



# Financial Operations and Systems

**Travel Management Transformation Initiative**  
**The Journey Continues.....**



## Travel management at UoS: Today's storyboard

- What we told you last year
- Where are we today against 2005/2006 goals
- June 2006 SWOT analysis
- The traveller's universe and next wave initiatives
- Management reporting is critical to success
- Personal observations regarding transformation



## What we told you last year



## What we told you last year – key points

- Travel policy defined but not rolled out and adopted across the university
- 100% paper-based approval, reimbursement, and acquittal process
- 50% of travel paid via AP reimbursement system
- TMC rationalisation objective of moving from 100+ providers to preferred panel of 3
- Limited influence and initiatives to manage \$20M+ of travel spend
- Weakness around duty of care to travellers as illustrated by Boxing Day tsunami



## Where are we today against 2005/2006 transformation goals



## Where are we today against transformation goals

Goal	Status
• Travel policy rolled out and accepted UoS-wide	😊
• Online travel approval and acquittal process implemented (Spendvision)	😊
• Reimbursement via Spendvision	😊
• 3 preferred TMCs and exception management in place	😊
• Influence on travel spend (air 😊; hotel 😞, ground transportation 😞)	😞
• Duty of care management system implemented	😊



## June 2006 SWOT analysis



## Travel management SWOT analysis – June 2006

### Strengths

- Vision: online, \$ leverage, paperless/automated
- Overt executive support for transformation
- Management system covering e2e process
- Movement of approval and reconciliation processes online
- Exception management; 'name & shame'
- Duty of care (e.g. Bombing of Mumbai trains)
- Relentless education programme

### Opportunities

- Expand current online tool to cover hotel and ground transportation: 'one stop shop'
- Influence event/group travel
- Adjust risk position with card provider
- Development of non invasive auditing solution to potentially review 100% of all transactions
- Further development of 'self help' tools

### Weaknesses

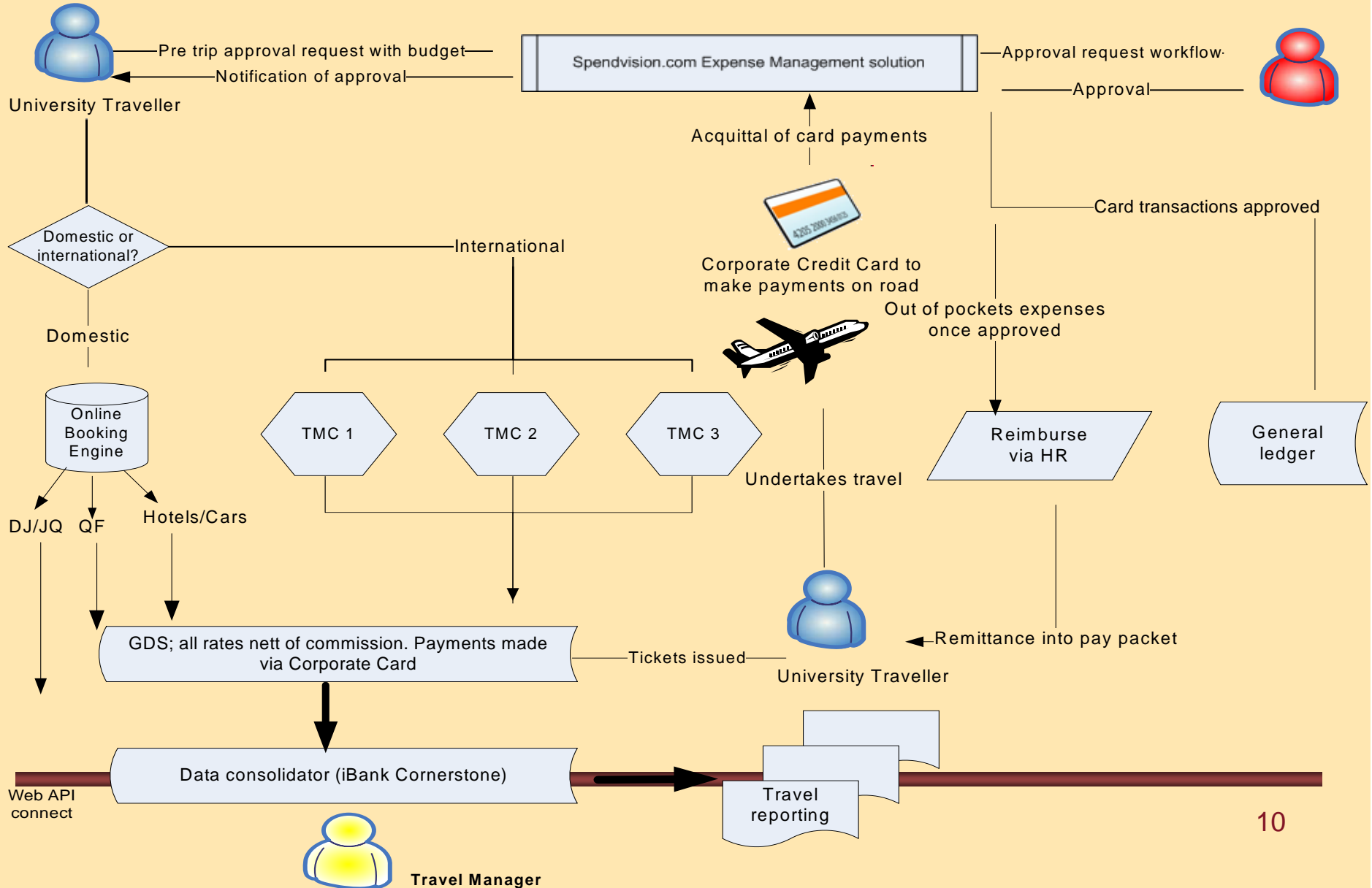
- Influence on, and relative inflexibility of, suppliers
- Total spend leverage
- Forecasting demand through CRM
- Strategic approach to accommodation and ground transportation
- Invasive approach to auditing and audit management

