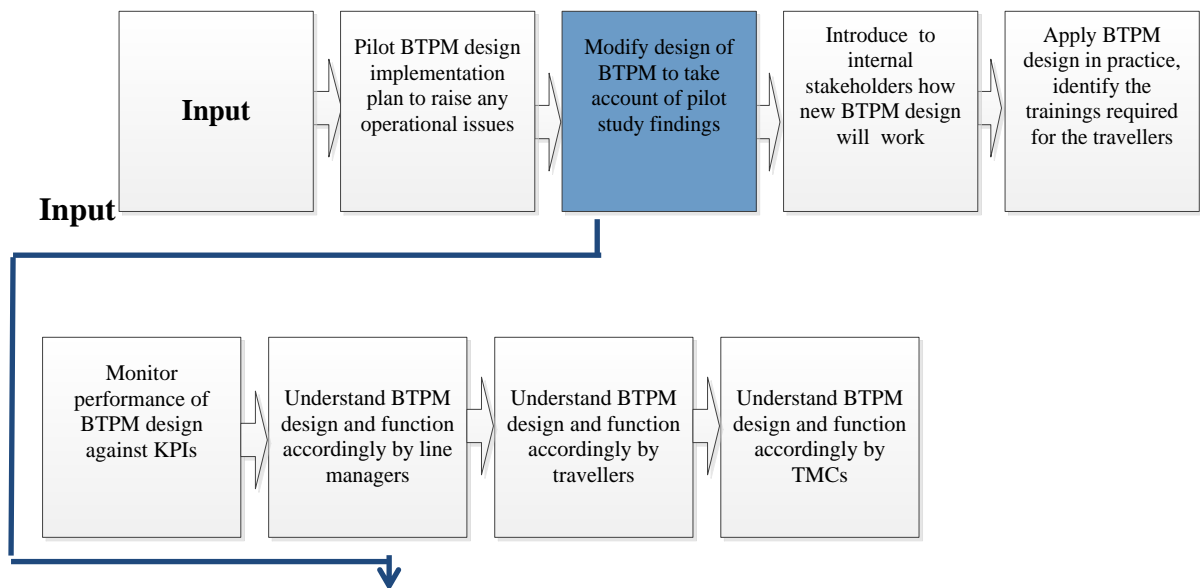
Figure 9.43 Process Implementation Input (Modify design of BTPM to take account of pilot study findings).

Phase Three- Process Implementation -

Input	Pilot BTPM design implementation plan to raise any operational issues	Modify design of BTPM to take account of pilot study findings	Introduce to internal stakeholders how new BTPM design will work	Apply BTPM design in practice, identify the trainings required for the travellers

Input

Monitor performance of BTPM design against KPIs	Understand BTPM design and function accordingly by line managers	Understand BTPM design and function accordingly by travellers	Understand BTPM design and function accordingly by TMCs

What: Once the BTPM design is finalised the organisation needs to demonstrate the system to the line managers and travellers.

Who: Strategic administrators (HR) generally involve with all introductions. Strategic administrators need to go through with the process with all stakeholders (line managers, other strategic administrators, and travellers) who are related to business travel.

When: As soon the system is ready to use the strategic administrators (HR) need to demonstrate the process and policies to the internal stakeholders who needs to use the process.

Why: Travellers need proper guidance to use the system/ process.

How: Strategic administrators (HR) can introduce the process to the internal stakeholders via training, meetings, giving manual books/ leaflets and via online documents.

Figure 9.44 Process Implementation Input (Introduce to internal stakeholders how new BTPM design will work).

Phase Three- Process Implementation -
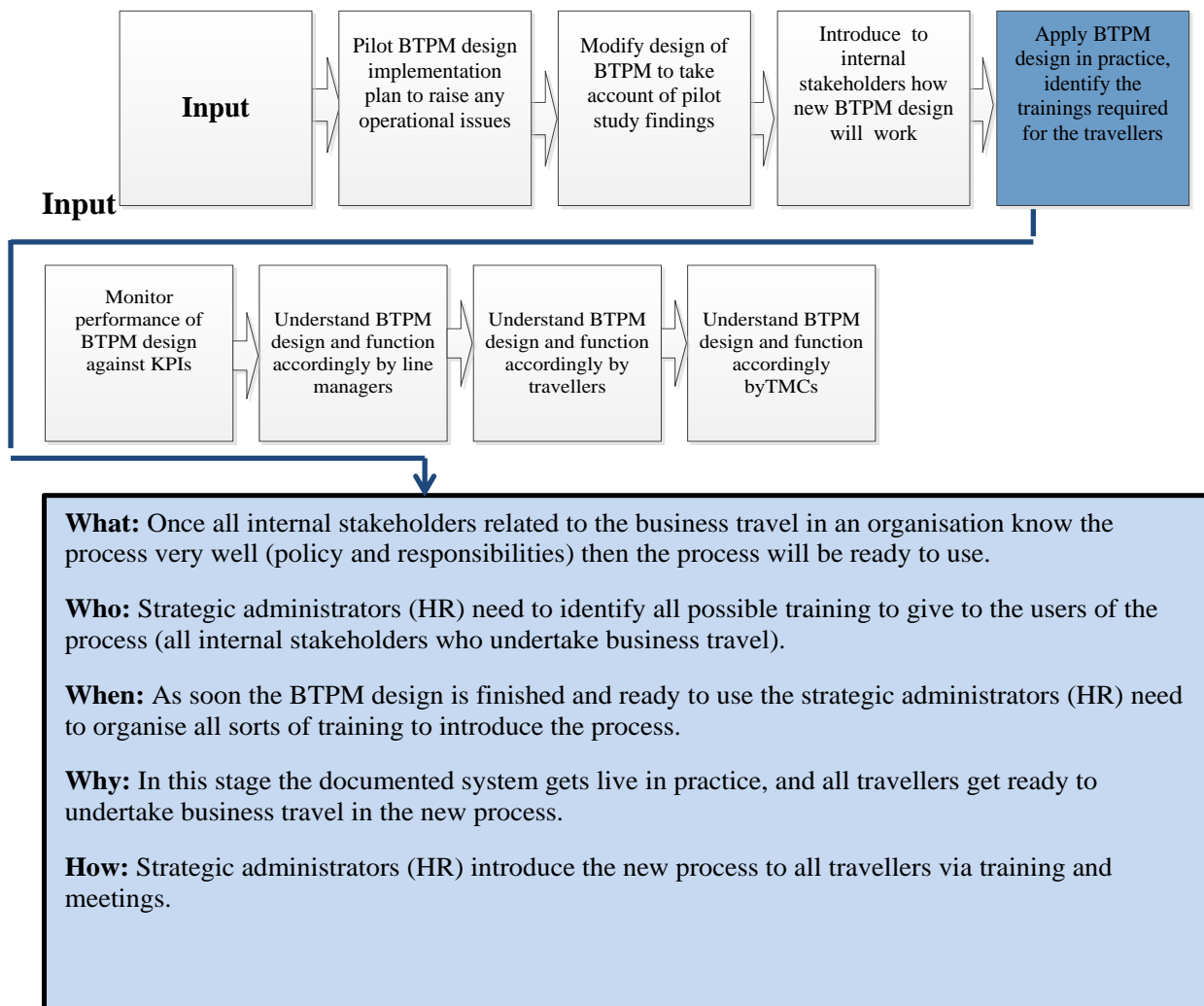
Figure 9.45 Process Implementation Input (Apply BTPM design in practice, identify the trainings required for the travellers).

Phase Three- Process Implementation -

| Input | Pilot BTPM design implementation plan to raise any operational issues | Modify design of BTPM to take account of pilot study findings | Introduce to internal stakeholders how new BTPM design will work | Apply BTPM design in practice, identify the trainings required for the travellers |

Input

| Monitor performance of BTPM design against KPIs | Understand BTPM design and function accordingly by line managers | Understand BTPM design and function accordingly by travellers | Understand BTPM design and function accordingly by TMCs |

What: Once the system is in use the organisation needs to keep monitoring the system against KPIs. BTPM design performance needs to be assessed against KPIs. The recommended KPIs for all types of business organisations are:

- Cost effective (measure mileage per gallon of any car travel, total expenditure on public transport, number of flights);
- Time effective (use of video conferencing facilities and ensure data is collected on travel avoided by video conferencing, and duration of travel); and
- Business Standard (measuring the organisation's performance each year by recording achievements).

Who: All strategic administrators need to monitor the performances of BTPM design.

When: While running the new system the organisation needs to monitor if the process is working correctly.

Why: Monitoring is important so that the system does not raise any issues.

How: All strategic administrators can monitor the process via observation and collaborating with travellers.

Figure 9.46 Process Implementation Input (Monitor performance of BTPM design against KPIs).

Phase Three- Process Implementation -

Figure 9.47 Process Implementation Input (Understand BTPM design and function accordingly by line managers).

Phase Three- Process Implementation -

| Input | Pilot BTPM design implementation plan to raise any operational issues | Modify design of BTPM to take account of pilot study findings | Introduce to internal stakeholders how new BTPM design will work | Apply BTPM design in practice, identify the trainings required for the travellers |

Input

| Monitor performance of BTPM design against KPIs (SA:ALL) | Understand BTPM design and function accordingly by line managers | Understand BTPM design and function accordingly by travellers | Understand BTPM design and function accordingly by TMCs |

What: Line managers need to understand the system and follow the processes to guide business travellers under their supervision.

Who: Line managers needs to supervise travellers under their supervision and the main job for the line managers to manage business travel is to approve travellers' travel request forms.

When: Once the new system is live the line managers need to be aware of the change in system. Strategic administrators however can give demonstration to the line managers.

Why: Travellers cannot contact the strategic administrators direct each time so that they need to contact with their line manager in the first instance and for this reason the line managers need to understand the system. In some cases the line managers are travellers themselves.

How: Via reading and following the manual book/documents of the new system; internal meetings with the strategic administrators.

Figure 9.47 Process Implementation Input (Understand BTPM design and function accordingly by line managers).

Phase Three- Process Implementation -

Figure 9.48 Process Implementation Input (Understand BTPM design and function accordingly by travellers).

Phase Three- Process Implementation -

Input

| Input | Pilot BTPM design implementation plan to raise any operational issues | Modify design of BTPM to take account of pilot study findings | Introduce to internal stakeholders how new BTPM design will work | Apply BTPM design in practice, identify the trainings required for the travellers |

| Monitor performance of BTPM design against KPIs | Understand BTPM design and function accordingly by line managers | Understand BTPM design and function accordingly by travellers | Understand BTPM design and function accordingly by TMCs |

What: All travellers need to understand the BTPM design and follow the rules of the processes. Some travellers can be the policy makers themselves and all level of the travellers need to comply with the organisational rules.

Who: All travellers need to understand and follow the rules of the process.

When: While using the new system the travellers need to understand the system and organisational training can help them to understand. Therefore, travellers need to attend all the training provided by the organisation.

Why: If the traveller does not understand the system they would not be able to follow the rules and that can cause loss for the organisation.

How: Travellers need to attend all the training sessions, meetings called by the organisation. Also they need to follow the system as demonstrated.

Figure 9.48 Process Implementation Input (Understand BTPM design and function accordingly by travellers).

Phase Three- Process Implementation -

Input

What: Travel management companies (TMCs) need to understand the BTPM design of any organisation they deal with and follow the regulations accordingly.

Who: All TMCs who are involved in business need to follow their customers' rules and regulations.

When: As soon as any TMC agrees to be an external stakeholder for any organisation the TMCs has responsibilities to follow organisational rules.

Why: TMC plays a vital part for booking travel and they need to know how does the total BTPM design works for an organisation, so if any traveller does anything wrong the TMC can locate it.

How: TMCs can improve their understanding by reading and learning the BTPM design manuals or by communicating with the strategic administrators of the organisations.

Figure 9.49 Process Implementation Input (Understand BTPM design and function accordingly by TMCs).

Phase Three- Process Implementation -

Mechanism
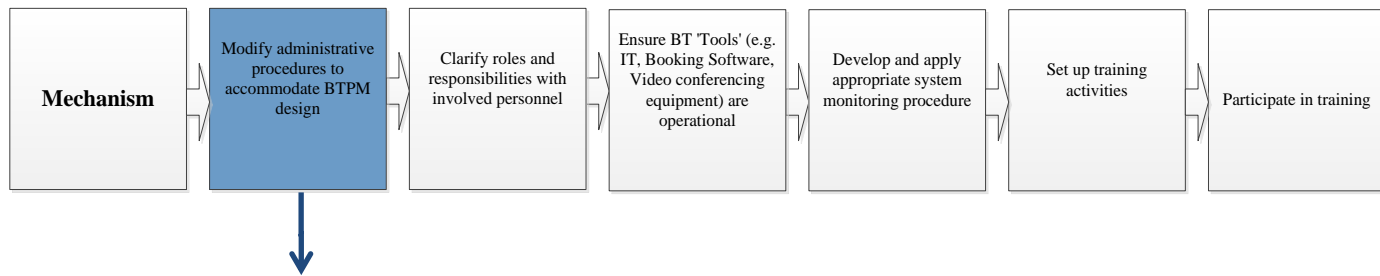
What: Business travel administrative process are mostly done by the travellers themselves and by the Online Booking Software. Also strategic administrators are involved with some high level administrative jobs. Organisations need to fix business travel management process in such a way that all administrative procedures can take place smoothly.

Who: Strategic administrators (HR) can modify the administrator procedure to accommodate BTPM design.

When: After identify the solution in process formulation stage the strategic administrators need to modify the current business travel management process to solve travel-related issues.

Why: To improve the on-going system this practice is needed.

How: Strategic administrators (HR) can identify process-related issues and solutions and by emerging BTPM they can modify the administrative system.

Figure 9.50 Process Implementation Mechanism (Modify administrative procedures to accommodate BTPM design).

Phase Three- Process Implementation -

Mechanism

Figure 9.51 Process Implementation Mechanism (Clarify roles and responsibilities with involved personnel).

Phase Three- Process Implementation -

Mechanism
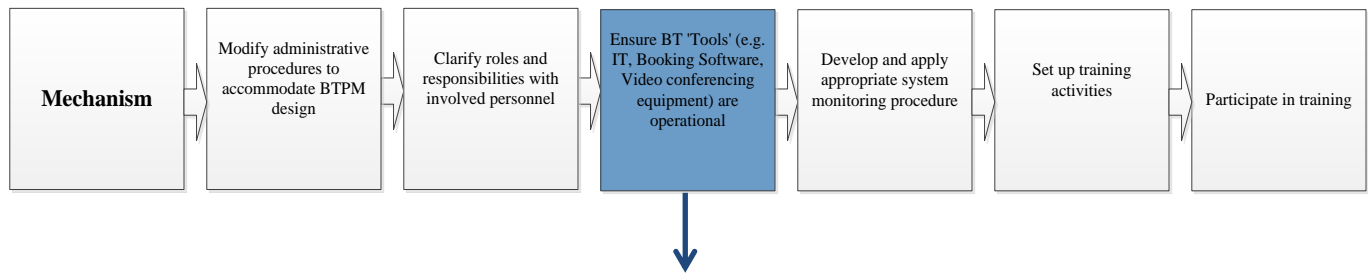
What: Organisation must have tools and technologies (video conferencing, OBS or Online Booking System) that are needed in operational condition.

Who: Strategic administrator (IT) is responsible to ensure all the technologies are in order.

When: Before operate the new system the organisation needs to make sure the travel booking tools and travel undertaking technologies are in order. Organisation can hire external IT consultant if needed.

Why: Without proper tools the system cannot be used.

How: With the help of technicians or with the help of IT department and event planner organisation can ensure the technologies are in place. In case of any disorder the strategic administrator (IT) need to report to the strategic administrator (HR) to inform to the policy makers to take any action or sanction the budget to improve the technologies.

