



**Jane Roth**, Director of Administration, manages Datatel's corporate travel program, and has since 1995. In addition, she oversees Facilities and Purchasing, and serves

as the Executive Director of the Datatel Scholars Foundation.

**Datatel Inc.**, provides over 750 colleges and universities across North America with fully-integrated administrative software systems and e-marketing solutions, as well as essential consulting and training services.

**Datatel Inc's annual travel spend** is approximately \$4 million - \$2 million in air spend, \$500,000 in car rental, and \$1.5 million in hotel bookings.

Contact a Sales  
Consultant today  
1-866-328-0110



## Best Practice Case Study

### Collaboration Leads to the Right Travel Program Choice for Datatel

With employees who regularly visit hundreds of small college towns, Jane Roth wanted to be sure she had the right solution before transitioning Datatel from a completely onsite travel service to a program that encouraged online self-booking whenever possible. Jane took a structured, collaborative approach to select an agency that accommodated all of her stakeholders' needs, as well as reduced Datatel's travel expense by a full 20 percent.

### Taking Datatel's Travel Program to the Next Level

After years of utilizing onsite travel agents, Jane saw an opportunity to reduce her company's travel costs by incorporating online booking into Datatel's travel program, but there was a challenge. Datatel's employees often traveled to several small college towns in a single week, many of which were served by regional airports with limited service and lodging accommodations.

To successfully serve all of Datatel's travelers, Jane needed to find an **agency that offered both an intuitive, online booking solution and experienced onsite agent services.**

### Steps to Success

#### Select a Travel Management Consultant

Recognizing that Datatel did not have expertise in evaluating agency online booking solutions, Jane brought in a **corporate travel management consultant** to assist in the selection process. John Heilner of Management Alternatives was selected based on the company's reputation and experience working with companies similar in size to Datatel.

#### Develop and Distribute an RFP

Together, Datatel and Management Alternatives developed a set of evaluation criteria that were of highest importance to Datatel and developed a corresponding Request For Proposal (RFP). The RFP was distributed to six corporate travel agencies for their response.

## Identifying Travel Program Goals

The new travel program envisioned for Datatel was one that combined an online booking solution and onsite agent service to:

- Increase productivity, and offer 24/7 access to travel planning
- Support employee self-booking at least 50 percent of the time
- Reduce travel agency and direct supplier expenses
- Assist in monitoring compliance and tracking supplier performance against vendor commitments
- Allow Datatel to rely on one onsite agent

## Identify Three Finalists

Based on the RFP responses to the evaluation criteria, the number of potential agency partners was narrowed down to three finalists. Each finalist was able to provide both self-booking and onsite agent services to Datatel.

## Create a Cross-Functional Review Team

Jane created a '**Corporate Travel Self-Booking Tool Review Team**' with representatives from each of Datatel's key stakeholder groups including:

- Sales
- Marketing
- Information Technology
- Accounting
- Corporate Training
- Professional Services
- Individuals responsible for arranging travel

The team members were highly involved in the evaluation of the final three agencies because their input was needed to ensure the chosen online booking solution could work for, and be accepted by, a majority of Datatel's employees.

## Demo the Three Booking Solutions

The three finalists provided an onsite demonstration of their booking solutions to the entire review team.

## Run Test Scenarios

Datatel set up a testing room where members of the review team could test each solution using demo accounts set up by the three finalists. The team used ten '**Travel Self-Booking Tool Demo Scenarios**,' that mimicked Datatel's unique travel patterns, to evaluate and score each solution against 16 key functionalities that they required.

## Choose New Agency Partner

Incorporating all of the feedback from the review team, Datatel selected Egencia<sup>™</sup> as its agency partner. Egencia's online solution proved the most capable of meeting Datatel's criteria and was considered to be the most user-friendly of the solutions evaluated.

## Identify Onsite Agent

Egencia provided an experienced onsite travel consultant, Dana Firth, who is capable of handling the complex trip requirements of Datatel employees.