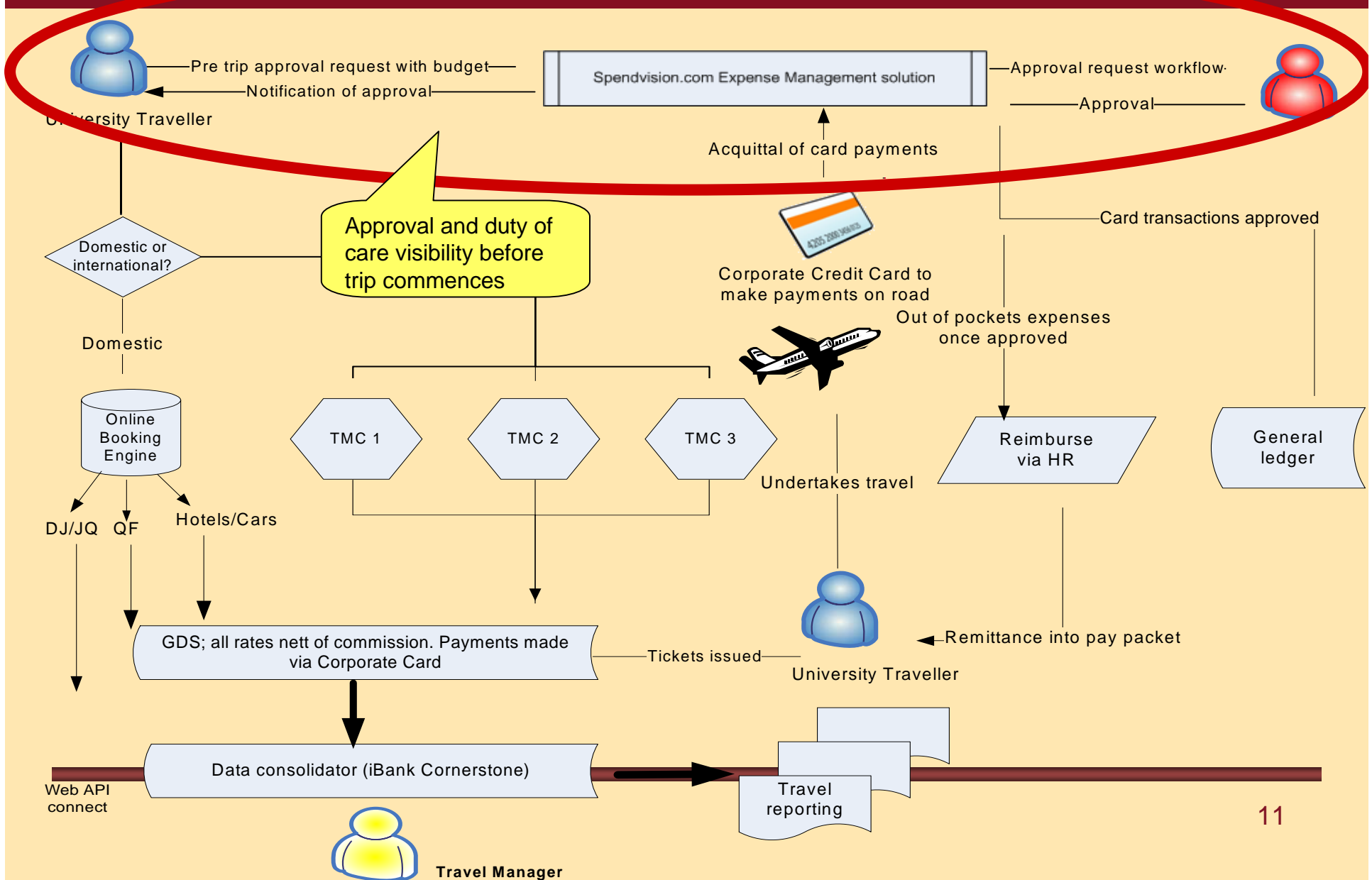
### Threats

- Lose momentum through non closure of opportunities
- Technology underperformance and reliability
- Loss of executive support for initiatives
- Continued consolidation of supply base and emergence of very dominant suppliers
- Resource management
- Supplier opportunism