Figure 9.52 Process Implementation Mechanism (Ensure BT 'Tools' e.g. IT, Booking Software, Video conferencing equipment are operational).

Phase Three- Process Implementation -

Mechanism

What: Organisation needs to give the right training to travellers to introduce BTPM design.

Who: Strategic administrator (IT) can develop any new software and can train travellers with the help of all strategic administrators.

When: Before using the BTPM design the travellers need to learn how the process works and what the policies related to it are.

Why: Travellers need to know the system/process in and out after the organisation develops the new system/process.

How: Strategic administrators (IT) can undertake training sessions, assembly, meeting and all other strategic administrators can help by demonstration, written documents, email, and via webpage development.

Figure 9.53 Process Implementation Mechanism (Develop and apply appropriate system monitoring procedure).

Phase Three- Process Implementation -

Mechanism

What: Organisation needs to give the right training to travellers to introduce BTPM design.

Who: Strategic administrator (IT) can develop any new software and can train travellers with the help of all strategic administrators.

When: Before using the BTPM design the travellers need to learn how the process works and what the policies related to it are.

Why: Travellers need to know the system/process in and out after the organisation develops the new system/process.

How: Strategic administrators (IT) can undertake training sessions, assembly, meeting and all other strategic administrators can help by demonstration, written documents, email, and via webpage development.

Figure 9.54 Process Implementation Mechanism (Develop and apply appropriate system monitoring procedure).

Phase Three- Process Implementation -

Mechanism

| Mechanism | Modify administrative procedures to accommodate BTPM design | Clarify roles and responsibilities with involved personnel | Ensure BT 'Tools' (e.g. IT, Booking Software, Video conferencing equipment) are operational | Develop and apply appropriate system monitoring procedure | Set up training activities | Participate in training |
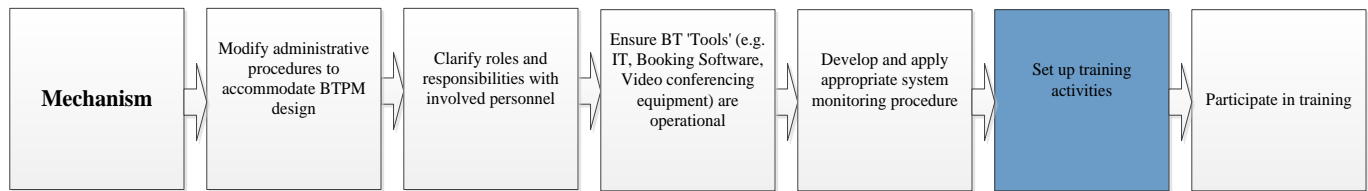
What: Strategic administrators need to develop a monitoring system so that they can identify any issue with the system.

Who: Strategic administrator (HR) can organise all sorts of training. If the strategic administrator (IT) needs to give demonstration the strategic administrator (HR) can bring which people need the training, which the IT person would not know.

When: All training needs to be undertaken before using the system. Travellers need to know the system very well so that they do not waste time by booking incorrectly.

Why: Continuous monitoring of organisation's travel practices is needed by the strategic administrators. Also, the travellers need to use the system properly, for that they need training.

How: Strategic administrators (HR) and line managers needs to communicate with the travellers time to time via meetings and arrange training sessions as needed.

Figure 9.55 Process Implementation Mechanism (Set up training activities).

Phase Three- Process Implementation -

Mechanism

| Mechanism | Modify administrative procedures to accommodate BTPM design) | Clarify roles and responsibilities with involved personnel | Ensure BT 'Tools' (e.g. IT, Booking Software, Video conferencing equipment) are operational | Develop and apply appropriate system monitoring procedure | Set up training activities | Participate in training |
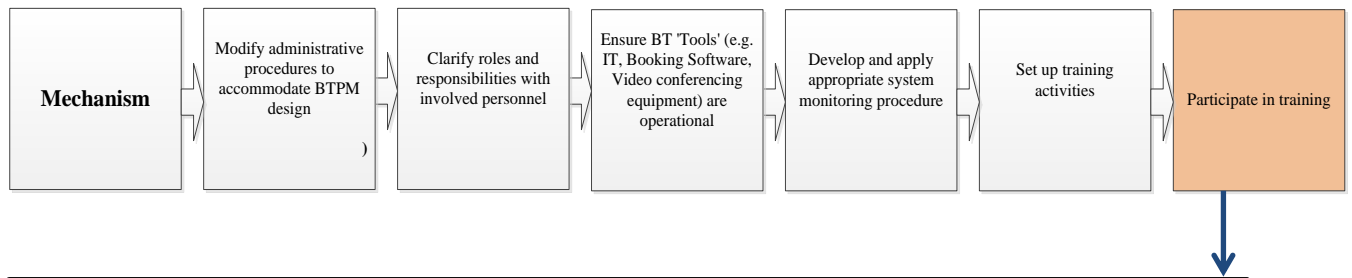
What: Travellers need to attend all type of training offered by the organisation.

Who: All travellers are responsible for undertaking training on business travel processes organised by the organisation.

When: Training will be needed before applying the process or when a new traveller arrives.

Why: Travellers need to have knowledge of using the online booking process. Lack of traveller knowledge can cause serious problems like time loss for the traveller, and money loss for the organisation.

How: All training can be held in-house by the strategic administrators so the travellers can attend all the training sessions.

Figure 9.56 Process Implementation Mechanism (Participate in training).

Phase Three- Process Implementation –

Control

| Control | Ensure operation of BTPM design meets external policy requirements | Ensure operation of BTPM design aligns with organisational culture | Ensure operation of BTPM design aligns with organisational procedures, rules and regulations | Ensure operation of BTPM design aligns with available business travel management resources |

What: Organisation needs to ensure that the BTPMS complies with the government policy.

Who: Strategic administrators (HR) are responsible for this step.

When: While using the BTPM design the organisation needs to confirm that the process meets all the external policies.

Why: Organisation cannot break any governmental rule while implementing or operating the system, such as if the government suggest reporting the carbon calculation the organisations need to do so. Strategic administrators also need to confirm the travellers are not breaking any governmental law while undertaking the travel such as damaging any governmental resources while travelling.

How: Strategic administrators (HR) need to check that the travellers are not breaking any governmental rules. Strategic administrators can observe the situation or communicate with the travellers via meetings.

Figure 9.57 Process Implementation Control (Ensure operation of BTPM design meets external policy requirements).

Phase Three - Process Implementation

Control

| Control | Ensure operation of BTPM design meets external policy requirements | Ensure operation of BTPM design aligns with organisational culture | Ensure operation of BTPM design aligns with organisational procedures, rules and regulations | Ensure operation of BTPM design aligns with available business travel management resources |

What: Strategic administrators (HR) need to ensure the BTPM design is implemented correctly in the organisations and travellers are adopting with the system.

Who: Strategic administrators (HR) are usually involved with the observation of organisational culture, such as traveller's behaviour, practices, knowledge.

When: Before developing and using BTPM design organisation needs to identify if the travellers can adopt the system.

Why: If BTPM design does not align with the organisational culture then it is difficult to establish as travellers cannot adopt the system.

How: Strategic administrators (HR) need to observe the traveller's behaviour and identify what is suitable for the traveller before developing and using a new system.

Figure 9.58 Process Implementation Control (Ensure operation of BTPM design aligns with organisational culture).

Phase Three- Process Implementation -

Control

Figure 9.59 Process Implementation Control (Ensure operation of BTPM design aligns with organisational procedures, rules and regulations).

Phase Three - Process Implementation -

Control

| Control | Ensure operation of BTPM design meets external policy requirements | Ensure operation of BTPM design aligns with organisational culture | Ensure operation of BTPM design aligns with organisational procedures, rules and regulations | Ensure operation of BTPM design aligns with available business travel management resources |

What: Strategic administrators (finance) can set the business travel budget according to the turnover and review the process to make it cost effective.

Who: Strategic administrator (finance) can ensure the new process is aligned with the organisational resources.

When: While using BTPMS the strategic administrators need to ensure that the system is compiled with the available resources.

Why: Organisation needs to afford the system and cannot do anything beyond their capacity.

How: Strategic administrators (finance) need to be aware of the budget, resources all the time and inform the limit to the policy makers. Thus it will be possible to control the cost limit for business travel management process.

Figure 9.60 Process Implementation Control (Ensure operation of BTPM design aligns with available business travel management resources).

Phase Three- Process Implementation -

Output

What: Strategic administrators (HR) need to manage the BTPM design efficiently.

Who: Strategic administrator (HR) are responsible for all documentation of the manuals of the processes and arranging training programs.

When: After implementing BTPM design organisation need to focus on managing the process efficiently.

Why: Strategic administrators (HR) are mostly involved in designing, operating, monitoring and reviewing BTPM design and can keep communication with the travellers to manage the process.

How: Strategic administrator (HR) can manage the process through knowledge, and efficiency. They need to monitor and communicate with the travellers to manage the process correctly.

Figure 9.61 Process Implementation Output (Manage BTPM design).

Phase Three- Process Implementation -
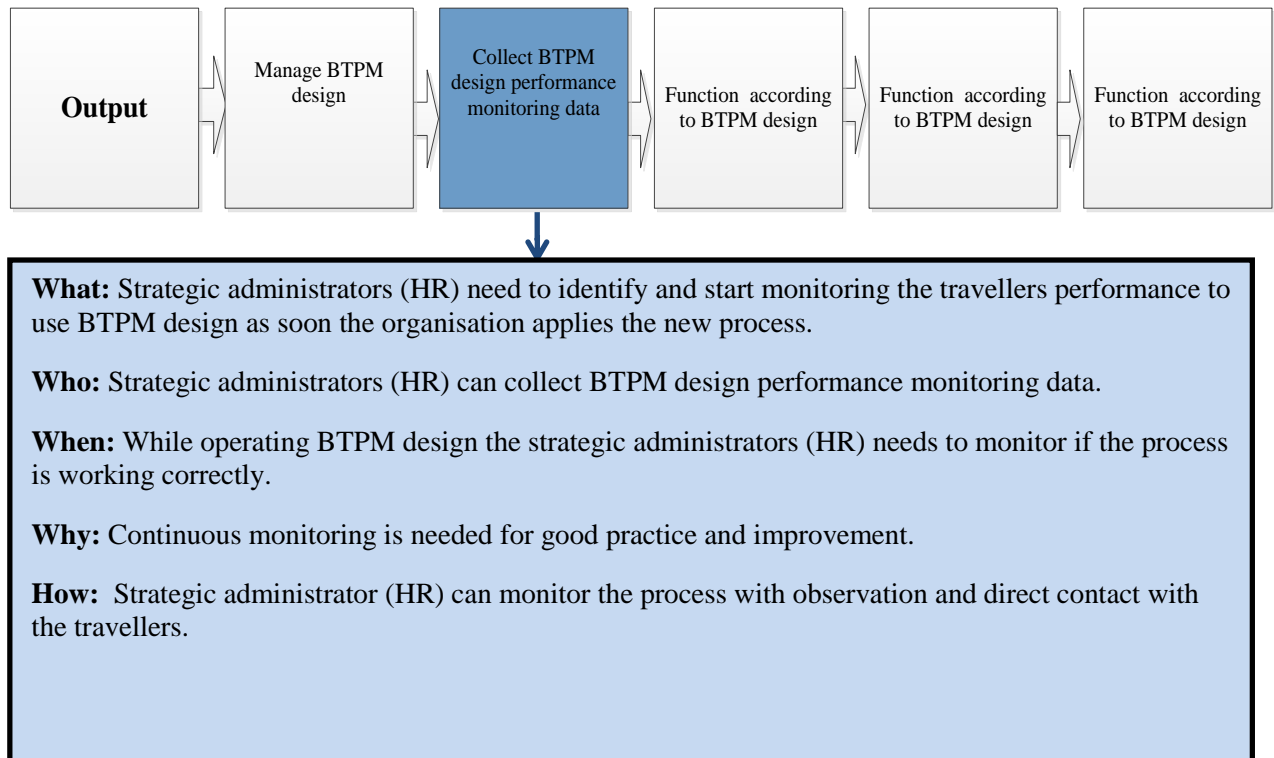
Output

Figure 9.62 Process Implementation Output (Collect BTPM design performance monitoring data).

Phase Three- Process Implementation -

Output

Output	Manage BTPM design	Collect BTPM design performance monitoring data	Function according to BTPM design
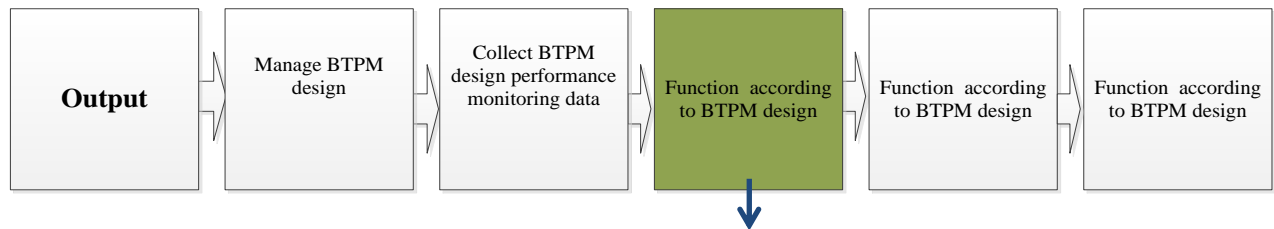
What: Line managers need to understand the BTPM design and follow the rules of the processes.

Who: Line managers need to understand and apply the process correctly.

When: While using the new system the line managers play a vital role to approve the traveller's travel request form, so line managers need to perform their role effectively.

Why: If the line managers do not understand the system they would not be able to follow the rules and that can cause loss for the organisation.

How: Learning properly from the meetings, training by the organisation and by following the system as demonstrated.

Figure 9.63 Process Implementation Output (Function according to BTPM design)

Phase Three-Process Implementation -

Output

Figure 9.64 Process Implementation Output (Function according to BTPM design).

Phase Three- Process Implementation -

Output

Figure 9.65 Process Implementation Output (Function according to BTPM design).

9.4.4 Phase Four: Evaluation

After the BTPM design is implemented more fundamental reviews are needed to drive the BTPM design. These will involve asking whether the BTPM design has been successful in achieving the outcomes and the desired gap/barriers to secure the desired inputs (focus implementation, monitoring and control). The possibility of carrying out such an evaluation will depend on a prior specification of what the desired outcomes are. In addition, designing the BTPM in such a way as to enable one or more evaluation techniques to be employed (i.e audit, survey), avoids it being difficult or impossible to determine whether or not the BTPM design is working as intended.

The activities included in this phase are as follows:

- To assess the performance of BTPM design against KPIs (KPIs that were identified in Phase Two);

- To review the performance by the policy makers so that the organisation can fulfil the objectives for undertaking business travel effectively, and also the Actionable Plan works well;
- To undertake commission studies by Strategic administrators to analyse and monitor data via market research or organisational staff survey;
- To evaluate the business travel management process to ensure it is performing according to Governmental and organisational laws, organisational culture and resources.
- To identify possible areas of improvement of the business travel process management area.

Figure 9.65 has been added for a better view of the diagram than the full diagram (Figure 9.6). The detailed actionable plan of the process formulation phase can be found in Figures 9.66-76.