## Datatel's Evaluation Process

### Sample Travel Self-Booking Tool Demo Scenarios

For the three finalists, Datatel created 'Travel Tool Demo Scenarios', such as:

- Book air, car, and hotel for a trip to Walla Walla, Washington.
- Book a trip from BWI to Amarillo, Texas on Southwest
- Book a trip from IAD to DFW, rent a car, and drive to Oklahoma City where you will fly back to IAD, separating the flights by several days.

### Datatel's Travel Self-Booking Tool Evaluation Criteria

The following key criteria were used by Datatel to evaluate online booking solutions:

- Travelers can plan and book 24/7
- Travelers can update their own profile
- Customization is available for recurring trips
- Travel arranger functionality is included
- Integration of Web fares
- Travel policy compliance can be optimized through programmed allowable options and "prompts" for out of policy
- Pre-trip approval option (a forecasted need)
- Mechanism to broadcast messages to travelers targeted by topic (air, car, hotel)
- Ability to focus on preferred suppliers through display screen and prompts
- Integration of "onsite" agent with the self-booking tool
- Emergency management – ability to locate travelers quickly
- Real-time reporting

## Train Employees

Prior to launching the new program Jane and Sharon Ruzzi, Datatel's new Egencia Account Manager, set up and delivered a series of training sessions to help Datatel employees adopt the new online booking solution. In addition, a **"Tips and Tricks" document** was created specifically for Datatel employees and made available through the company's intranet. On a regular basis, training is arranged for new employees, employees moving into jobs requiring travel, and managers who are responsible for traveling employees. This consistent training offering ensures a high adoption rate of the travel program.

## Launch Program

Datatel launched the **new travel program** to all its employees, via a coordinated internal communications program. The communications promoted the new online booking solution and its benefits, as well as the fact that employees still had access to onsite agent services.

## The Post-Implementation Results

Since transitioning to the new travel program, Datatel has seen dramatic results.

### Adoption of Online Tool Exceeds Expectations

Datatel employees quickly adopted to the online booking solution for most of their travel planning needs. Online adoption continued to climb post-launch and it now stands at 78 percent. With an onsite travel consultant available, Jane **'never expected to see it reach such a high percentage.'** As a result, Datatel's assigned onsite travel consultant has been able to take on additional responsibilities.

### 24/7 Access to Travel Planning

Datatel employees now plan travel around the clock, regardless of their location. If agent assistance is required when the onsite agent is unavailable, employees have 24/7 toll-free access to Egencia's base of experienced travel consultants.

### 20 percent Reduction in Travel Costs

Since rolling out the new travel program, the combination of lower agency-related costs and smarter, lower cost travel decisions being made online by employees, Datatel has seen a **savings of 20 percent per year** on its overall travel costs.

### Improved Program Monitoring and Tracking

Jane describes the ability to generate valuable online reports immediately as 'wonderful.' Rather than waiting for an agency to generate a report, Datatel can now track the travel program's performance at any time and is able to identify new cost saving opportunities, such as advance purchasing habits among Datatel travelers. Datatel is also pleased with the capability to immediately locate travelers in the case of an emergency, such as Hurricane Katrina.

### Key Online Reports used by Datatel, Inc.

- **Advance Purchase Summary**  
To ensure travelers are booking in advance
- **Travel Overview**  
To review average ticket price, hotel nightly rate, and car rental daily rate
- **Total Air Spend by Airline**  
To determine an airline's share of Datatel's travel
- **Air Savings Detail**  
To identify missed savings opportunities
- **Reason Code Reports**  
To review "out of policy" bookings
- **Total Hotel Spend by City**  
To identify new negotiated agreement opportunities

### Set Up for Future Success

Looking to continually improve Datatel's travel cost management, Datatel is developing a new travel and expense reimbursement policy. Once completed and to ensure compliance, the policy enforcement and reporting tools will be leveraged via Egencia.

### A Few Words of Advice from Jane

"If you're looking to move to a new travel program, take the time to identify and understand your goals, be collaborative across the company, and think big picture."

Contact a Sales  
Consultant today  
1-866-328-0110