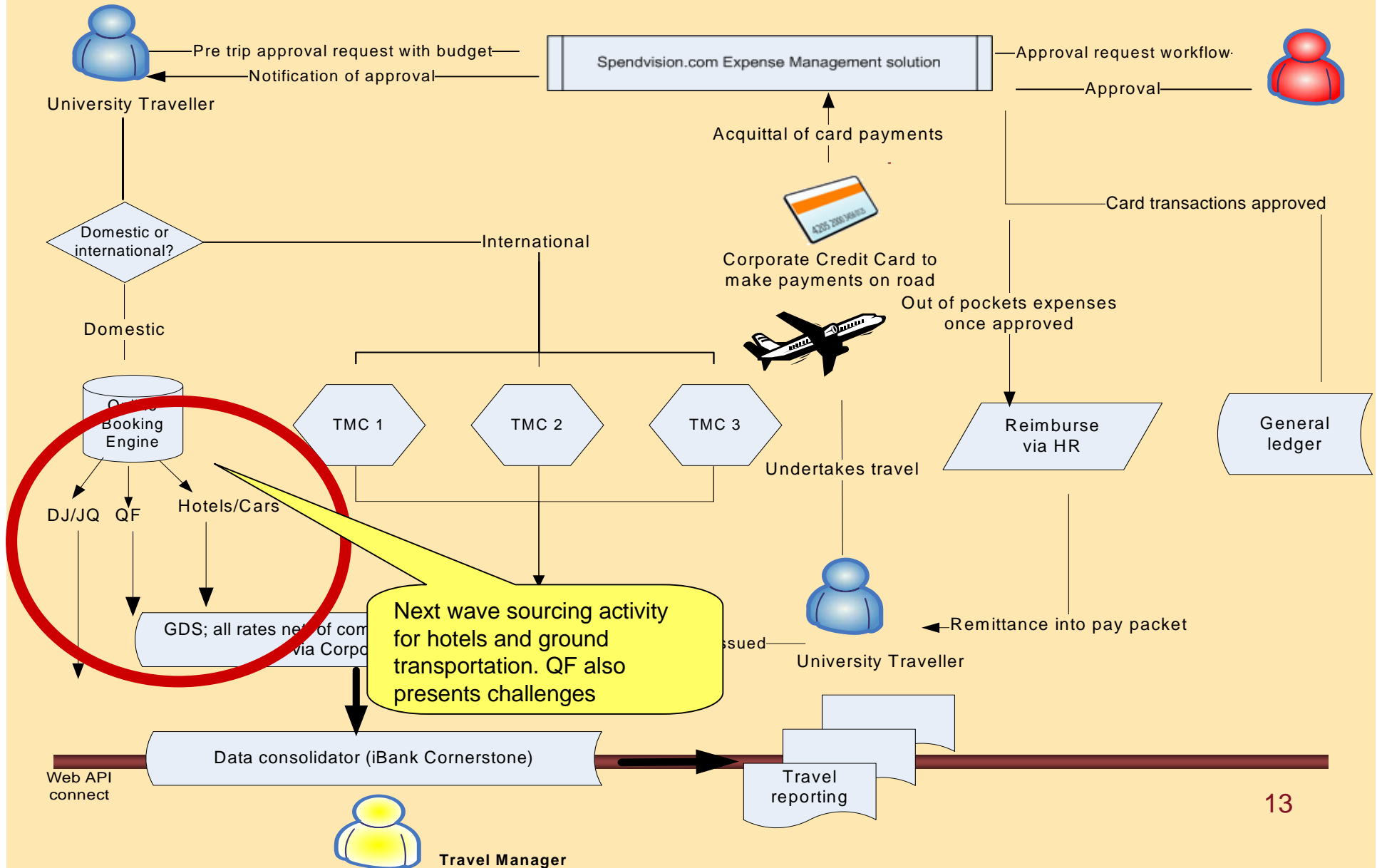


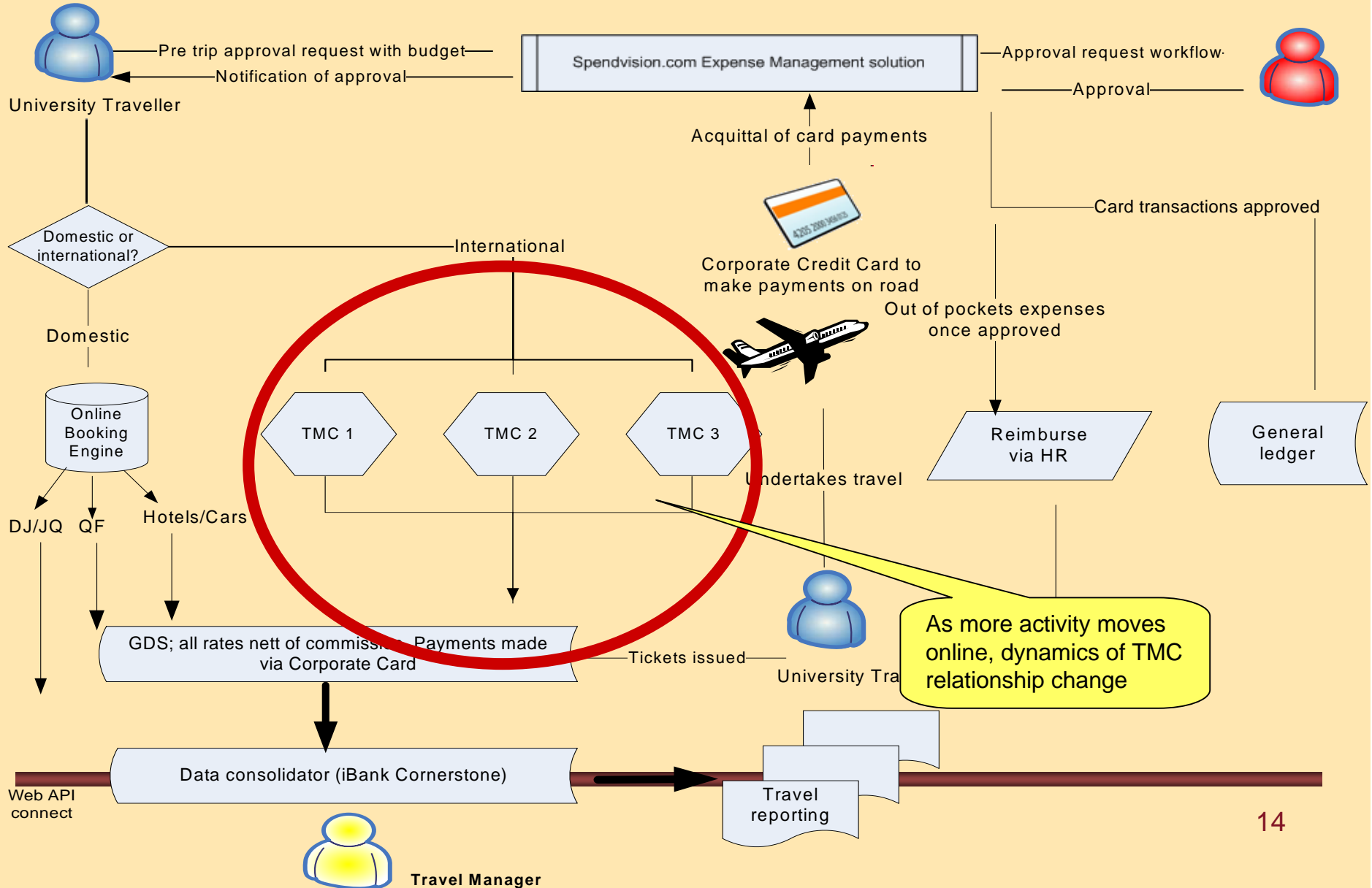
## The traveller's universe and next wave initiatives