Figure 9.66 Phase Four Process Evaluation

The process formulation stage consists of eleven steps. Each of the steps is described in the figure with the actions:

Phase Four-Evaluation -

Input

| Input | Assess the performance of BTPM design against KPIs | Review the performance of BTPM design from broader organisational perspective |
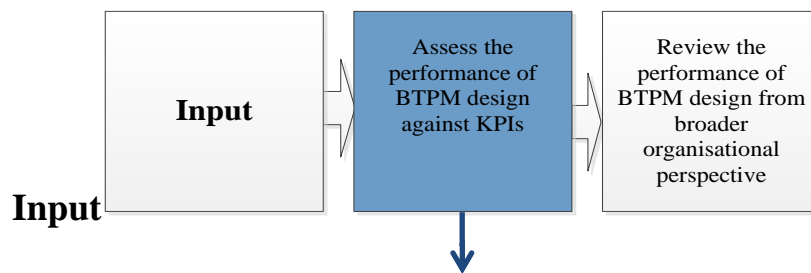
What: Organisation needs to monitor the BTPM design against KPIs. The recommended KPIs for all types of business organisations are:

- Cost effective (measure mileage per gallon of any car travel, total expenditure on public transport, number of flights);
- Time effective (use of video conferencing facilities and ensure data is collected on travel avoided by using video conferencing, time taken for travel); and
- Business standard (Measuring the organisation's performance each year by recording achievements).

Who: All strategic administrators need to monitor the BTPM design against KPIs by observing travellers' behaviour towards BTPM design. Strategic administrator can monitor if the travel is undertaken in cost effective way, if the virtual travel is undertaken where possible, if the business is achieving its goal end of the year. The traveller's records of undertaking business travel will help to address these.

When: While operating BTPM design.

Why: Continuous monitoring is needed to control and improve the system.

How: Strategic administrator can monitor travellers by observing the travellers' records of travel and by meeting with travellers if needed.

Figure 9.67 Process Evaluation Input (Assess the performance of BTPM design against KPIs).

Phase Four-Evaluation -

Input

Input

What: Policy makers need to review the BTPM design and monitor the whole organisation's performance while using BTPM design.

Who: Policy makers are responsible at this stage for monitoring all stakeholders in the organisation.

When: From the start to the end of the process of BTPM operation.

Why: Policy makers need to ensure the organisation benefits from the use of BTPM design and if not they need to take actions.

How: Policy makers can keep links with travellers via strategic administrators. Policy makers also need to address issues, bottlenecks of the BTPM design that rose by the strategic administrators. Policy maker need to solve all complains regarding the process by altering the policy, adapting new system.

Figure 9.68 Process Evaluation Input (Review the performance of BTPMS from broader organisational perspective).

Phase Four-Evaluation -

Mechanism

Figure 9.69 Process Evaluation Mechanism (Commission study to analyse monitoring data and make recommendations).

Phase Four-Evaluation -

Mechanism

Mechanism	Commission study to analyse monitoring data and make recommendations	Discuss implications with organisational Policy Makers

What: Strategic administrator (HR) needs to discuss any improvement needed with the policy makers.

Who: Strategic administrators (HR) are responsible for this stage.

When: while evaluating the BTPMS process strategic administrator (HR) needs to discuss the implications with the policy makers.

Why: Policy makers need to aware of any changes in the evaluation process so the strategic administrators (HR) need to report to the policy makers.

How: Strategic administrators (HR) need to contact policy makers via meetings and inform them of the implications.

Figure 9.70 Process Evaluation Mechanism (Discuss implications with organisational policy makers).

Phase Four-Evaluation -

Control

What: Strategic administrators need to align BTPM evaluation process with the traveller's regular practice.

Who: Strategic administrator/HR are responsible for this stage.

When: While evaluating BTPM design the strategic administrator/ HR needs to locate the new policies in line with the organisational culture.

Why: If BTPM evaluation does not align with the organisational culture then it is difficult to establish and travellers also cannot adopt the system

How: Strategic administrators need to observe the travellers behaviour and identify what is suitable for the travellers. Also travellers need to follow the system as demonstrated by the strategic administrators. Often the traveller may have to participate on organisational survey on the business travel processes to give travellers opinion. Strategic administrators (HR) usually arrange these surveys for the organisation.

Figure 9.71 Process Evaluation Control (Evaluate performance in line with external policy requirements).

Phase Four-Evaluation -

Control

What: Strategic administrators need to align BTPM evaluation process with the traveller's regular practice.

Who: Strategic administrator /HR are responsible for this stage.

When: while evaluating BTPM design the strategic administrator/ HR needs to locate the new policies in line with the organisational culture.

Why: If BTPM evaluation does not align with the organisational culture then it is difficult to establish and travellers also cannot adopt the system

How: Strategic administrators need to observe the travellers behaviour and identify what is suitable for the travellers. Also travellers need to follow the system as demonstrated by the strategic administrators. Often the traveller may have to participate on organisational survey on the business travel processes to give travellers opinion. Strategic administrator (HR) usually arranges these surveys for the organisation.

Figure 9.72 Process Evaluation Control (Evaluate performance in line with organisational culture).

Phase Four-Evaluation - Control

Figure 9.73 Process Evaluation Control (Evaluate performance in line with organisational procedures, rules and regulations).

Phase Four-Evaluation -

Control
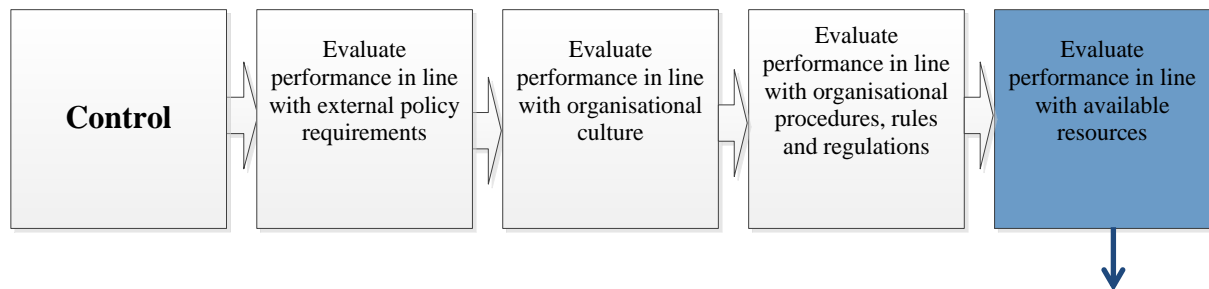
What: Strategic administrators can set the business travel budget according to the turnover and evaluate the process to make it as cost effective.

Who: Strategic administrators (finance) are responsible for this stage.

When: While evaluating BTPM design the strategic administrator finance needs to think that the system is aligned with the available resources

Why: Organisation needs to afford the system and cannot do anything beyond their capacity.

How: Strategic administrators (Finance) must aware of the budget all the time and inform the limit to the policy makers. Strategic administrator (finance) can also help the travellers to understand the organisation's resources by demonstrating them via meetings.

Figure 9.74 Process Evaluation Control (Evaluate performance in line with available resources).

Phase Four-Evaluation
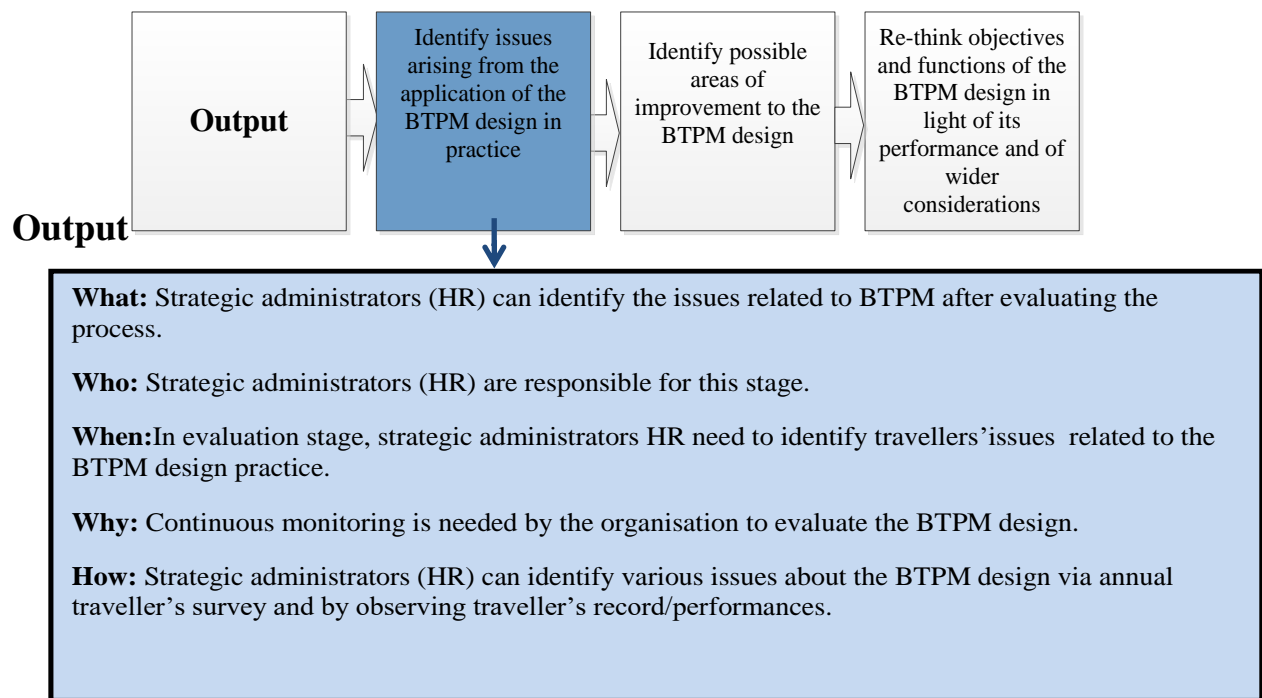
Figure 9.75 Process EvaluationOutput (Identify issues arising from the application of the BTPM design in practice).

Phase Four-Evaluation - Output

| Output | Identify issues arising from the application of the BTPMS in practice | Identify possible areas of improvement to the BTPMS | Re-think objectives and functions of the BTPMS in light of its performance and of wider considerations |
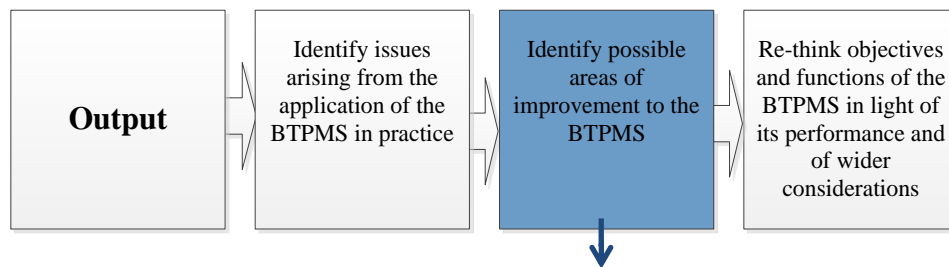
What: Strategic administrators (HR) need to identify the possible solutions in the evaluation stage.

Who: Strategic administrators HR are responsible for this stage.

When: While identifying issues related to BTPM design, strategic administrators can identify possible areas of improvement.

Why: Every issue related to business travel process needs to be solved as soon as possible.

How: Strategic administrators (HR) can identify possible areas of improvement by consulting with the policy makers and by research, studying on the process and improving it.

Figure 9.76 Process Evaluation Output(Identify possible areas of improvement to the BTPMS).

Phase Four-Evaluation -
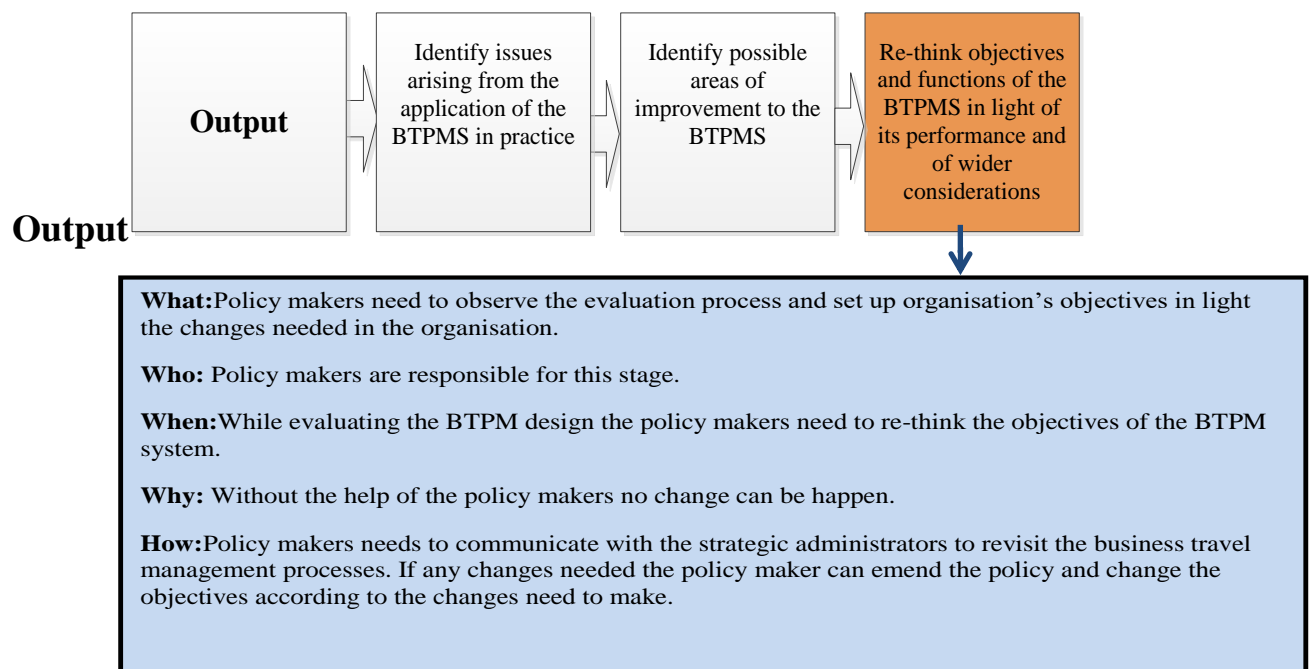
Figure 9.77 Process Evaluation Output(Re-think objectives and functions of the BTPMS in light of its performance and of wider considerations).

This framework is 'cyclical', recur in cyclic pattern like starts with agenda setting then process formulation, process implementation, evaluation then go back again in agenda setting phase . Therefore, just after the evaluation stage, the agenda setting stage continues the loop. Thus the system allows the improvement of the process to carry on without stopping. The proposed framework suggests less tactical administrative staff where the organisation can save cost. The organisation needs to set it up the online booking process that is linked with the TMC. This process also would be cost-effective for the organisations as there will be no need to use phone calls or filling in of any manual booking forms by the travellers. This conceptual (BTPM) framework can be applied to the organisations directly as a manual or guideline as suggested by the Chapter Ten framework evaluation. Also in future this conceptual (BTPM) framework can be developed as a software tool that can be used for business travel planning, management and performance. The Chapter Ten, Section 10.6 recommends how the business organisations can develop this framework as software in future.

9.5 SUMMARY

This chapter presented the business travel process management (BTPM) framework that was developed so that organisations can use it to manage their business travel. The literature review, scoping study, results of the organisational survey and the case studies, collectively establish the context for the BTPM framework development.

The BTPM framework was developed to provide a holistic approach for business travel process management, in order to achieve the aim of the research. To serve the main purpose of the BTPM framework, four areas were achieved through the following:

1) Four phases and gates (phase gates) were defined in the BTPM framework to ensure a sequential approach for defining, managing and reviewing the BTPM framework. In addition, a feedback loop was defined to enable the BTPM framework to act as a cycle for going through iteratively. This enables continuous improvement of business travel process management in an organisation;

2) Four phases of the BTPM framework guide the strategic level staff in an organisation to carry out consistent planning aligned with governmental policies, organisational culture, and organisational resources;

3) Four factors (Input, Mechanism, Control, Output) have been aligned with the phases (one to four) to ensure that organisations can manage their business travel processes in a structured way; and

4) Six people roles have been assigned to activities within the framework. These roles are policy makers, strategic administrators, line managers, travellers, TMCs and external consultants. This provides a basis for organisations to utilise their human resources effectively. It has been found from the survey and case study results each organisation has policy maker and strategic administrative, however if the travellers do not have a line manager they may have to report/discuss issues related to the business travel with the strategic administrator. Not all organisations have external consultants and a TMC. In that case the organisation can follow agenda setting, process formulation, evaluation phases if they need to. However the survey results shows, the large organisations usually use TMCs.