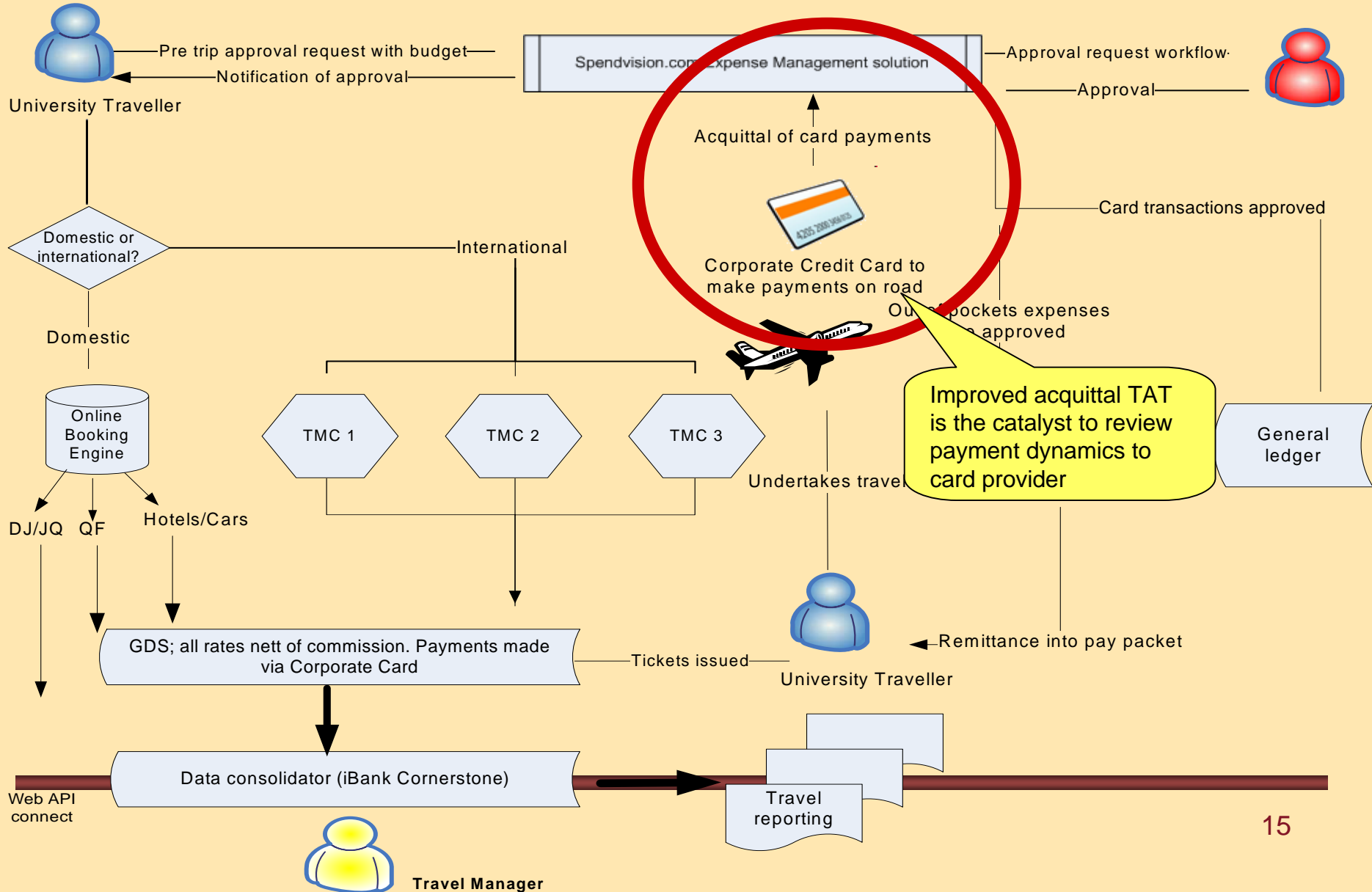


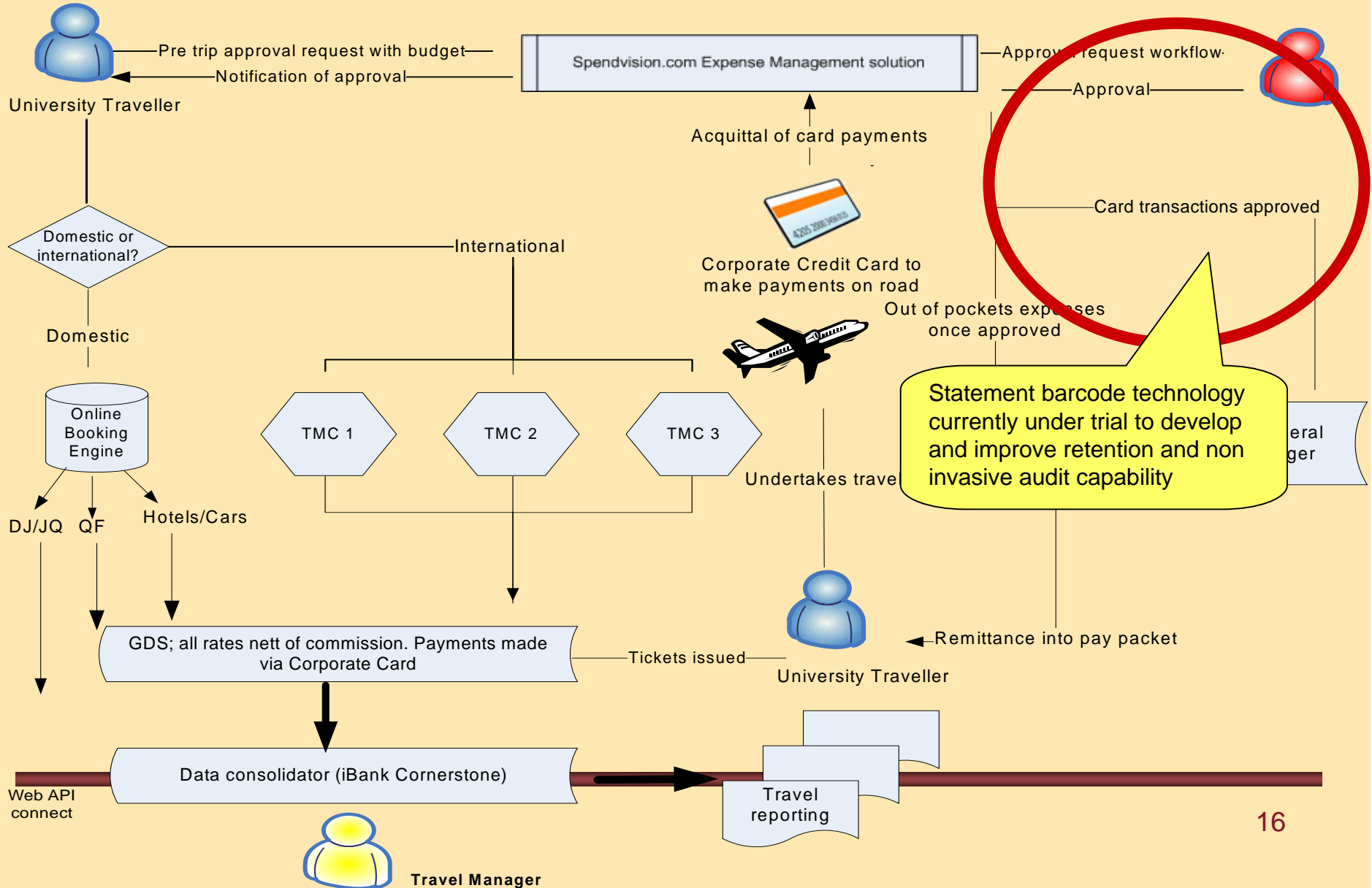














## Online travel booking example



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Hotel Search

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Where you are:

Search

Select

Itinerary & Book

Finish

## Build A Trip

Please make your selection from the following flights by clicking on the price of the flight you wish to select. Prices in **GREEN** are those that match your compliance policy, those in **RED** do not.