The next chapter will introduce the evaluation of the BTPM framework.

CHAPTER TEN

EVALUATION OF THE BUSINESS TRAVEL PROCESS MANAGEMENT FRAMEWORK

10.1 INTRODUCTION

This chapter discusses the evaluation of the developed framework of the research. The chapter begins with a discussion of the background to the evaluation, which includes the aim and objectives, the design of the evaluation questionnaire, and the evaluation procedures. The findings from the evaluation and some practical suggestions from the evaluators are then discussed. The chapter concludes with a chapter summary.

10.2 EVALUATION AIM AND OBJECTIVES

The conceptual business travel process management (BTPM) framework is designed to identify improved business travel processes for organisations. This evaluation aimed to test and address the adaptability and reliability of the developed framework from different perspectives more specifically it sought to:

- Assess the content, effectiveness, capability and usability of the framework;
- Demonstrate the framework has achieved the aim of the research;
- Recognise the weaknesses and strengths of the framework; and
- Obtain comments and recommendations to guide future development.

10.3 RATIONALE FOR SELECTING EVALUATORS

The business travel process management framework was designed for the strategic level management (policy makers, strategic administrators) to help them design a suitable organisational business travel management process. Therefore, the evaluation primarily aimed to gather comments and recommendations from organisational practitioners who are tasked with managing and designing business travel processes for their organisation. Also, two academic experts on process modelling have been interviewed, who are at the same time experienced business travellers. So the framework has been evaluated from the traveller, employer and BPM model expert's perspectives.

All together seven evaluators were interviewed. Three evaluations were undertaken by the organisation practitioners who took part in the case studies described in Chapter Six, Seven, and Eight which aided in the development of the framework. The involvement of the same personnel sought to test the internal validity of the research (Burns, 2000; Creswell, 2003). Through involvement of the same personnel the results and interpretations are taken back to the participants in order to be confirmed and validated. Therefore, the results and interpretations of interviews might be handed over to the interviewees in order to confirm the content of what they have stated during the interview encounter. In this way the plausibility and truthfulness of the information can be recognised and supported (Burns, 2000; Merriam 1998).

The other four evaluators were new to this study and offered new perspectives. The purpose "*is to arrive at evaluation conclusions as a result of a consensus among persons from different perspectives in relation to the program*" (Lynch, 1996, p. 62). Looking the research project from the different perspective helps to avoid bias in the evaluation. This removal of bias can create an external validity for this research (Wellington, 2000). External validity is concerned with the applicability of the findings in other settings or with other subjects, as Burns (2000, p. 160) notes "*how generalisable to the other contexts or subjects is our research.*" In fact, it might depend on the underlying similarities between the research context and other contexts. Nunan (1999, p. 17) puts emphasis on the research design and states that "*is the research design such that we can generalize beyond the subjects under investigation to a wider population*?" In this research, besides the participants of case study and survey the results/framework is also presented to the outside organisations that did not participate (interviewee from a finance sector and energy sector) in the case studies and survey. The view from other organisational expert helps to identify any bias and the results suggests for this research that all experts that are interviewed thinks that the developed framework is usable by their organisations and has developed in a structured manner.

All interviews are experts in their field. Five interviewees are strategic level employers who develop the business travel policy documents for their organisations. Two interviewees are experts in the process modelling.

Table 10.1 displays the details of those who participated in the framework evaluation process.

Table 10.1 Background Information of Evaluators

Evaluator	Organisational Discipline	Role of the Interviewee	Expertise of the Evaluator
Evaluator 1	Educational organisation (case study organisation one)	Procurement coordinator	Deals with contracting with travel management companies and online booking tools
Evaluator 2	Manufacturing organisation (case study organisation two)	Business improvement leader	Business development, policy making
Evaluator 3	Educational organisation (not participated in survey and case studies)	Professor	Business process modelling
Evaluator 4	Financial organisation (not participated in survey and case studies)	Strategy Manager	Business development, policy making
Evaluator 5	Electricity, gas and water supply (not participated in survey and case studies)	Proposals Manager	Business development, policy making
Evaluator 6	Educational organisation ((not participated in survey and case studies)	Professor	Process modelling
Evaluator 7	Financial organisation (case study organisation three)	Director	Policy making

10.4 SEMI-STRUCTURED INTERVIEW QUESTIONNAIRE DESIGN

This framework intended to address the developed business travel processes in organisations. The evaluation questionnaire (see Appendix Five) aimed to examine the appropriateness and effectiveness of the business travel process management framework by semi structured interviews. Flick (2006, p.160) mentioned that the purpose of interview "*is to reveal existing knowledge in a way that can be expressed in the form of answers and so become accessible to interpretation*". The design of this evaluation questions ensured the validity and reliability of the study. Turner (2003) mentioned interview method allow good interpretative validity, moderately high measurement validity for well-constructed and well tested interview protocols, good for measuring attitudes and most other content of interest, and interview method can provide in-depth information.

Interview questions were designed to ensure that the framework is "*valid, reliable and unambiguous*" (Richards and Schmidt, 2002, p.438). In this evaluation, the appropriateness of the framework has been considered as an important criterion (Sharp *et al.* 1993). Effectiveness is another important criterion in checking an intervention (Kumar, 2011). Thus, the evaluation interview questions review the content of the framework, clarity of the

framework and the application of the framework. The interview questionnaire was consisted of: a) background personal information; b) a structured questions; and c) open-ended questions to the targeted respondents

Background Personal Information: Seven experts were contacted to undertake the evaluation procedures. Among these seven, five interviewees are organisational practitioners and another two are academics who have expertise in process modelling. This section was intended to gather background information, such as the evaluator's position in their organisation, their level of experience, and business address. This allowed the different categories of evaluators to be classified (see Table 10.1). The findings of these evaluations were then analysed and presented in Section 10.6.

a) **Structured Questions:** The questionnaire aimed to gather responses from the evaluators on their assessment of attitude questions and assertions. Altogether, the main part of the questionnaire included 24 questions organised into four Sections (see Appendix Four for Evaluation Questionnaire). The evaluator had to respond according to the Likert scale from 1 to 5, where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree and 5=Strongly Agree.

- *Section 1- Review the Content of the conceptual (BTPM) framework and Elements within It:* This section reviewed the appropriateness of the framework at the strategic level. Five questions were defined to address the five high level evaluation concepts: instructions, phases, activities, roles/responsibilities and tools.

- *Section 2- Review the Clarity of the conceptual (BTPM) framework:* This section reviewed the effectiveness of the framework in terms of clarity. Five questions were identified to address the clarity investigation aspects: solutions, phases, activities, roles/responsibilities and tools.

- *Section 3- Review the Application of the conceptual (BTPM) framework:* This section reviewed the effectiveness of the framework in the area of application or use in the organisations. Six questions were designed to inspect the Framework against a range of applicability criteria: easy to understand, user-friendly, usefulness, benefit and ideal process.

- *Section 4- Review the Four Phases of the conceptual (BTPM) framework:* This section reviews the appropriateness of the framework in detail. This section

was focused on examining the priority of the main activities included in each phase. Five questions were included to carry out this further investigation.

b) **Open-ended Questions:** This section contained three open-ended interview questions. The objective of this section was to obtain comments and recommendations as a guide for the future developments of the framework. The questions sought information on:

- Possible impact of the Framework to the user;
- Barriers and challenges identified to adapt the framework to an evaluator's organisation; and
- Suggestions for improvement to the framework.

10.5 EVALUATION PROCEDURES

The evaluations were conducted on a one-on-one basis. The evaluation consisted of three parts. The first part was a presentation on the development of business travel process management framework. The presentation explained the context and the rationale of developing the framework, the structure and functionality of the framework in order to give the evaluators an understanding of the framework, its design and its context. The second part invited the evaluators to complete the evaluation questionnaire. The questionnaire asked the evaluators to state their opinion about the framework as described in Section 10.4. The third part concerned discussions with the evaluators about their answers and comments about the evaluation questions. The main purpose of this part was to clarify the evaluator's opinion on the Framework.

10.6 KEY FINDINGS AND ANALYSIS OF THE FRAMEWORK EVALUATION

This section discusses the key findings and the results of the Framework evaluation. Table 10.2 gives an overview of the ratings for each question within the four sections of the questionnaire. This table presents the ratings on a scale of 1 to 5 where, Strongly Disagree =1 and Strongly Agree= 5. On average, the framework scored 4.2 out of 5.0 in the evaluation. The average ratings of various sections are presented in the Table. An explanation of the results is included in Sections 10.6.1- 10.6.7.

Table 10.2 Ratings of the Framework.

Sections	Average Rating
Section 1: Reviewing the Content of the BTPM Framework and Elements with it	**(1=Strongly disagree, 2=disagree, 3= neutral, 4=agree and 5=Strongly Agree)**
Presents an appropriate set of instructions for developing a business travel management process in an organisation.	4.3
Identifies the appropriate provision of phases needed.	4.4
Defines the activities at appropriate levels.	4.4
Specifies the appropriate roles and responsibilities for each activity.	4.4
Specifies the appropriate tools relating to each activity.	3.9
Average Rating for Section 1	**4.3**
Section 2: Reviewing the Clarity of the BTPM Framework	**(1=Strongly disagree, 2=disagree, 3= neutral, 4=agree and 5=Strongly Agree)**
Clearly sets out the business travel process management solution.	4.6
Clearly addresses the business travel process management related steps in each phase.	4.7
Clearly defines the activities.	4.7
Clearly describes the appropriate roles and responsibilities for each activity	4.4
Clearly describes the appropriate tools relating to each activity.	3.9
Average Rating for Section 2	**4.5**
Section 3: Reviewing the Application of the BTPM Framework	**(1=Strongly disagree, 2=disagree, 3= neutral, 4=agree and 5=Strongly Agree)**
The BTPM Framework is easy to read	4.0
The BTPM Framework is easy to use	4.1

The BTPM Framework is relevant to the current management process in your organisation	3.3
The BTPM Framework could be easily applied to your organisation.	3.6
The BTPM Framework will significantly benefit your organisation.	3.6
The BTPM Framework leads to the ideal business travel management process	4.6
Average rating for Section 3	**3.9**
Section 4: Reviewing the Four Phases of the BTPM Framework	**(1=Strongly disagree, 2=disagree, 3= neutral, 4=agree and 5=Strongly Agree)**
Identify business travel related issues and, therefore aid with improved management of the business travel process.	4.6
Identify and analyse the organisational input requirements managing business travel.	4.4
Identify and analyse the organisational controls to manage business travel.	4.3
Identify and analyse the organisational outcomes to manage business travel.	4.3
Review the overall effectiveness of the BTPM framework in an organisation.	4.6
Average Rating for Section 4	**4.4**
Total Average Rating for all Sections	**4.3**

10.6.1 Results of Section 1: Reviewing the Content of the Conceptual (BTPM) Framework and Elements with it

The Evaluators rated the framework as highly appropriate in general. A high average rating of 4.3 was given to the five questions (Table 10.2, Section 1). According to Evaluator 1, '*every step in the Framework is very clearly identified and explained in a logical order*'. In addition the Evaluator 4, a strategic manager of a large financial organisation in UK commented that, '*the framework lends itself as an operating model for large organisations*'.

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Moreover, the Evaluators were highly satisfied with the provision of phases, activities and roles and responsibilities. They gave ratings of 4.4, 4.4, 4.4 for these questions respectively (Table 10.2, Section 1).

Two Evaluators (Evaluators 2 and 5) from two organisations who are responsible for business development and policy making within their organisations, suggested improvements to the existing framework, in particular the inclusion of specific tools such as; those for carbon calculations and cost analysis. This comment was deemed valid as the experts are involved with business development and policy making. Therefore, reference to such tools has been made in the framework which is included in Chapter Ten.

10.6.2 Section 2: Reviewing the Clarity of the BTPM Framework

The evaluators rated the framework high in terms of clarity. An average rating of 4.5 was given to the five elements (Table 10.2, Section 2). The Evaluators highly agreed with the statement that the framework has defined a solution for business travel process management. The score given for this statement was 4.6.

The evaluators were asked if the developed conceptual (BTPM) framework successfully met the following project objectives (previously discussed in Chapter Nine, Section 9.2.3):

1) To provide a sequential approach for developing business travel management policy;
2) To provide guidance for the travel managers to carry out consistent planning and review the process;
3) To support communication between all levels of the staff who are related with the process;
4) To specify the roles and responsibilities in relation to defined activities; and
5) To identify the pros and cons of the business travel processes or the area where improvements are required and review the effectiveness of organisation's business travel management process.

The evaluators confirmed that the framework has clearly addressed all the listed objectives/steps in each phase. An average rating of 4.7 was given to the relevant statement (Table 10.2, Section 2).

Evaluator 2 mentioned, '*tools, roles and responsibility could be more explicit*'. Evaluator 1 added, '*with regards to tools, we would like a carbon footprint calculator as part of our online booking tools, also a management information reports, i.e. to show flights/travel taken*

in a particular period, as we need to report on this for insurance purpose'. Therefore, tools have been described in detail on the framework (Chapter Eight). In terms of roles and responsibilities, the framework has been developed in a way that allows flexibility to various stakeholders, so it can be adapted to suit their individual needs. The roles and responsibilities are explained in detail in the framework.

10.6.3 Section 3: Reviewing the Application of the Conceptual (BTPM) Framework This section reviewed the applicability of the framework. The investigation includes determination of the understanding of the framework, whether it is user-friendly, useful, of benefit to the organisations and is an ideal process.

The findings of the evaluation showed that the framework was easy to read and understand. The findings also revealed that the framework was easy to use. Ratings of 4.0 were given for easy to read and 4.1 were given for easy to use (Table 10.2, Section 3). The findings of the evaluation suggested that the framework was relevant to the current practices within their organisations and a rating of 3.3 was given to the relevant statements (Table 10.2, Section 3). In addition evaluator 1, 2 and 5, 7 suggested that the framework will significantly benefit their organisations. To mention the benefit, the evaluator 5 mentioned, '*the framework provides a possibility to save time and cost when making travel arrangements*'.

Five evaluators mentioned that this framework is ideal and suited to their needs. An average rate of 4.6 was attained. The evaluators suggested this framework is able to identify the roles, responsibilities and activities during each stage of the business travel process (Evaluator 1, 3, 4, 5, 6 and 7). One evaluator (evaluator 2) however mentioned, '*this framework has advantages but no such Framework is ideal as processes can always be improved'*.

Evaluator 6 commented on the structure and foundation of the framework, '*it seems a comprehensive framework as it considers all the relevant elements of business travel"*. Additionally evaluator 1 mentioned that this framework will benefit their organisation as it provides a cost effective solution that all users would benefit from. Evaluator 1 also mentioned that this framework could be relatively easily applied, however organisations may not have a team or people who take ownership of 'travel management' so the planning agenda setting phase may take a long time.

10.6.4 Section 4: Reviewing the Four Phases of the Conceptual (BTPM) Framework This section studies the appropriateness of the framework in detail. The investigation focuses

on determining the importance of four phases in the framework. The findings of the evaluation indicate that the framework could identify business travel related issues and therefore aid with improved management of the business travel process. Rating for this statement is 4.6 (Table 10.2, Section 4). According to the evaluator 2, (business improvement manager of a leading manufacturing organisation in UK), *'the framework is well presented, using the input, output, mechanism and control.'* On the other hand evaluator 3 (an expert of business process modelling) stated, '*it is a good check list to ensure travel related processes are undertaken in the most efficient way'*. The average rating for the total section is 4.4 (Table 10.2, Section 4).