## Select Flights Sector By Sector

### SYDNEY - ADELAIDE

Departing flights		Sunday 06 Aug 2006	Prices shown below are in AUD				
	VIRGIN BLUE [DJ]	Sun 08:35 AM	Blue Saver	Fair Fare	Flexi Saver	Fully Flexible	Blue Plus
	Sun 06:55 AM 06 Aug 2006 SYDNEY	06 Aug 2006 ADELAIDE	<b>\$ 121</b>	Not available	<b>\$ 247</b>	<b>\$ 264</b>	<b>\$ 289</b>
DJ402 Aircraft :							
	QANTAS[QF]	Sun 08:55 AM	Red e-deals	Super Saver	Flexi Saver	Fully Flexible	Business Class
	Sun 07:10 AM 06 Aug 2006 SYDNEY	06 Aug 2006 ADELAIDE	<b>\$ 161</b>	<b>\$ 192</b>	<b>\$ 318</b>	<b>\$ 412</b>	<b>\$ 614</b>
QF735 Aircraft : 73H							
	QANTAS[QF]	Sun 10:10 AM	Red e-deals	Super Saver	Flexi Saver	Fully Flexible	Business Class
	Sun 08:25 AM 06 Aug 2006 SYDNEY	06 Aug 2006 ADELAIDE	Not available	<b>\$ 221</b>	<b>\$ 318</b>	<b>\$ 412</b>	<b>\$ 614</b>
QF739 Aircraft : 73H							

Scroll down for more flights

### ADELAIDE - SYDNEY

Departing flights		Monday 07 Aug 2006	Prices shown below are in AUD				
QF740 Aircraft : 73H							
	VIRGIN BLUE [DJ]	Mon 11:25 AM					



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The tool provides a customised web based 'look and feel'

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Direct 'in your face' reminder regarding compliance' policy



**Management reporting is critical to success**



# Management system

## Monthly chart deck covering:

- Compliance
- Patterns/Projections
- Noise level
- Name and shame

### Pre Trip Reporting

**Spendvision**  
Budget and trip details

**Data Consolidator**  
TMC Booking reports

### In Transit

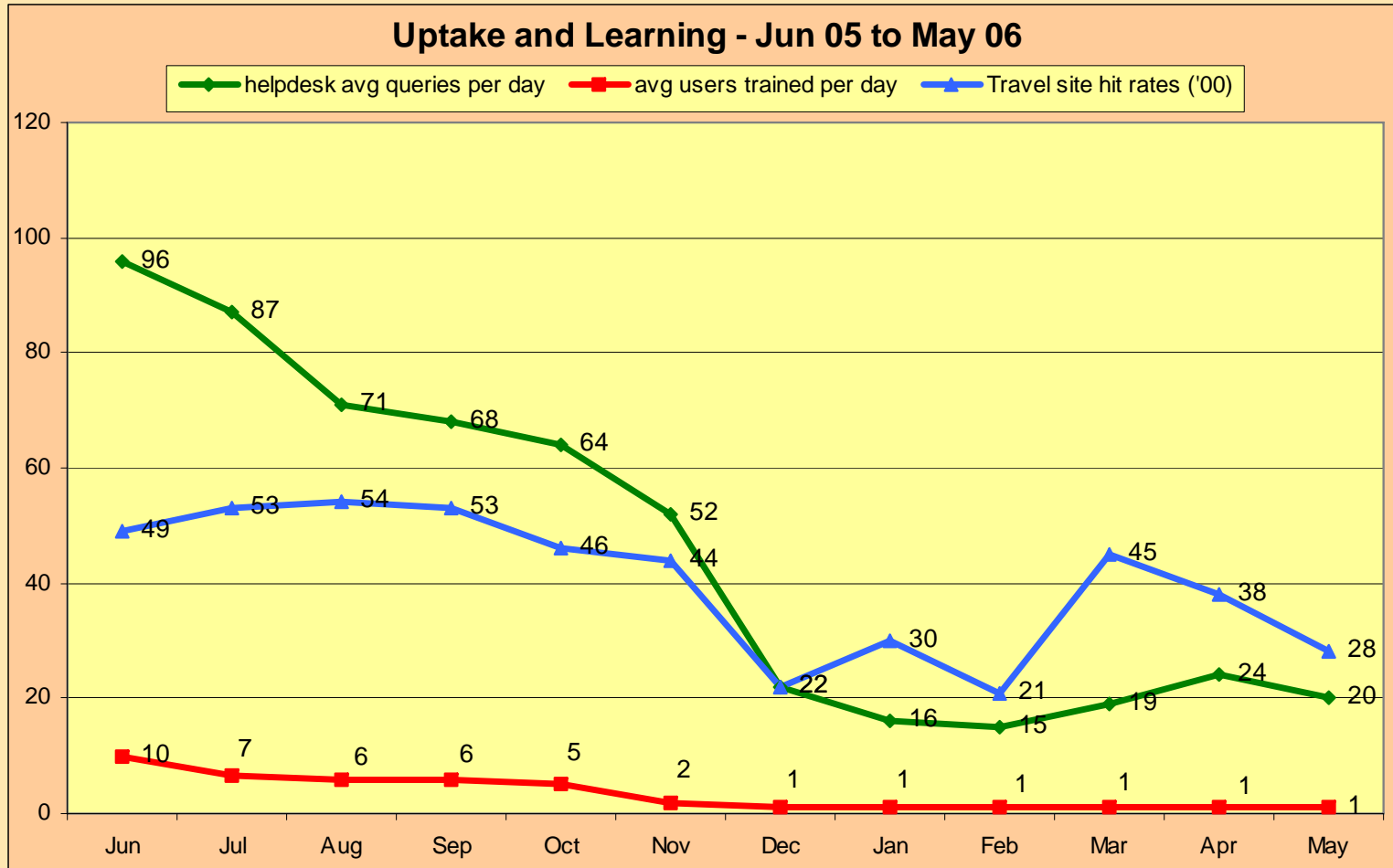
**Data consolidator**  
Real-time 24/7 locator  
Updated within 10 mins  
Broadcasts via SMS, email

### Post Trip

**Spendvision**  
**Data consolidator**  
**TMC financials**



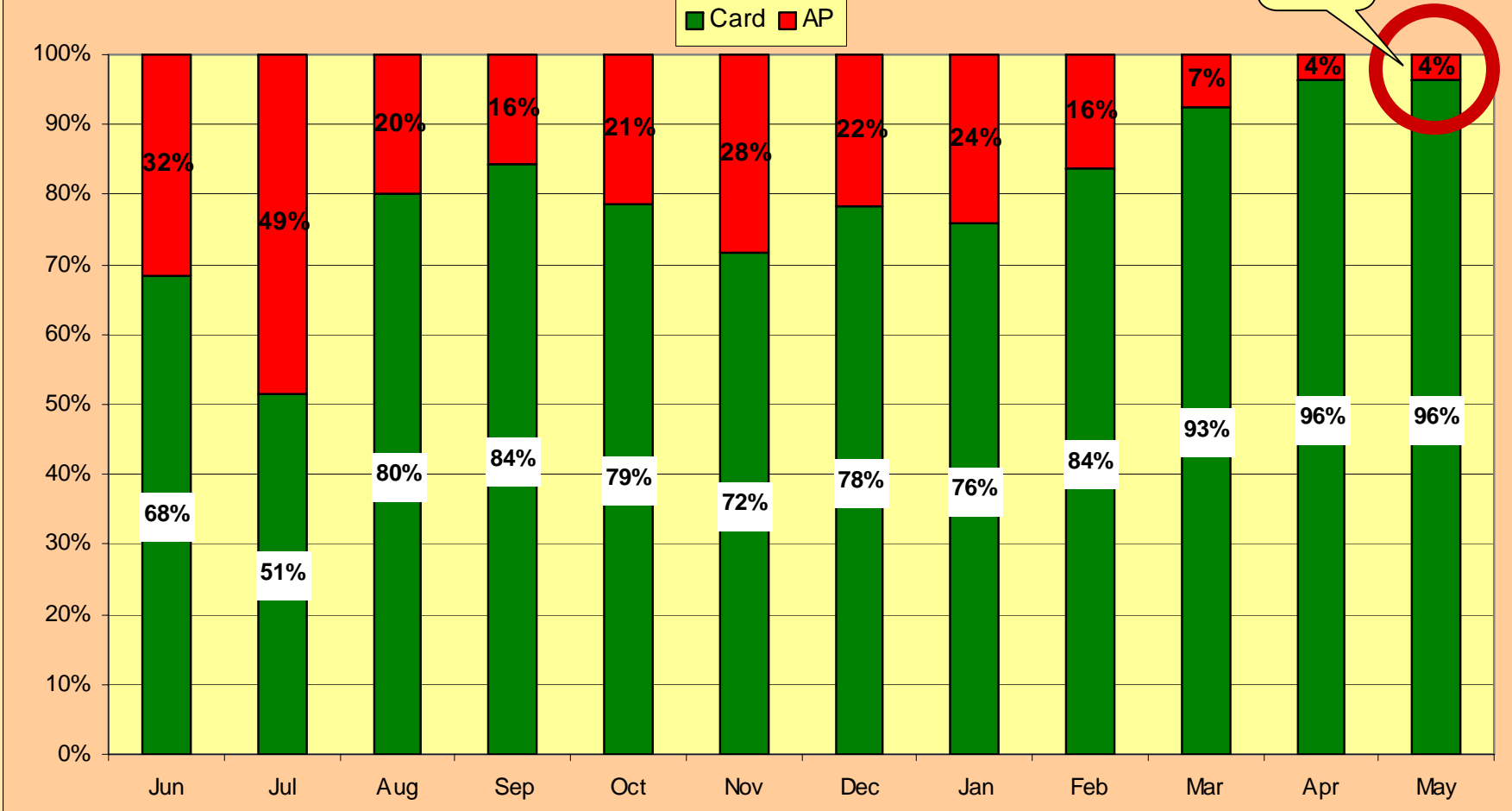
## Management reporting: sample charts



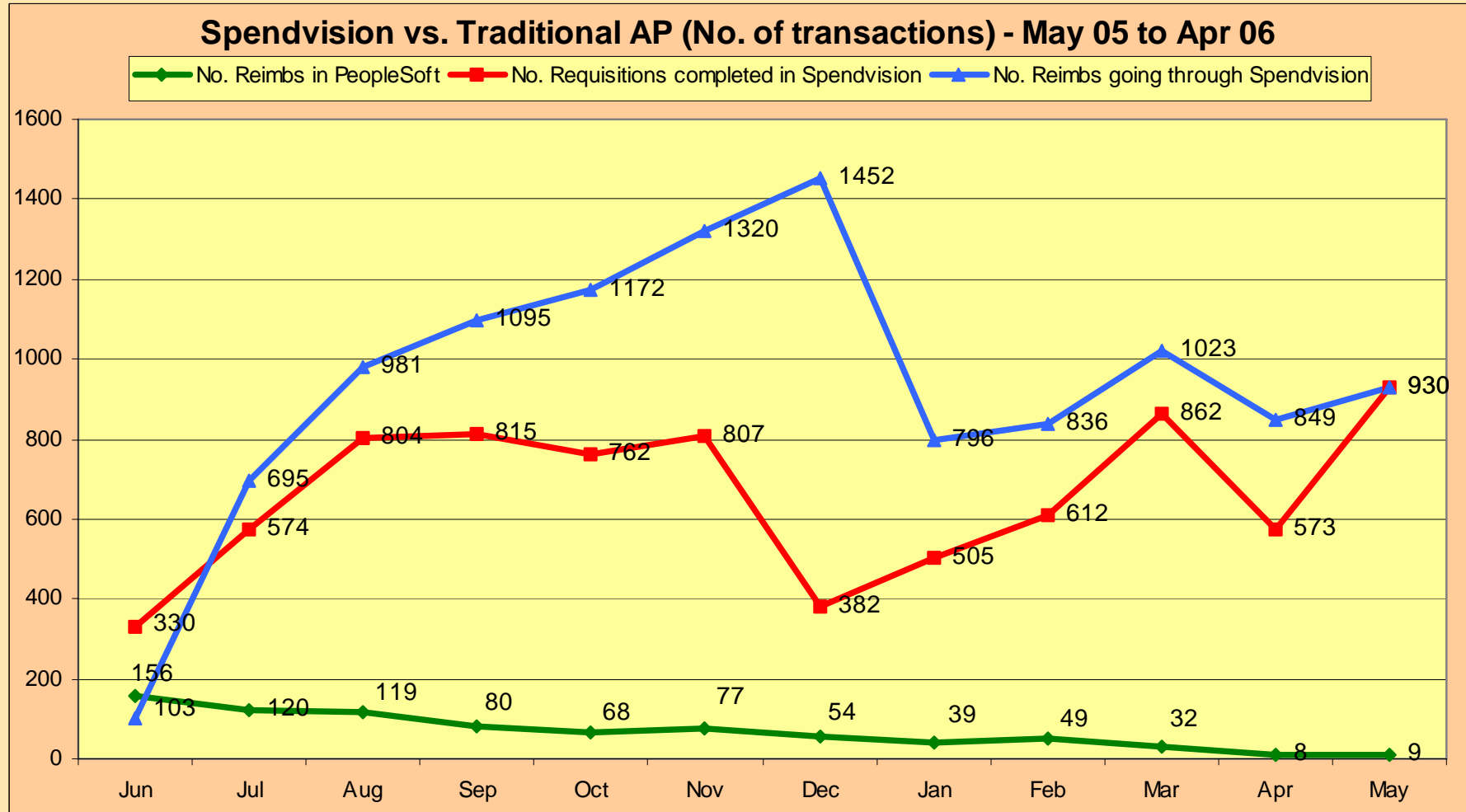
- 'Noise' and change management requirements stabilising, proceeding with distributed learning and refresher training
- Refresher training run in-unit: SCM, Dubbo, Engineering