10.6.5 Positive Impacts of the Framework

All evaluators mentioned this framework has some positive impacts. In summary, the evaluators reported that the Framework could benefit organisations in the following areas:

- It offers a holistic view of the organisation's travel requirements;
- It will help in defining a solution to either develop new processes or optimise existing business travel procedures;
- Will be cost and time effective;
- Convenient and reliable; and
- Will provide consistent and centralised processes and rationalisation of measures.

All evaluators commented on the positive impact the involvement of various stakeholders (policy makers, strategic administrators) would have on the management of business travel practices. They particularly commented that this framework would create a better user experience. According to evaluator 5, "*guidance on tools which could be used during the control activity would be useful*". According to evaluator 4, "*this framework will be beneficial for the organisation because it would provide a cost effective solution that 'all' user would benefit from. All users would be involved in planning-increased stakeholder buy-in*."

10.6.6 Challenges of Framework Implementation

In establishing challenges for users in the implementation of the framework, the evaluators were invited to suggest and specify their views and opinions on the barriers. The result suggested that, in terms of changing business travel management, the first step towards

implementation of the change would be to secure buy-in from the senior managers (evaluator 5).

One suggestion for the framework was to include guidelines on the time taken. Although important, however time is a subjective matter and to include a time guideline in the framework can render the framework ineffective given that each organisation will have various levels of development when it comes to business travel management practices. Some organisation may adopt the framework very quick, and others may take longer.

Three evaluators mentioned (evaluators 1, 4 and 6) about ensuring that there is executive sponsorship at board level, and that this is a challenge.

The major limitation of the framework is that it has not been applied in an organisation yet to verify the framework, as it will take time and engaging an organisation effectively. However future work could be done in this area and this framework could be used as a starting point.

10.6.7 Suggestions for Improvement

According to evaluator 4, (strategic manager of a large financial organisation), *'keeping the framework simple and high level will ensure it remains relevant across various organisations'*. Evaluator 4 also suggested that the framework may compare against various 'Change Models' to draw comparisons and help define 'best in class' practices and validate the existing framework. Evaluator 1 also mentioned to considering change management to see how the organisation could react to the framework implementation. According to Kotter, J. (July 12, 2011). Successful change management is more likely to occur if the following are included

- Benefits management and realisation to define measurable stakeholder aims, create a business case for their achievement (which should be continuously updated), and monitor assumptions, risks, dependencies, costs, return on investment, dis-benefits and cultural issues affecting the progress of the associated work;
- Effective communication that informs various stakeholders of the reasons for the change, the benefits of successful implementation as well as the details of the change (when? where? who is involved? how much will it cost?);
- Devise an effective education, training and/or skills upgrading scheme for the organisation;

- Counter resistance from the employees of companies and align them to overall strategic direction of the organisation; and

- Provide personal counselling (if required) to alleviate any change-related fears

- Monitoring of the implementation as required.

To compare the BTPM framework against various 'Change Models' to define 'best in class' practices and validate the existing framework however can be achieved after applying this framework in the organisations. When sufficient examples of application of this framework are aggregated over time that will help to identify the characteristics of 'best in class', so that future implementations can benchmark their performances against the best in class.

10.7 SUMMARY

This chapter presented the framework evaluation process and its findings. An evaluation questionnaire was used to gauge the appropriateness and effectiveness of the business travel process management framework from an organisational expert perspective. The findings from the evaluation indicated that the framework was appropriate, effective and useful in managing business travel processes in organisations. The findings from the evaluation helped the researcher to determine the strengths and weakness of the framework. The framework has the potential to benefit organisations in several ways including helping them to define a solution to either develop new processes or optimise existing procedures. It is also convenient and provides consistent and centralised processes and rationalisation of measures; and offers a holistic view of the organisation's travel requirements. The limitations in implementing the framework have been also highlighted and these include getting senior manager 'buy-in' to any proposed changes and ensuring executive sponsorship at board level. The next chapter presents the conclusions drawn from the current research.

CHAPTER ELEVEN

CONCLUSIONS AND RECOMMENDATIONS

11.1 INTRODUCTION

This chapter presents a summary of the research, reviews the aim and objectives and discusses how each of the objectives was achieved. It also makes recommendations to organisational policy makers and strategic administrators and to governments on how to manage the business travel process effectively and efficiently. The chapter then identifies potential areas for future research and discusses the limitations of the current research. The chapter ends with concluding remarks.

11.2 SUMMARY OF THE RESEARCH

This research investigated current business travel process management related issues, barriers, and benefits faced by UK organisations. This work culminated in a business travel management framework to manage business travel efficiently.

Several methodological techniques were used to achieve the research aim and objectives (see Chapter Three for more detail on this). Firstly, business travel management experts from companies, consultancies and academia were interviewed in a scoping study exercise, and the results analysed. Second, a survey of 41 travel managers/directors was carried out, and the results examined. Third, in-depth case studies of the business management processes applied relating to business travel were conducted in: a large educational organisation; a large multinational manufacturing organisation; and in a medium-sized service organisation. Fourth, the case study data was then used to inform the development of a generic Business Process Mapping Framework to help enable organisations to manage business travel more effectively and efficiently. Fifth, the framework was then evaluated by experts. The findings from the evaluation indicated that the framework was appropriate, effective and useful in managing business travel processes within the organisations tested. Several organisations that evaluated the framework noted that their organisation do not have the business travel process in organised manner as this framework proposed and surely this framework could be applied in their organisations to improve the system. The four phases of the framework can help an organisation to manage business travel in highest form of organised manner and thus it can be cost effective. This is essential as reinforced by Dudley *et al.,* (2011) who stated that cost is a

major issue that influences the level of business travel. This is reaffirmed by Aguilera (2008), who stated *"business travel is sometimes regarded as a forum for the implementation of cost-cutting strategies."* The findings from the evaluation helped the researcher to determine the strengths and weakness of the framework. The strengths of the framework include having the potential to benefit organisations in several ways. This consists of helping the organisation to define a solution to either develop new processes or optimise existing procedures. This framework allows the organisation to manage communication from strategic level to implementation level effectively. Aguilera (2008, p.1110) noted, *"development of multi-units companies, a flattening of hierarchical structure and increased employee independence have led to an increased need for internal communication".* This framework is also convenient, provides consistent and centralised processes, rationalisation of measures, and offers a holistic view of the organisation's travel requirements.

According to Lyons (2013, p.50), transport policy and business travel practices face "*challenges to addressing a radically changed economic landscape, pressing environmental issues, and managing the demand for travel. They also face the opportunity of the information age in terms of new ways of transacting that may hold the promise of reducing or reshaping the amount of business travel that takes place*". The holistic approach of this framework could help the organisation to control and improve the business travel by reviewing it from changed economic landscape, environmental aspect, and how to managing the demand for travel. There is also opportunity in this framework to improve and replace the business travel as much possible by the virtual travel.

11.3 ACHIEVEMENT OF RESEARCH AIM AND OBJECTIVES

The aim of the research was *to investigate the process implications of business travel within organisations with a view to improving travel practices.* To achieve the research aim, the following five objectives were introduced in Chapter One, Section 1.4.

1. To review the business travel sector and identify the issues, processes and impacts within it;

2. To examine the effect of organisational process on business travel;

3. To develop a framework to improve the efficiency and effectiveness of organisational business travel processes within organisations;

4. To evaluate the effectiveness of the proposed framework in delivering business travel; and

5. Derive recommendations for practice and policy.

The following sub-sections discuss these objectives and summarise how each objective was fulfilled.

11.3.1 Objective One: to Review the Business Travel Sector and Identify the Issues, Processes and Impacts within it

The first objective was, "*to review the business travel sector and identify the issues, processes and impacts within it*". This objective was achieved using a review of literature on the subject of business travel process management (Chapter Two) and by in-depth semi-structured interviews in the form of a scoping study with experts on business travel (Chapter Four).

The literature review and scoping study highlighted that there is a relative scarcity of academic literature within the business travel process management field (Aguilera, 2008; Faulconbridge, 2009; Dudley, 2010). The literature review outcomes also revealed that the current issues to business travel process management mostly related to the high costs, wasted time, strong policy making, inefficiency of travel choices, the need for a structured process which is not yet in place, higher level management care and simplifying the process for the various stakeholders. The difficulty of business travel is that while calculating the total business travel expenses, the organisations give priority to the business mileage, travel by train, taxi fares, international travel by air and hotel costs; yet the business travel cost related social health and environment are largely not accounted for (Roby, 2014) (Chapter One, Section 1.3). The literature review results found there are three types of impacts of business travel (Chapter Two, Section 2.4.1) these are: 1) organisational impacts, 2) personal impacts, and 3) social impacts. These impacts could be negative (drawbacks) or positive (benefits). The organisational negative impacts are unplanned travel that makes the organisation to loose cost, excess time; use of IT (i.e. the use of information technology can reduce the need of face-to-face travel); the purpose of business travel may change depending on the sector, and firm culture. The personal negative impacts are poor work- life balance, the lack of personal security whilst away; and finally the social negative impacts are the high quantity of environmental disruption caused by business travel. A positive impact noted by Beaverstock and Budd, 2013 (p.1) is that business travel improves global productivity. According to Faulconbridge et al.

(2009), trust building via business travel can minimise the future need of travel. Business travel also enhances personal career paths and brings much job satisfaction and variety to the working week (Welch et al., 2005).

The literature also revealed that the future of business travel (Chapter Two, Section 2.5) will change with the socio-economic conditions of the country. If the economy develops in future that will result in incremental employment around the world and therefore the amount of business travel will increase.

Overall, from the findings of the literature review and the scoping study, four research gaps were identified (Chapter One, Section 1.5) as follows:
1) Lack of qualitative research relating to business travel process management;
2) Lack of sector specific research on current business travel processes;
3) Lack of empirical research among different organisations; and
4) Lack of a structural/ strategic framework on business travel process management.

A series of research questions which emerged (Chapter One, Section 1.5) were formulated to guide the accomplishment and achievement of the other four objectives.

11.3.2 Objective Two: to Examine the Effect of Organisational Process on Business Travel

The second objective was to "*to examine the effect of organisational process on business travel*." The investigation of this objective was accomplished by an organisational survey (Chapter Five) and three case studies (Chapters Six, Seven and Eight).

While undertaking the survey and case studies the travel policy documents of the organisations were analysed for the purpose of this project. All the policies referred to the responsibilities of business unit management, travel arrangements, travel security, safety and export compliance, transportation, accommodation, payment methods, business expenses.

The survey findings revealed that organisations tended to use either online self-booking services alone, or on-line booking services together with the use of TMCs. Only a few organisations fully depended upon TMCs to choose transport mode and hotel and then book them. In-depth research from the case studies revealed that using a TMC is helpful for 24 hour service, returns in the event of cancellation and for receiving discounted rates for tickets. However, seemingly the ideal business travel booking process that members of organisations want to use is an online booking system where travellers can book travel directly from the

suppliers (airlines, hotel, rail, car rental). This system is currently not easy as the security, terms and conditions of refund in the event of cancellation from the suppliers are not strong enough to rely on and the TMC is there to manage this for organisations.

Survey findings revealed that different types of department in an organisation - mainly human resource (HR), finance and often sales and marketing are related to managing business travel. Case study results identified less use of tactical administrators make it quicker to book travel. Often the shortage of staff is a problem for systems where tactical administrators are involved in booking travel (Chapter Six). The conceptual (BTPM) framework thus suggests managing business travel by the following job roles: policy maker, strategic administrator (finance, sales and marketing, HR, IT). Here the policy maker, and strategic administrators in HR and finance are more likely to develop policies at the strategic level while sales and marketing, and IT staff are more closely related to the implementation level. The framework also eliminates the tactical administrator role from the business travel management process to keep the booking process quicker, simple, and cost effective. Less use of staff can thus save costs for the organisation.

The survey and case studies showed that the most common objectives for a business travel policy tend to relate to improving efficiency and reducing cost. The key factors influencing business travel were found to be trip-related factors (e.g. cost of travel, cost of accommodation, traveller security) and organisational and employee factors (e.g. organisational size, geographical separation of units) (Chapter Five).

Measuring the carbon footprint of an organisation is seen as being a challenge especially when a self-booking process is used (Chapter Six). Organisations prioritise saving cost of travel rather than reducing their carbon foot-print. Stronger rules from government to control organisation's carbon footprint can help the organisation as in this case the organisation has to respond to government imposed regulations.

In terms of the future of business travel, the research suggests that business travel will likely see reducing the cost of business travel to be given more priority, followed by a need for improved decision tools and a desire for less bureaucratic/more flexible process management systems. There is a need to improve communication between the strategic level and travellers (Chapter Six). There is also a need for behavioural change among the employees (Chapters Six, Seven). However, it has been found that complying with the rules set by a travel policy is

not always possible for travellers, e.g. while travelling in a remote area, and so flexibility is sometimes useful (Chapter Six).

The analysis of the survey and case studies accomplished that organisations are facing several problems when managing business travel. In the cases examined there appears to be no structured process that is followed. Organisations are instead focusing directly on cutting the costs of booking travel and improving efficiency. No evidence was found that suggests that organisations were adopting a holistic approach to manage and control the "total" business travel management process. In the case study chapters therefore, three sets of IDEF0 business process models were developed to provide a graphical representation of the business travel management process. These models later helped in developing a conceptual business travel process management (BTPM) framework as this framework follows the input, control, outcome, mechanism of the IDEF0 rules which forms the basis to develop into a business travel management software tool to be used by organisations to manage their travel processes in their entirety.

From the survey and three case studies the effects of organisational process on business travel reveal that there is a need for organisations to improve their processes to make them more sustainable and cost effective. In particular, business travel in small and medium organisations is often unplanned (and thus often sub-optimal from the perspective of the organisation). Meanwhile large organisations also face barriers on managing the business travel process that need to improve like cutting cost of TMCs, excess admin staffs, cancelled travel booking; improving efficiency of the travel management system..

11.3.3 Objective Three: to Develop a Framework to Improve the Efficiency and Effectiveness of Organisational Business Travel Processes within Organisations

The third objective was "*to develop a framework to improve the efficiency and effectiveness of organisational business travel processes within organisations"*. Accordingly the business travel process management framework was developed for organisations to allow them to plan, review and manage the business travel process. The framework includes four phases: agenda setting, process formulation, process implementation and evaluation. By working through the four phases, organisation's practitioners can develop more effective business travel process management practices. The framework also specifies the roles and responsibilities of internal and external stakeholders involved with business travel processes in organisations. Through investigating each activity in phases by input, mechanisms,

controls and outcomes, organisations can utilise their available resources properly and plan and manage the total business travel process in a more effective way (Chapter Nine).

The framework is designed in a sequential way to ensure that it can define issues, devise potential options, select and implement appropriate solutions and review outcomes related to business travel in a systematic way. The framework also helps guide the strategic level staff in an organisation to carry out consistent planning aligned with governmental policies, organisational culture, and organisational resources.

11.3.4 Objective Four: to Evaluate the Effectiveness of the Proposed Framework in Delivering Business Travel

The fourth objective was to "*to evaluate the effectiveness of the proposed framework in delivering business travel*". This evaluation was presented in Chapter Ten. Additionally, the framework was refined by combining the recommendations of evaluators. In summary, the evaluation showed that only minor adjustments needed to be made to the framework following the comments received from the evaluators, together with the justifications from the literature review and interviews. Consequently, as per the suggestions of the evaluators (Chapter Ten, Section 10.6.7) it has been recommended for the organisation to compare this framework with an organisational change management model after its application (Kotter, 2011).

The limitations of the research are detailed, and the conclusions and recommendations for future work are presented in later sections.

11.3.5 Objective Five: to Derive Recommendations for Practice and Policy

The fifth objective was "*to derive recommendations for practice and policy*". The current research has defined a holistic approach and presented a business travel process management framework that organisations can use to improve their business travel process management practices. The investigation and the evaluation of the framework suggested several possible roots for future development of business travel process management for the organisations, and for further research work to build upon the current study. Overall, this research provides recommendations for future work in three main areas:

1) Recommendations regarding business travel process management for business organisations;
2) Recommendations for governments; and
3) Recommendations for future research.

11.4 RECOMMENDATIONS REGARDING BUSINESS TRAVEL PROCESS MANAGEMENT FOR BUSINESS ORGANISATIONS

Strategic level management should consider identifying the issues preventing the process from reaching its optimal state. Therefore, organisations needs to identify issues before implementing /modifying the travel policy (It was found through the evaluation that the Case Study One organisation does not have the agenda setting phase in practice. Also according to Evaluator 4, "*we should have followed a sticker planning implementation phase to have taken into account all of the stakeholder views*". Here the evaluator suggested that organisations need to engage in a constructive planning process before it goes to the implementation level. This means that if any other organisation does not have an agenda setting phase, then it needs to consider identifying issues from the related stakeholders. After identifying the issues, the strategic level management should consider spending time to identify all the available solutions and select the best one for them. Without knowing all the solutions an organisation cannot select the best, i.e. which booking tool is best for the organisation.

Policy makers and strategic administrators should consider maintaining frequent communication between themselves and travellers via regular meetings and conferences. This is crucial because a good communication between the strategic and implementation levels can secure the management changes into place. For example, after developing the new policy the strategic level management needs to explain the new process to the travellers properly so that they can follow good practice. For example, it was found in the Case Study One example that the TMC charges money from the traveller as a maintenance cost. Yet some travellers are not aware of the reason for this charge.

Strategic administrators (HR) need to communicate the findings of issues from the travellers (after observation, regular meetings) to senior management (policy makers) in a manner that would encourage them to act on the information. Strategic administrators (HR) also need to communicate the findings to staff members who would be affected in a way that will enable them to see how they and the organisation would benefit as a result.

Strategic level management should also establish the operational context in which the business travel process functions. How much business travel is undertaken, when, by whom, for what purposes, by what mode, and at what cost? What is the function of business travel in contributing to the overall objectives of the organisation? Answers to these questions will help the strategic level management to design the business travel management process. The

strategic management need to take care to consider how the design of business travel management process would fit within the organisational structure, and the services and tools that would be required.

On the process formulation stage the strategic level management need to construct a business case detailing how and why it would be an improvement on the existing process for each of the key stakeholder groups and for the organisation as a whole. This will help the organisation to develop possible business travel processes and policies that need to be implemented.

Policy makers need to devise an implementation plan and introduce the process incrementally through a pilot in a single business unit or all in one go (depending on the organisational structure and availability of resources). A smarter plan can manage the travel in the best possible way and at the same time save money. As for example, after developing a plan if it can be tested before implementation, the drawbacks of the plan can be identified and organisation can be rescued from difficulties.

Policy makers must involve strategic administrators to organise the training requirements and consider the appropriate and effective staff training and skill assessment programmes in order to build employee's confidence, efficiency and to create good culture in the organisation. Policy makers also need to set up a monitoring regime to determine how well the system is operating, and consider making any adjustments should they be necessary. Good observation of the travellers' behaviour, audits, and surveys are generally the best ways to undertake these monitoring and strategic administers need to assists with this to the policy makers. Policy makers should revise the business travel management process for evaluating their level of success in managing and implementing effective business travel processes and evaluate the extent to which the existing process is optimal against its operational objectives. To what degree are these internal to the process (and hence manageable) and external (unmanageable)?

11.5 RECOMMENDATIONS FOR GOVERNMENTS

The government might support organisations in shifting to a more effective and efficient business management process through improving the transport system. This can be possible by providing improvements to infrastructure, such as roads and highways and parking spaces; raising funds for travel demand management programmes; and giving aid to public transport

companies to improve their travel practices by applying modern technologies. The research revealed (Chapters Five, Six, Seven and Eight) how government might do this. The recommendations are described below.

In public organisations, the government can help develop and disseminate business-focused information on the 'real costs' of not 'properly' managing business travel and the benefits of doing so. If mandated by the government then the likelihood is that the users will give business travel management processes the attention they deserve. Government can therefore introduce regulations that compel organisations to 'better manage' their business travel processes.

In public organisations governments can help train and educate business travel managers to more effectively do their jobs through enhancing marketing and communication skills for example. Government can set up examples of good business travel practice of the organisations by monitoring and developing the public organisations. This can develop business organisations as well as travel practice in the whole country. Government can subsidise business travel management processes that were aligned with 'public policy priorities' either directly through financial or 'in-kind' support, and/or indirectly through the fiscal system.

Government can subsidise business travel management processes that were aligned with 'public policy priorities' either directly through financial or 'in-kind' support, and/or indirectly through the fiscal system. And for example government can improve public transport so that the organisations can get the sustainable travel mode for business travel. Sustainability generally has higher priority in public policies than in private; hence the government can provide aid to maintain it. In this respect government also can build capacity by providing links with broader service providers to perhaps persuade them to invest in transport and communication infrastructural and service improvements. A good infrastructural service can improve organisational travel practice quicker, more safely, and more cost effectively.

Finally, governments need to consider how broader policy decisions relating to tax for instance, might impact on business travel management procedures.

11.6 RECOMMENDATIONS FOR FUTURE WORK

Transport is an important component in a nation's development, and so a poorly planned transport system can cause major economic, social and environmental problems. This is the case for countries and so too for organisations. In particular, for several types of organisational travel in the course of work, i.e. business or corporate travel, this is generally the second or third largest controllable cost and can be a significant cost, so this obviously directly influences balance sheets. A lack of attention on this subject is reflected in the scarcity of research in the business travel area (Aguilera, 2008; Beaverstock *et al.*, 2010), whilst the studies that have been undertaken have predominantly been conducted by management consultants on a consultancy basis (Morrison *et al.*, 1994). In particular, there appears to be little understanding of how organisations typically go about organising business travel, or of the benefits and barriers related to organisational business travel (Gustafson, 2012). For instance Lyons (2013, p.50) illustrated that *"both transport policy and business practices face challenges of addressing a radically changed economic landscape, pressing environmental issues and managing the demand for travel"*. The purpose of this study is to investigate the process implications of business travel within organisations with a view to improving travel practices.

Specifically the purpose of this research is to analyse existing literature to understand the current and past situations in business travel, and also the definition, nature, role, significance, benefit and barriers of business travel. Findings from the literature review suggest that further investigation is needed to examine the impact of current business travel on the organisational process. This research identified the impact of current business travel process via expert interviews, survey and case studies and finally develops a solution to assist with the overall process. Finally, the key aspect of this research was to apply an information management system based approach to the field of business travel in order to develop a process model that monitors current practices to capture the 'as is' process and identify bottlenecks/barriers to change and the 'real' cost incurred. To better prepare for the future needs of business organisations it is necessary to plan and prepare today. The findings from the research showed that current organisations do not have an overarching method for business travel that can combine all the processes, interlink and conduct effective communication in between all the users. This research develops a framework that can give a complete methodology to manage and undertake business travel by the organisations.

Extend the Research to Develop Software for BTPM framework

Currently business organisations have software for booking travel, however no software has been developed for the management teams of business organisations to plan and develop business travel policy. The BTPM framework is designed in such a way that the organisation can develop a software tool that will help both business travel policy development and booking business travel. This software tool will be complementary to the framework, as the organisation can use the framework directly as a manual for planning and managing business travel. Business organisations can thus extend the research to develop software for the BTPM framework so that it will help the stakeholders to individually log into the system and can follow the management, control or booking steps they need to undertake.

Academic researchers meanwhile can replicate case studies to other organisations in different sectors e.g. oil and gas or in organisations in other countries to see the in-depth business travel processes of those sectors and countries. Also more research to explore business travel process management via quantitative methods using a much larger sample of organisations to examine the current practices and issues will be helpful for both academics as well as the business organisations to know the current situation of business travel management processes more broadly.

Business organisations can compare the conceptual (BTPM) framework with change management approaches after applying the framework in the organisations. As explained in Chapter Ten, Section 10.6.7, by comparing this framework against various 'Change Models' it is possible to draw comparisons and it helps to define 'best in class' practices and validate the existing framework.

11.7 LIMITATIONS OF THIS RESEARCH

Research in this area enriches the academic literature; the BTPM framework developed in this research has been appreciated by evaluators, and the proposed approach of Business Process Modelling in Transport Studies is new. However, this research has some limitations, as with any research. The limitations are identified as follows:

The organisation survey was conducted with small sample (41 organisations). Although the sectors that participated in the survey are appropriate representatives of business organisations in the UK, there were questions over the generalisation of the data to develop statistically-based conclusions by underlying scientific processes.

Three case study organisations were selected that have participated in the organisational survey and found to be good business travel practice organisations. Organisations from other sectors like construction, oil and gas have not been selected as case study organisations. Although the manufacturing, educational and finance sector case study organisations are appropriate representatives of business organisations to see in-depth business travel processes, there are perhaps questions over the generalisation of the data to a broader set of sectors in business.

Evaluation of the conceptual (BTPM) framework was carried out among three case study organisations, and organisations that were not included in the case studies, and also among some academic experts on process modelling. The reason for carrying out the evaluation on the case study organisations was to know in detail how the framework can be helpful for these organisations as in-depth research has been carried out. Individuals from other organisations who did not participate in the case studies were also selected because their view was helpful to know how much the framework will be useful in general. Also, two academics evaluated the framework from the structure of the framework perspective to check that if it has been developed correctly. However, it might have been very useful to include a broader representation including a greater variety of disciplines, e.g. public and private organisations.

11.8 CONTRIBUTIONS TO KNOWLEDGE

The prime purpose of this thesis is the development of conceptual business travel process management (BTPM) framework for organisations to guide their business travel management. The main contributions to knowledge of this research are detailed below:

- The research added further qualitative data to the existing literature in the business travel field by reviewing previous research and adding expert interviews, survey and case studies data and results.
- The research revealed sector specific current business travel practices, issues, impacts and future opportunities by analysing the data from an organisational survey. The survey also helped to outline the understanding of industry members in the domain of business travel process management and a sustainable business travel practice and its improvement (Chapter Five).
- The research investigated the actual practices of organisations in undertaking business travel management at both the strategic and implementation levels (see Chapter Three, Section 3.4.4, Figure 3.10 for the definitions of strategic and implementation levels).

The research revealed that at both levels it is necessary for organisations to associate their business travel process management systems with core business planning. However, it also found that many organisations, especially SMEs, do not have any written business travel policies. Furthermore, it also emphasised the need for organisations to collaborate well with business travellers and business travel process management teams to achieve better implementation of the business travel process management system (Chapters Six Seven and Eight). The results of the evaluation found that some organisations do not have the necessary collaboration needed to plan for better business travel practice.

- The research identified the issues that organisations must address in order to develop a complete and robust business travel process management system (Chapters Five, Six Seven and Eight). The key issues are cost effectiveness, improving efficiency, improving sustainability.

- The research developed a business travel process management framework to help organisation practitioners (e.g. policy makers and strategic administrators) to define, implement and review their business travel process management. It provided recommendations for organisation practitioners regarding how to use and benefit from the proposed business travel process management framework (Chapter Nine).

- The research evaluated the business travel process management framework for further development based on comments and recommendations from evaluators (Chapter Ten). This framework could compare with the change management if applied in organisations.

- Research 'to investigate the process implications of business travel within organisations with a view to improving travel practices' was fulfilled by scoping study, survey, case studies, framework development, evaluation and recommendations.

11.8 CONCLUDING REMARKS

Business travel in the world today constitutes an important part of human life. Proper planning of business travel is clearly required yet is often neglected by many business organisations. As a result, a major challenge is how to reduce these costs. There is, however, a risk that such actions may adversely impact on the overall performance of the implementing organisations if an appropriate method is not employed. In terms of a research gap, it appears from previous work that there is a lack of understanding of the benefits and barriers related to

organisational business travel and a lack of qualitative research on the impact of business travel on organisational processes. To further enhance the business travel planning capacity of an organisation it is necessary to study both qualitative and quantitative details of business travel. In a continuously changing technological environment it is even more necessary to analyse and update the possible solutions to businesses for planning their travel. There is also a need for the use of alternative ways to tackle the rising challenges of business travel. Information systems such as encouraging home working (with remote access to files and email), teleconferencing (saving time and money), improved public transport information (maps and route finder tools), planning of bus routes to and from the business (using GIS) and fleet management (telemetrics, fuel management) are all potential methods and tools that can help meet the ever increasing demand of business travel whilst limiting impacts on human lifestyles.

The geographical scope of business travel ranges from the local to the global, and therefore these scales need to be defined for appropriate consideration. Also the modes of business travel include car, coach, railway, sea/ferry and air. For each of these modes separate considerations have to be given to analyse and understand the need and usage of travel. Technological developments like teleconferencing and video conferencing are also sometimes being used as a substitute for business travel. However their integration into business travel planning should not exclude the consideration that personal meetings are important for business organisations and that not all meetings are able to be replaced by teleconferences.

Travel plans and travel policies can be important criteria for the development of business travel, although the application of travel policies and travel plans occurs less in the business travel sector than for commuting or freight travel. Business travel therefore supports the productivity of the world economy and sustainable growth by adding new business through various ways, such as meetings, conferences and trade fairs. Business tourism is also an important part of leisure travel and the economy.

The goals of business travel planning generally encompass maximising business efficiency and minimising the travelling hours of employees and the carbon emissions resulting from that travel. With these goals in mind, qualitative data has been collected and reviewed that can be used later to model an improved framework for business travel planning (with the help of function modelling: definition added in methodology chapter). The literature review results

suggest there are some barriers related to the political motivation, economic conditions, social acceptability and technological developments. The scope of this research is to investigate the process implications of business travel within organisations with a view to improving travel practices. Examining the existing literature identifies the nature, role, significance, benefits and barriers of business travel.

Organisations need to engage more strategically, for example by aligning their travel programme with key objectives. How the organisations can separate necessary trips from unnecessary ones, use tougher enforcement policies and constantly improve travel plans are the key focus of this study. This research will find out the most effective ways for improving business travel practices within business organisation.

This research investigates the process implications of business travel within organisations. It does so by exploring issues related to business travel in order to assess the extent to which organisations can manage their business travel effectively in the current economic climate. Specifically, the aim of the research is to investigate the process implications of business travel within organisations with a view to improving travel practices. This research reports the results of the literature review, fifteen expert interviews, an organisational survey of business travel practices in 41 UK organisations and three in-depth case studies. On the basis of these results, the research developed a business travel process management framework (BTPMF). The framework is a comprehensive manual of how to manage the business travel within an organisation. It is specifically designed to be of use to a number of the many of the stakeholders involved in the process, namely: policy makers, strategic administrators, line managers, travellers and the framework is also useful for external factors involved in the process, such as travel management companies. This research established the definition, as well as the characteristics, motivations, and issues related to business travel. The research also investigated the actual practices of business travel management at both the strategic and implementation levels. The research emphasised the need for organisations to collaborate well with business travellers and business travel process management teams to achieve better implementation outcomes.

This research introduces a complete BTPM framework for the business organisations to manage the process, not just from a theoretical perspective but also from a management (organisational culture) perspective. The BTPM framework considers the strategic implications of business travel process management and in the future it could end up as a software installation for developing policy, monitoring, managing and evaluating the business travel management process in organisations. This research is also important in recognising how business travel process management might work in terms of collaborating with internal and external stakeholders e.g. through the integration between the strategic and implementation level of the organisation and with external travel management companies.