Method of Payment - May 05 to Apr 06

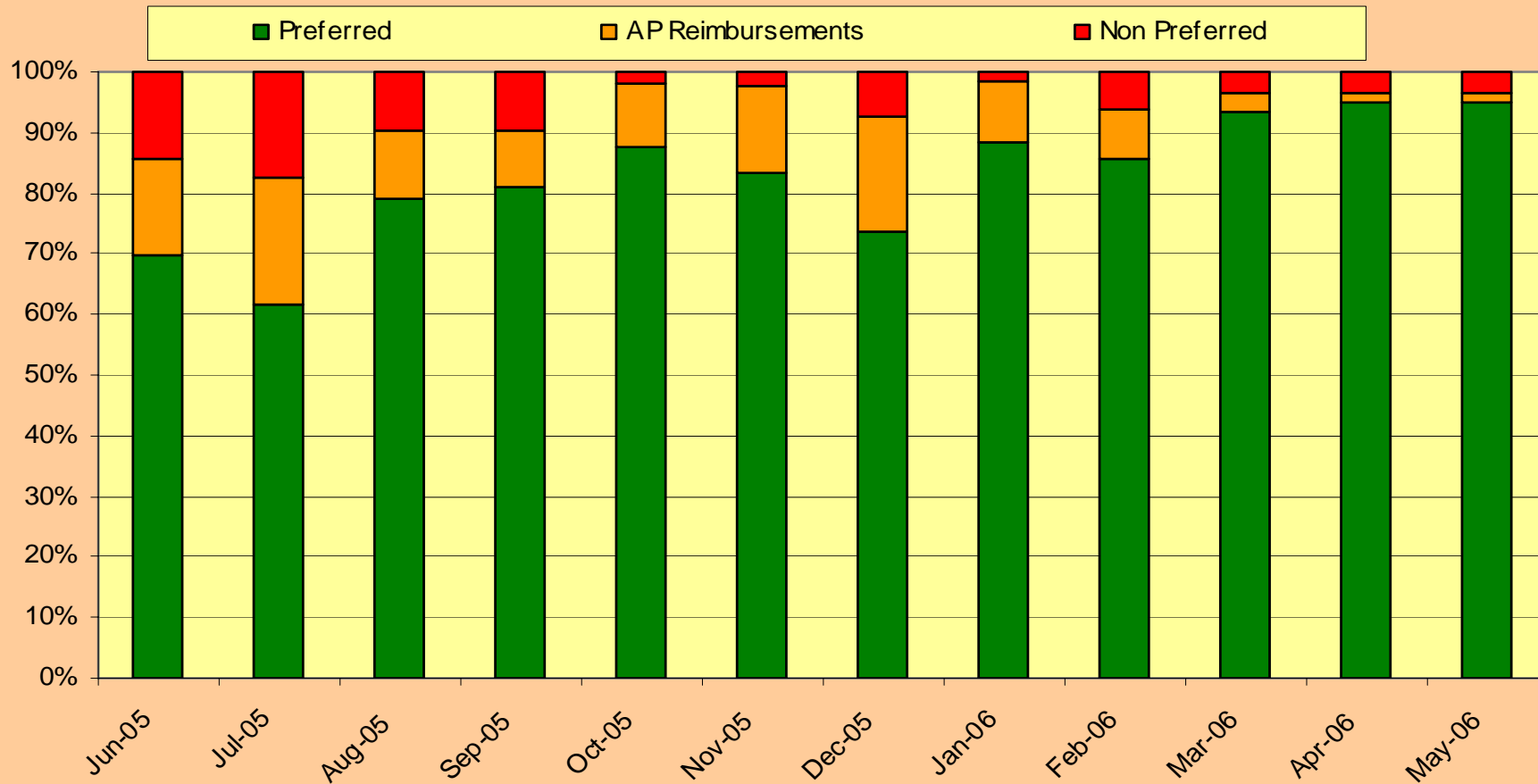


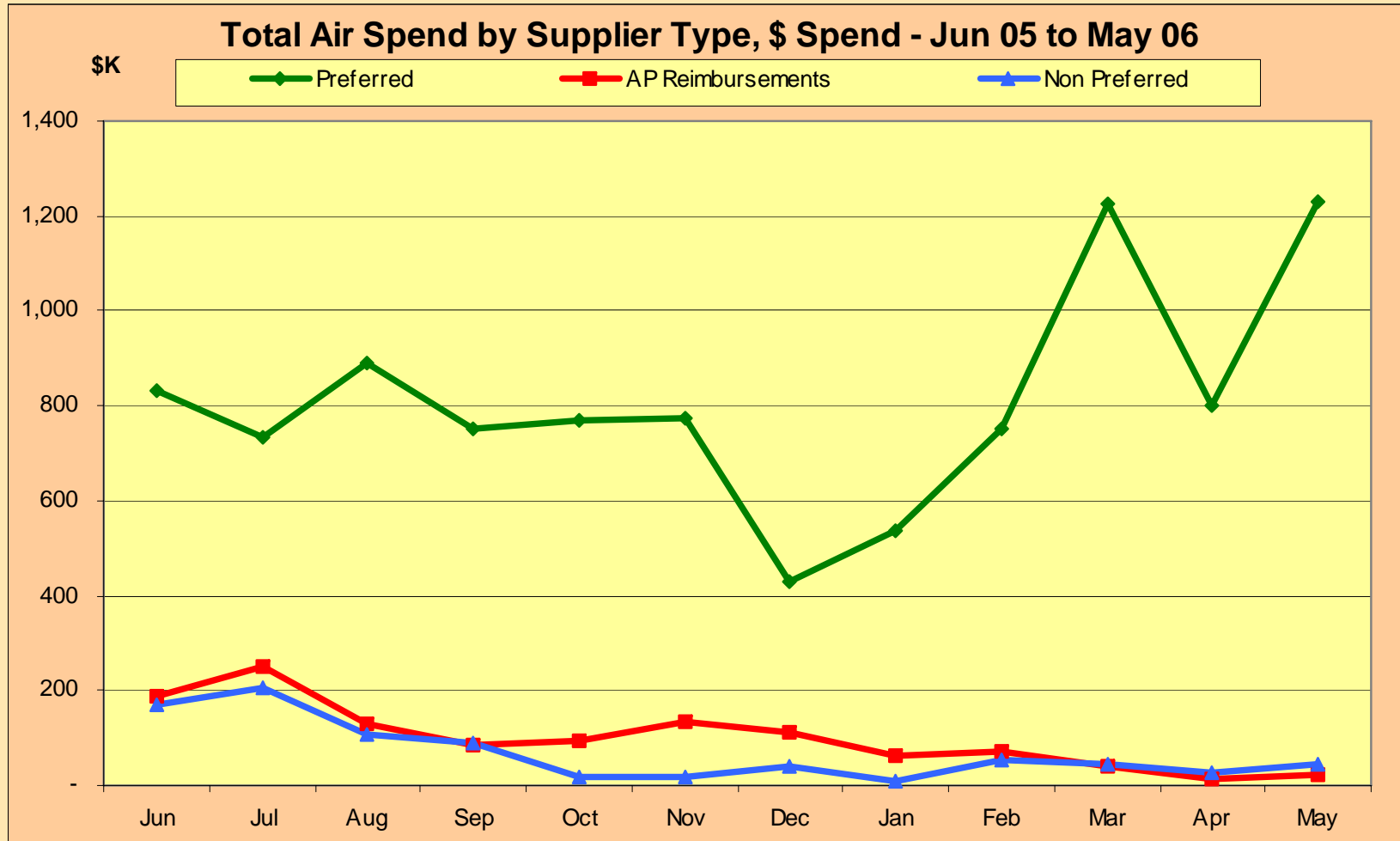
'Noise' factor



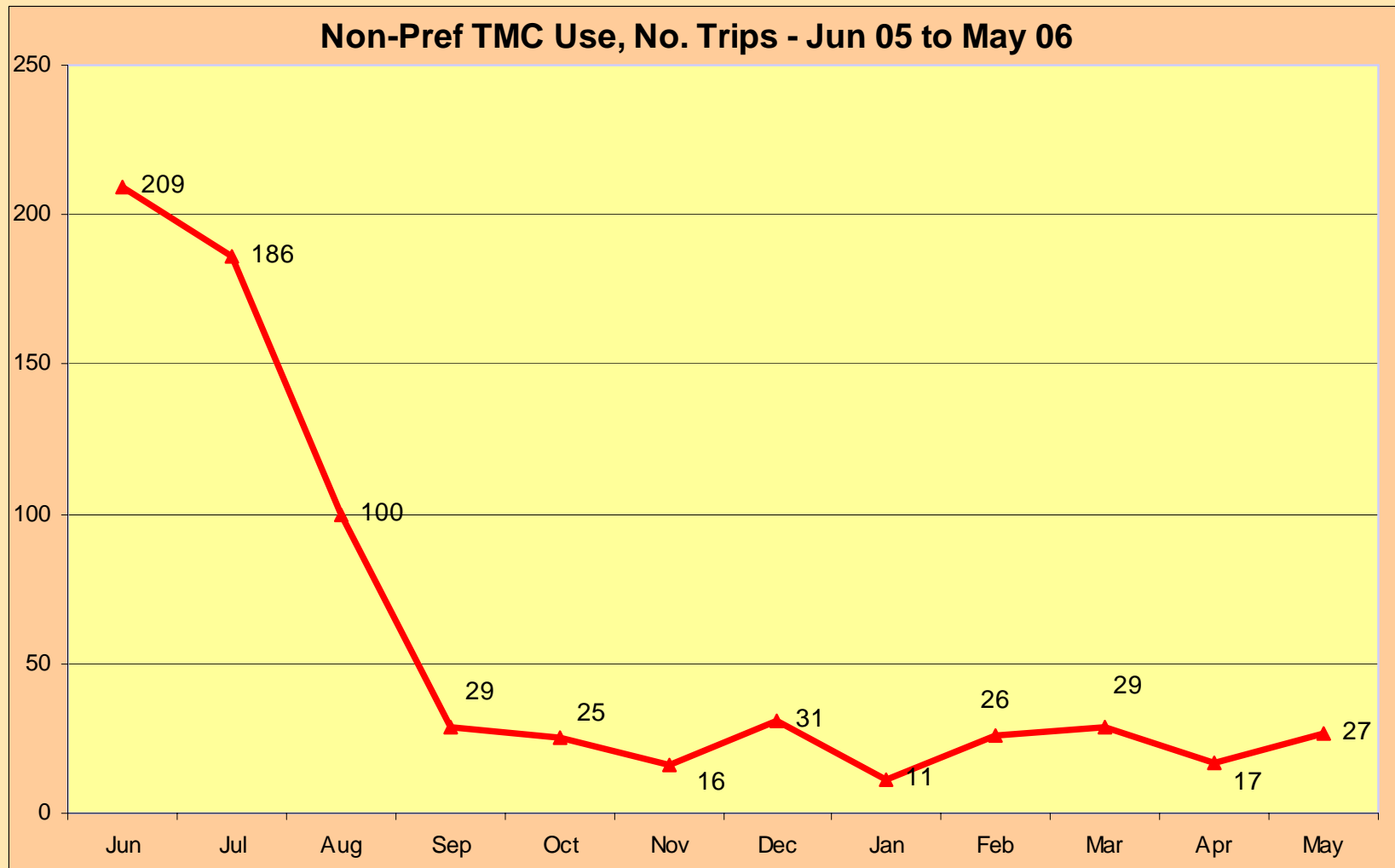


Total Air Spend by Supplier Type, % of \$





• Projected spend increase of 6% for next 3 months (min) due to fuel cost increases





## Personal observations regarding transformation



## Lessons learned from travel transformation

- Leadership is critical
- Develop a few key metrics to measure progress
- Identify strategies to change culture
- Involve all constituencies
- Identify ambassadors and assassins
- Look for ways to innovate
- The future is in front, not behind
- Get help



Questions?