In conclusion, the framework developed in this research provides a holistic approach to manage the business travel processes in organisations. The framework gives guidelines to the organisations to help them utilise their available resources, maximise the benefits of business travel activities and highlights processes for continuous improvement effectively. The framework provides the learning and feedback loop that enables lessons to be learnt from each phase. This research is a positive step for academics, business organisations and for the government in terms of the business travel research arena and management practice. Business organisations can enhance their business process management plan and practices with the use of the novel BTPM framework developed in this research.

In summary the main contributions of this research are as follows:

This research established the definition of business travel, as well as the issues, impacts related to business travel. It identified the definition of business travel as work related passenger travel, as opposed to goods travel. It also found that business travel must be undertaken by the employees of an organisation and not by outsiders. In the research it was found commuting and freight was included as business travel in only a few academic studies (Dudley, 2010, Dudley *et al.,* 2011). However this research revealed that current business organisations in the UK and major academic literatures do not include commuting and freight as business travel.

Sector-specific current business travel practices, issues, barriers and future opportunities were outlined and reviewed. The results from the surveyed organisations gave a sector-specific overview of the issues, barriers, future of the current business travel process in organisations. The case study chapters gave in-depth scenarios of the current business travel processes of the organisations in the education, manufacturing and finance sectors.

The research investigated the actual practices of organisational business travel management at the strategic and implementation levels. The research identified the stakeholders involved with business travel process management and which job roles (policy makers; strategic administrative: HR, finance, sales and marketing, IT) were important to manage business travel processes effectively. The research also identified that the business travel management process is cost and time effective if the traveller books their own travel and there is no tactical administrative role to whom the traveller needs to report for booking individual travel. The research also emphasised the need for strategic administrators to collaborate well with business travellers and business travel process management teams to achieve the better implementation of business travel process management.

Two types of issues were identified throughout this research that organisations must address in order to develop a complete and robust business travel process management system including:

- Issues of organisation related to high cost, lost time, unplanned policy, poor decision making, unsecure process of travel, excessive use of ICT, lack of sustainability/CSR
- Issues for the traveller related to health loss, unnecessary travel, work-life balance, specialisation and convergence, changing business travel management processes, lack of security, and status.

Finally, the research developed a novel conceptual framework for business travel process management to help organisational practitioners (e.g. policy makers, strategic administrators) to outline, implement and review their business travel process management, along with guidance to practitioners about using the framework and benefiting from it. The framework is innovative because it combined the concept of the IDEF0 and the travel policy phases by Fischer (2007) as its theoretical underpinning and this novel IDEF0 concept which examined the current organisational processes from the process management perspective whilst travel policy phases gave a view from policy developing rules. The organisational business travel processes have not been looked at through these perspectives in any previous research. This framework was designed with the IDEF0 process modelling concept so that the business organisation can apply the framework directly as a manual or else develop software to plan and manage business travel for the organisation. The empirical data collected in this research (survey, case studies, framework) identified that no structured framework exists in the organisations consulted to plan and develop business travel policy, nor has any software been developed to plan, manage and evaluate business travel policy and process. The research

evaluated the developed conceptual framework for business travel process management for its effectiveness and made recommendations for its effective use in organisations. The evaluated organisations gave positive feedback to use the framework in their organisations.

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APPENDICES

APPENDIX 1

SCOPING STUDY QUESTIONNAIRE

Scoping Study: Investigating the Process Implications of Business Travel within Organisations

1. What is business travel? Or how would you define business travel? What types of travel would you include in business travel?

2. What are the characteristics of business travel? What are the major differences of business travel between private and   public sectors of economy?

3. What are the issues to do with business travel?

4. What factors influence the type and volume of business travel?

5. How important, significant is business travel? (What are the biggest obstacles to business success? How big problem is business travel?/what transport problems are related to business travel?)

    a) To organisations

    b) To Society

    c) To individuals

6. What do business organisations want with to regard to business travel?

7. What innovative solutions can make business travel more financially and environmentally sustainable in the future?

8. What stakeholders are involved with business travel?

9. Who has good business travel practices? Who has bad business travel practices?

10. Sources of information/ suggestion about method/ any other people to contact?

APPENDIX 2

SURVEY QUESTIONNAIRE

The survey was undertaken by BOS online. Company background information was asked with survey questions because often some information such as: phone numbers, total employee numbers, turnover, numbers of sites are not available online or initial research.

Introductory page:

Survey: Investigating the Process Implications of Business Travel within Organisations

I am currently a PhD student at Loughborough University. My research aims to investigate the process implications of business travel within organisations.

This questionnaire aims to identify the processes involved in managing business travel. Structured questions have been used to meet this goal. Your response to this questionnaire is highly valued and will be treated in the strictest confidence. It will be used for academic purposes only.

I will be happy to share the findings of this survey, if you provide your full contact details.

Thank you for your help.

Farah Alamgir

Main Survey Page:

Note that once you have clicked on the CONTINUE button at the bottom of each page you cannot return to review or amend that page

This survey has 23 questions and should take approximately 20 minutes to complete.

B. PROCESS RELATED INFORMATION

2. To what extent do the following statements apply to your organisation's business travel processes?

	Make a selection as follows: SD=Strongly Disagree, D=Disagree, U=Unsure, A=Agree, SA=Strongly Agree and NA=Not Applicable					
	SD	D	U	A	SA	NA
a. We have a defined process for managing business travel in our organisation.						
b. Business travel planning is a part of our organisation strategy.						
c. We have analysed our current business travel process.						
d. We understand the business benefits of managing business travel.						
e. We have identified the bottlenecks and inefficiencies in our current business travel process.						
f. Our organisation seeks to influence the type and level of business travel employees undertake.						

g. Our current business travel process performs well in meeting our stated strategy objectives.							

3. What job functions are involved in the business travel process within your organisation?

	Job title
a. What job role in your organisation designed the process?	
b. What job role in your organisation manages the process?	

4. Where does business travel sit in your organisation - select most appropriate option(s)?

Human Resources

Finance

Estates/Facilities

Operations

Sales and Marketing

Outsourcing

Other (**please specify**):

5. What objectives does the business travel process in your organisation set out to achieve?

6. Which of these providers does your organisation currently use, or may consider using in the future? (Please select all that apply).

	Use	Consider	N/A
a. Business Travel Agent			
b. Corporate Card Provider			
c. Rail Booking Service			
d. Hotel Booking Agent			
e. Destination Management Companies			
f. Convention Bureaux and Tourist Boards			
g. Event Management Services			
h. Group Travel Providers			
i. Incentive Travel Agencies			
j. Meeting Management Companies			
k. Venue Finding Services			

7. Which of these technologies does your organisation currently use or would consider using in the future? (Please select all that apply).

	Use	Consider	N/A
a. Analysis, RFP and Reporting Tools			
b. Business Travel Agency Software			
c. Carbon Calculating and Offsetting			
d. End-to-End Solutions			

e. Expense Management			
f. Financial Services			
g. Meetings Management Technology			
h. Payment Tools			
i. Global Distribution Services			

8. Which of these traveller services does your organisation currently use or would consider using in the future? (Please select all that apply).

	Use	Consider	N/A
a. Self Booking Tools			
b. Video Conferencing or Telepresence			
c. Airport Parking			
d. Airport Lounge			
e. Currency Exchange			
f. Medical Assistance and Repatriation			
g. Mobile Telecommunications			
h. Insurance			
i. Interpreter & Translation Services			
j. Risk Management and Assessment			
k. Traveller Security Services			
l. Traveller Support Services			
m. Visa Services			

n. VAT Reclaim	

C. OUTCOMES OF BUSINESS TRAVEL

9. How much business travel was undertaken in your organisation in the last year?

	Annual business travel undertaken
a. Money (£)	
b. Time (hours)	
c. Distance (km)	
d. Carbon emissions (tonnes)	
e. Other	

10. What proportion of the following business types of business travel has your organisation undertaken in the last year?

	Please check the percentages add up to 100%
a. Meeting (internal)	
b. Meeting (external)	
c. Conference	
d. Training/Education	
e. Site visit	
f. Trade fair	
g. Other	

11. What proportion of business travel trips within your organisation were undertaken using the following travel modes in the last year?

	Please check the percentages add up to 100%
a. Air	
b. Car (own car)	
c. Car (pool/hire car)	
d. Bus	
e. Rail	
f. Cycle	
g. Walk	

12. What proportion of business travel trips by user type were undertaken by your organisation in the last year?

	Please check the percentages add up to 100%
a. Senior management	
b. Middle management	
c. Operational staff	

13. Do you have any other comments to make regarding the barrier and benefits of business travel to your organisation? Please state:

D. CONTEXT: FACTORS INFLUENCING THE LEVEL OF BUSINESS TRAVEL

This section seeks to identify the internal and external factors governing the level and type of business travel in your organisation.

14. To what extent do you agree or disagree that the following **political and economic factors** influence the level and type of business travel in your organisation? Please explain your responses.

	Make a selection as follows: SD=Strongly Disagree, D=Disagree, U=Unsure, A=Agree, SA=Strongly Agree					Explain
	SD	D	U	A	SA	
a. Legislation and regulation						
b. Government policies						
c. Taxation systems						
d. The growth rate of the national economy						
e. Interest rates						
f. Currency exchange rates						

15. To what extent do you agree or disagree that the following **social, environmental and technological factors** influence the level and type of business travel? Please explain your responses.

	Make a selection as follows: SD=Strongly Disagree, D=Disagree, U=Unsure, A=Agree, SA=Strongly Agree					Explain
	SD	D	U	A	SA	
a. Demographic changes						

	SD	D	U	A	SA
b. Environmental issues					
c. Work-life balance of employees					
d. Use of information technology					

16. To what extent do you agree or disagree that the following **organisational and employee factors** influence the level and type of business travel? Please explain your responses.

	Make a selection as follows: SD=Strongly Disagree, D=Disagree, U=Unsure, A=Agree, SA=Strongly Agree					Explain
	SD	D	U	A	SA	
a. Organisational size						
b. The existence of diverse units, their number						
c. Geographically separated offices						
d. Communication between units						
e. How organisations organise work						
f. Willingness to travel of employee						
g. Hierarchical position of employee						
h. Income						
i. Gender						

17. To what extent you agree or disagree that the following **trip factors** influence the level and type of business travel? Please explain your responses.

	Make a selection as follows: SD=Strongly Disagree, D=Disagree,			Explain

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	U=Unsure, A=Agree, SA=Strongly Agree					
	SD	D	U	A	SA	
a. Cost of travel						
b. Flexibility of travel						
c. Cost of accommodation						
d. Quality of accommodation						
e. Traveller security						

D. FUTURE OF BUSINESS TRAVEL

18. This question seeks to determine what the ideal business travel management process would look like. Please rank the following statements in order of importance (1=most important to 5=least important):

	Importance
a. Be less bureaucratic and more flexible for users	1st, 2nd, 3rd, 4th, 5th
b. Provide better quality cost information to decision makers in the organisation	1st, 2nd, 3rd, 4th, 5th
c. See the reduction of environmental impacts as having a high priority	1st, 2nd, 3rd, 4th, 5th
d. See the quality of the business travel experience for staff as having a high priority	1st, 2nd, 3rd, 4th, 5th
e. See the cost of business travel to the organisation as having a high priority	1st, 2nd, 3rd, 4th, 5th

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19. What objectives should the business travel process be looking to meet in your organisation? Please list.

20. What would be the main barriers to changing the business travel process in your organisation?

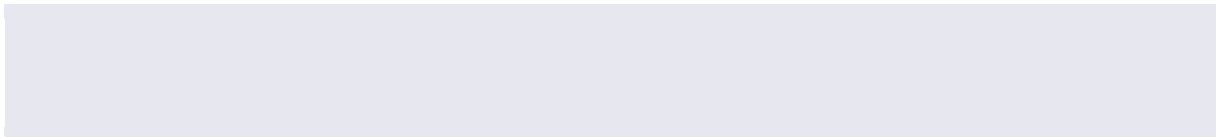**21.** Has your organisation recently looking to change, its approach to business travel?

No

Yes

a. When did/will (year) your business travel management process changes?

b. How did/will it change?

c. Why did/will it change?

22. How might Government/other agencies support your organisation in shifting to a more effective and efficient business management process? Please explain.

23. If you would like a copy of the summary report please provide your email address.

End of Questionnaire

APPENDIX 3

SURVEY ORGANISATION'S POLICY DOCUMENT DETAILS

	Organisation type and size	Policy Document last updated	Policy Document title/ type	Document issued by
C1	Manufacturing, large organisation	2013	Global Policy and Standards: Business Travel	Procurement
C2	Electric, Gas, Water supply, large organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Human Resource (found from the survey report)
C3	Finance, large organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Human Resource (found from the survey report)
C4	Finance, large organisation	2013	Group Colleague Expenses Procedure	HR Director: strategy, policy and employee relations
C5	Whole sale, retail, Large organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Human Resource (found from the survey report)
C6	Manufacturing, large organisation	2013	Travel and Expenses Policy for UK Businesses	Global Travel Advisory Group
C7	Finance, small organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Human Resource (found from the survey report)
C8	Whole sale, retail, Large organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Organisation do not have written travel policies
C9	Whole sale, retail, Large organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Finance (found from the survey report)
C10	Education, large organisation	2013	Travelling on University work overseas	Procurement

C11	Public Admin, large organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Human Resource (found from the survey report)
C12	Manufacturing, medium organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Finance (found from the survey report)
C13	Education, health, social work, large organisation	2013	Sustainable travel	Finance
C14	Education, health, social work, medium organisation	2013	Travel Plan	Human Resources
C15	Transport, storage and communication, medium organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Human Resource (found from the survey report)
C16	Transport, storage and communication, small organisation	2000	Travel policy	Directors
C17	Transport, storage and communication, small organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Sales and Marketing (found from the survey report)
C18	Construction, large organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Human Resource (found from the survey report)
C19	Transport, storage and communication, small organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Sales and Marketing (found from the survey report)
C20	Other service, small organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Human Resources
C21	Education, health, social work, large	2010	Travel Plan	Operations

	organisation			
C22	Finance, small organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Sales and Marketing (found from the survey report)
C23	Finance, large organisation	2013	Travel Policy	Finance
C24	Public admin, large organisation	2010	Review of Travel arrangements	Travel Unit
C25	Public admin, large organisation	2011	Staff Travel Policy	Human Resources
C26	Construction , Medium organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Finance
C27	Construction, large organisation	2013	Travel and Expenses Policy	Human Resources
C28	Wholesale and retail, large organisation	2013	Travel policy	Human Resources
C29	Education, health, social work, large organisation	2010	Travel, Expenses and Benefit Policy	Finance
C30	Manufacturing, small organisation	No permission from the organisation to access the form	No permission from the organisation to access the form	Human Resource (found from the survey report)
C31	Transport, storage and communication, large organisation	2009	Business Travel and Expenses Policy	Sales and Marketing (found from the survey report)
C32	Transport, storage and communication, small organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Human Resource (found from the survey report)

C33	Transport, storage and communication, small organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Human Resource (found from the survey report)
C34	Transport, storage and communication, small organisation	Organisation do not have written travel policies	Organisation do not have written travel policies	Human Resource (found from the survey report)
C35	Transport, storage and communication, small organisation	2009	Travel Meeting and Entertainment Policy	Human Resources
C36	Transport, storage and communication, small organisation	2009	Travel Policy	Facilities
C37	Manufacturing, Small organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Sales and Marketing (found from the survey report)
C38	Finance, Medium organisation	2009	Corporate Travel Plan	Operations
C39	Manufacturing, large organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Human Resources
C40	Education, health and social work, large organisation	2013	Purchasing Consortium Policy	Finance (found from the survey report)
C41	Education, health and social work, large organisation	Not Known, organisation did not respond	Not Known, organisation did not respond	Human Resource (found from the survey report)

APPENDIX 4

<div align="center">

CASE STUDY QUESTIONNAIRES

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1 (a) Case Study (Employer Questionnaire): Investigating the process implications of business travel within organisations

This questionnaire was distributed via email a week before undertaking the interview to allow the interviewee to think about the answers.

Main Page

This questionnaire is a part of a research programme at Loughborough University aimed at establishing the process involved in managing business travel. Structured questions have been used to meet this goal. Your response to this questionnaire is highly valued and will be treated in the strictest confidence. It will be used for academic purposes only.

COMPANY BACKGROUND INFORMATION

Employee Name:	Role:
Company Name:	Web Site:
Address:	Tel:
Total employee no:	Turnover:
Number of sites:	Business sector:

1. PROCESS RELATED INFORMATION

1.1 Please explain the current process for managing business travel within your organisation.

1.2 Is business travel planning a part of your organisational strategy? If so, how and why?

1.3 Does your organisation seek to influence the type and level of business travel by its employees? If so, how and why?

1.4 Who is involved in designing, managing and using the business travel process within your organisation?

1.5 In what departments does business travel sit in your organisation and or outside (i.e. are any elements outsourced)?

1.6 What external and internal factors have influenced the design of the business travel process within your organisation?

1.7 What objectives does the business travel process in your organisation set out to achieve?

1.8 How do you feel the current business travel process performs in terms of meeting its stated objectives?

1.9 To which regions does your company undertake business travel? :
(please tick all that apply)

    a) Africa

    b) Asia

    c) Australia

    d) Domestic UK

    e) Western Europe

    f) Eastern Europe

    g) North America

    h) South America

    i) New Zealand

    j) Middle East

    k) N/A

1.10) Which of these providers does your company currently use or would consider using in the future?:
(please tick all that apply)

    a) Business Travel Agent: Use   Consider

    b) Corporate Card Provider: Use   Consider

c)	Rail Booking Service:	Use	Consider
d)	Hotel Booking Agent:	Use	Consider
e)	Destination Management Companies:	Use	Consider
f)	Convention Bureaux and Tourist Boards :	Use	Consider
g)	Event Management Services:	Use	Consider
h)	Group Travel Providers:	Use	Consider
i)	Incentive Travel Agencies:	Use	Consider
j)	Meeting Management Companies :	Use	Consider
k)	Venue Finding Services:	Use	Consider

1.11) Which of these technologies does your company currently use or would consider using in the future?:
(please tick all that apply)

a)	Analysis, Request for Proposal (RFP) and Reporting Tools :	Use	Consider
b)	Business Travel Agency Software :	Use	Consider
c)	Carbon Calculating and Offsetting:	Use	Consider
d)	End-to-End Solutions :	Use	Consider
e)	Expense Management:	Use	Consider
f)	Financial Services:	Use	Consider
g)	Global Distribution Services :	Use	Consider
h)	Meetings Management	Use	Consider

Technology :

i)   Payment Tools :   Use   Consider

1.12) Which of these traveller services does your company currently use or would consider using in the future:
(please tick all that apply)

a)   Self-Booking Tools :   Use   Consider

b)   Video Conferencing or   Use   Consider
     Telepresence:

c)   Airport Parking: Use   Consider

d)   Airport Lounge :   Use   Consider

e)   Currency Exchange: Use   Consider

f)   Medical Assistance and   Use   Consider
     Repatriation:

g)   Mobile   Use   Consider
     Telecommunications:

h)   Insurance   Use   Consider

i)   Interpreter and Translation Use   Consider
     Services:

j)   Risk Management and   Use   Consider
     Assessment:

k)   Traveller Security   Use   Consider
     Services:

l)   Traveller Support   Use   Consider
     Services:

m)   Visa Services: Use   Consider

n)   VAT Reclaim: Use   Consider

1.13 To what extent do the following statements apply to your organisation's business travel processes?

No	Statement	SA	A	U	D	SD	NA	Reasons
1	We have analysed our current business travel process							
2	We have identified the bottlenecks and inefficiencies in our current business travel process							
3	We understand the business benefits of managing business travel							
4	Business travel planning is a part of our organisational strategy							
5	Our organisation seeks to influence the type and level of business travel we undertake.							
6	Our current business travel process performs well in meeting our stated strategy objectives							

SA=Strongly agree, A=Agree, U=Unsure, D=Disagree, SD=Strongly disagree, NA= Not applicable

2. OUTCOMES OF BUSINESS TRAVEL

2.1 How much business travel was undertaken in the last year? (£, time, distance, CO_2)

2.2 What proportion of the following business travel types has your organisation undertaken in the last year? Note that all annual business related travel = 100%

Meeting (internal) _____%

Meeting(External) _____%

Conference _____%

Training/Education _____%

Site visit _____%

Trade Fair _____%

2.3 What proportion of business travel within your organisation was undertaken using the following travel modes in the last year?

Air   _____%

- ❑ Car (own car)   ❑   _____%
- ❑ Car (pool/hire car)   ❑   _____%
- ❑ Car (company car)   ❑   _____%
- ❑ Bus   ❑   _____%
- ❑ Rail   ❑   _____%
- ❑ Cycle   ❑   _____%
- ❑ Walk   ❑   _____%

2.4 What proportion of business travel by user type was undertaken by your company in the last year?

Senior management   _____%

Middle management   _____%

Operational staff   _____%

2.5 Do you have any other comments to make regarding the costs and benefits of business travel to your organisation? Please state.

3. CONTEXT: FACTORS INFLUENCING THE LEVEL OF BUSINESS TRAVEL

This section seeks to identify the internal and external factors governing the level and type of business travel in your organisation.

3.1 To what extent do you agree or disagree do the following factors influence the level and type of business travel? Please explain your responses.

	Strongly disagree	Disagree	Unsure	Agree	Strongly agree	Explain
Political factors						
Legislation and regulation						
Government policies						
Taxation systems						
Political stability						
Economic factors						
Cost effectiveness while providing a staff with a quality service						
The growth rate of the national economy						
Recession						
Interest rate						
Currency exchange rates						
Industry ownership						
Social factors						
Demographic changes						
Environmental issues						
Lifestyle development						
Accommodation; i.e. hotels, transport						
	Strongly disagree	Disagree	Unsure	Agree	Strongly	Explain

					agree	
Technological factors						
Traffic growth						
New inventions						
Use of information technology and modes						
Organisational factors						
Different sectors						
Different sizes of organisations						
The existence of diverse units, their number						
Geographical distributions of the organisations offices						
Communication system between units						
How a company organises work						
Employee factors						
Mobility of employee						
Hierarchical position						
Income						
Gender						

4. FUTURE OF BUSINESS TRAVEL

4.1 In your opinion, what would the ideal business travel process look like?

4.2 What objectives should the business travel process be looking to meet in your organisation?

4.3 What would/should be the main motivations for changing the business travel process in your organisation?

4.5 Who would/ should drive this change in your organisation?

4.6 What would be the main barriers for changing the business travel process in your organisation?

4.7 Is your organisation looking to change its approach to business travel? If so, when, how and why?

4.8 How might Government/other agencies support your organisation in shifting to a more effective and efficient business management process (e.g. provide better information, reduce regulations, and change tax rules). Please explain.

3 (b) Case Study (Employee Questionnaire): Investigating the process implications of business travel within organisations

This questionnaire is a part of a research programme at Loughborough University aimed at establishing the process involved in managing business travel. Structured questions have been used to meet this goal. Your response to this questionnaire is highly valued and will be treated in the strictest confidence. It will be used for academic purposes only.

EMPLOYEE BACKGROUND INFORMATION

Employee Name:	Role:
Company Name:	

1. PROCESS RELATED INFORMATION

1.1 Please explain the process by which you currently undertake business travel

a) Self booking (manual booking)
b) Self booking (online booking)
c) Business travel agent
d) Arranged by company staff (manual booking)
e) Arranged by company staff (online booking)

1.2 Does your organisation seek to influence the type and level of business travel? If so,

how and why?

1.3 How do you feel the current business travel process performs in terms of meeting

your business travel needs?

1.4 Who makes the decision on the travel destination?

a) Individual Traveller

b) Employer

c) Client organisation

d) Committee or association with which Traveller is associated

e) Wholly external organisation

1.5 Which of these meeting venues does your company use?
(please tick all that apply)

1. Conference centres
2. Convention/Exhibition centres
3. Hotels
4. Other Venues
5. None

1.6 Where does your company hold business travel? :

(please tick all that apply)

a) Africa

b) Asia

c) Australasia

d) Domestic UK

e) Western Europe

f) Eastern Europe

g) North America

h) New Zealand

i) Middle East

j) South America

k) N/A

1.7 How do you feel the current business travel process performs in terms of meeting its stated objectives?

a) Very Well b) well b) not very well c) occasionally meets d) never meets

1.8 In which of the following departments does business travel sit in your organisation and or outsourced (i.e. are any elements outsourced)?

a) Human Resources
b) Accounts
c) Outsourced
d) Other

1.9 Which of these providers does your company currently use or would consider using in the future:
(please tick all that apply)

a) Business Travel Agent: Use   Consider

b) Corporate Card Provider: Use   Consider

c) Rail Booking Service: Use   Consider

d) Hotel Booking Agent: Use   Consider

e) Destination Management   Use   Consider
    Companies:

f) Convention Bureaux &   Use   Consider

Tourist Boards :

g) Event Management   Use   Consider
    Services

h) Group Travel Provider :   Use   Consider

i) Incentive Travel Agency :   Use   Consider

j) Meeting Management   Use   Consider
    Company :

k) Venue Finding Service: Use   Consider

1.10 Which of these technologies does your company currently use or would consider using in the future:
(please tick all that apply)

a) Analysis, RFP and   Use   Consider
    Reporting Tools :

b) Business Travel Agency   Use   Consider
    Software :

c) Carbon Calculating and   Use   Consider
    Offsetting:

d) End-to-End Solutions :   Use   Consider

e) Expense Management: Use   Consider

f) Financial Services: Use   Consider

g) Global Distribution   Use   Consider
    Services :

h) Meetings Management   Use   Consider
    Technology :

i) Payment Tools :   Use   Consider

1.11 Which of these Traveller services does your company currently use or would consider using in the future:
(please tick all that apply)

a) Self-Booking Tools :   Use   Consider

b)	Video Conferencing or Telepresence:	Use	Consider
c)	Airport Parking:	Use	Consider
d)	Airport Lounge :	Use	Consider
e)	Currency Exchange:	Use	Consider
f)	Medical Assistance and Repatriation:	Use	Consider
g)	Mobile Telecommunications:	Use	Consider
h)	Insurance	Use	Consider
i)	Interpreter & Translation Services :	Use	Consider
j)	Risk Management and Assessment:	Use	Consider
k)	Traveller Security Services:	Use	Consider
l)	Traveller Support Services:	Use	Consider
m)	Visa Services:	Use	Consider
n)	VAT Reclaim :	Use	Consider

2. OUTCOMES OF BUSINESS TRAVEL

2.1 How much business travel did you undertake in the last year?
   a) Spent (£)
   b) Time
   c) Distance (mile)

2.2 What proportion of the following business travel types did you undertake personally in the last year? Note that all annual business related travel = 100%

 Meeting (internal)   _____%

Meeting(External)   _____%

Conference   _____%

Training/Education   _____%

Site visit   _____%

Trade Fair   _____%

2.3 What proportion of business travel did you undertake using the following travel modes in the last year?

Air   _____%

   1. Car (own car)   2. _____%

   3. Car (pool/hire car)   4. _____%

   5. Car (company car)   6. _____%

   7. Bus   8. _____%

   9. Rail   _____%

Cycle   _____%
Walk   _____%

2.5 What proportion of business travel did you undertake in the last year?

Local   _____%

Regional   _____%

National   _____%

International   _____%

2.6 Overall do you see business travel as a cost or a benefit?

   Explain:

2.6 What is the degree of compulsion on you to take a business trip?

    a) No choice: obliged to travel whether want or not

    b) Some choice of date but trip must be taken at some time

    c) Choice of whether or not to take the trip at all

3. CONTEXT: FACTORS INFLUENCING THE LEVEL OF BUSINESS TRAVEL

3.1 What factors govern the level and type of business travel that you do?

a) Political factors
b) Economic factors
c) Environmental factors
d) Other social factors: ie: Career development

4. FUTURE OF BUSINESS TRAVEL

4.1 In your opinion what would the ideal business travel process look like?

4.2 In your what objectives should the business travel process be looking to meet in your organisation?

4.3 What would/should be the main motivations for changing the business travel process in your organisation?

4.4 Who would/ should drive this change in your organisation?

4.5 What would be the main barriers for changing the business travel process in your organisation?

4.6 How might the Government/other agencies support your organisation in shifting to a more effective and efficient business management process (e.g. provide better information, reduce regulations, change tax rules). Please explain.

APPENDIX 5

BTPM Framework Evaluation Questionnaire

Evaluation: Business Travel Process Management Framework

Evaluator's role and responsibility:

Organisation:

Experience:

Date:

Please read the accompaning attachment on Business Travel Process Management (BTPM) Framework for organisations and kindly answer the following questions by giving them appropriate scores (1= strongly disagree, 2= disagree, 3 neutral, 4=agree, and 5=strongly agree.

Section 1: Review the Content of the BTPM Framework and Elements with it. Do you agree that the proposed framework:	Ranking (1=strongly disagree and 5= strongly agree)				
	1	2	3	4	5
Presents an appropriate set of instructions for developing a business travel management process in an organisation.					
Identifies the appropriate provision of phases needed.					
Defines the activities at appropriate levels.					
Specifies the appropriate roles and responsibilities for each activity.					
Specifies the appropriate tools relating to each activity.					
Please add further comments					

Section 2: Review the Clarity of the BTPM Framework Do you agree that the proposed framework:	Ranking (1=strongly disagree and 5= strongly agree)				
	1	2	3	4	5
Clearly sets out the business travel process management solution.					
Clearly addresses the business travel process management related steps in each phase.					
Clearly defines the activities.					
Clearly describes the appropriate roles and responsibilities for each activity					
Clearly describes the appropriate tools relating to each activity.					
Please add further comments					

Section 3: Review the Application of the BTPM Framework To what degree, do you agree with the statement that:	Ranking (1=strongly disagree and 5= strongly agree)				
	1	2	3	4	5
The BTPM Framework is easy to read and understand.					
The BTPM Framework is easy to use.					
The BTPM Framework is relevant to the current management process in your organisation.					
The BTPM Framework could be easily applied to your organisation. Explain this reasons for response:					
The BTPM Framework will significantly benefit your organisation. Explain this reason for your response:					
The BTPM Framework leads to the ideal business travel management process, Explain reason for your response:					

Please add further comments

| Section 4: Review the Four Phases of the BTPM Framework

To what degree do you agree with the statement that the four phases of the BTPM framework can help to:	**Ranking (1=strongly disagree and 5= strongly agree)**				
	1	**2**	**3**	**4**	**5**
Identify business travel related issues and, therefore aid with improved management of the business travel process.					
Identify and analyse the organisational input requirements managing business travel.					
Identify and analyse the organisational controls to manage business travel.					
Identify and analyse the organisational outcomes to manage business travel.					
Review the overall effectiveness of the BTPM framework in an organisation.					
Please add further comments					

General Comments

1	What positive impacts do you see for organisations using the BTPM Framework?
2	What barriers and challenges would you need to overcome if your organisation decided to adopt the BTPM Framework?
3	What improvements would you suggest need to be made to the overall BTPM Framework?

Further comments and suggestions