

PURPOSEFUL TRAVEL MODEL



**FESTIVE
ROAD** 

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INTRODUCTION

BACKGROUND

In late 2020, in between lockdowns, we were legally, logistically and safely able to bring together eleven leading travel managers and industry experts to discuss the future of business travel in a 1.5 day event and process we called **MACROSCOPE “Live”**.

The theme of the event, ‘Big Thinking to Create Next Generation Business Travel’, provided an opportunity for the first face-to-face meeting that many of us had had in months and ultimately acted as a foundation for the development of our Purposeful Travel Model.

“Discomfort is a catalyst for growth. It forces us to change, stretch and adapt.”

Peter McWilliams,
American Self-Help
Author

We believe that 2021 marks “The Era of Purposeful Travel”. A significant step change in the way we manage travel. A focus on travel as an investment vs. a cost. This era will change our focus from an

operational, strategic and governance standpoint and may initially feel uncomfortable. But discomfort is a catalyst for growth. It forces us to change, stretch and adapt.



In order to move to this way of thinking, travel managers have a unique opportunity to determine the types of travel, which are valuable to their organisation. To start from scratch, looking forward, not backward to truly understand their company's appetite and demand for travel and to really get to grips with the WHY.

We want you to come on this journey with us and are now taking our MACROSCOPE "LIVE" process to all stakeholders across the industry. As with everything we do at FESTIVE ROAD, we want you to challenge us, to tell us where we have it right...and where we don't. Our model will be available to the entire industry and we will adapt it as we continue to receive feedback. We hope it supports you to keep having great discussions with your leadership.

But first things first, we want to challenge your thinking! In the first part of this framework, we share the external stimuli we used to get our MACROSCOPE attendees in the right head space and to get the creative juices flowing. Prepare to be challenged in a process that will inspire big ideas and future thinking around what's possible.

Buckle up, (make yourself a cup of tea), and get ready to join us on the journey to Purposeful Travel!



PURPOSEFUL TRAVEL: THE PROCESS

THE ROAD TO PURPOSEFUL TRAVEL



STEP 1

Review of external stimuli:
Challenge your thinking



STEP 2

'Old' vs. 'New' way of thinking
- which are you?



STEP 3

Zoom vs. In the Room - where
does the value lie for you?



STEP 4

Create Executive
Summary



YOU'RE HERE! INTRODUCTION
PURPOSEFUL TRAVEL: THE PROCESS

STEP 1

REVIEW OF EXTERNAL STIMULUS

To ensure everyone entered the MACROSCOPE LIVE event with the same level of knowledge, we shared a pack of pre-read/watch information designed to stimulate ideas and spark creative thinking. The majority of contributors were from outside of the travel industry but have a depth of knowledge in their chosen subject area. These included HR, an Academic, a Behavioural Scientist, a Procurement Professional and a Next Generation Employee.

Before you begin the Purposeful Travel Model, we strongly recommend that you review our blog posts summarising this material. As well as driving new and fresh ideas, it will also give you a significant amount of input to share with your executive leadership team around the future of travel. You may wish to use this as supporting evidence for your purposeful travel approach in your Executive Summary.



**Purposeful Travel Blog Series Part 1**

<https://www.festive-road.com/purposeful-travel-external-stimulus-part-1-of-3/>

**Purposeful Travel Blog Series Part 2**

<https://www.festive-road.com/purposeful-travel-external-stimulus-part-2-of-3/>

**Purposeful Travel Blog Series Part 3**

<https://www.festive-road.com/purposeful-travel-external-stimulus-part-3-of-3/>

While you are reading, we encourage you to think about things that surprise you, things you agree with, things you disagree with and anything you have heard from outside of the travel industry that could influence your future thinking.

We hope you enjoy it as much as we did!



STEP 2

CHALLENGE YOUR THINKING

Now that you have reviewed the external stimulus summaries, you are almost ready to begin working through the Purposeful Travel Model. One last thing before you jump in...

There are a lot of 'universally held truths' in our industry, which have been challenged in the past 12 months. We encourage you to challenge any old way of thinking and to look forward with us.

Use the next diagram to assess how you feel about travel, personally and professionally. Is it a perk or a privilege? Are you the first to jump on a plane and do you expect the same of others? Have you adopted a more sustainable mindset, in line with your organisation? Or are your personal values at odds with those of your company?



ARE YOU READY TO COME ON THE JOURNEY?

Old thinking vs. New thinking – which are you?

OLD WAY OF THINKING

Travel as a perk of the job/
status symbol/indicator of
'busyness'.

Travel first/jump on a plane
mentality.

Travel as a company
expectation - employee
doesn't have a choice -
part of the role.

Limited consideration to
the impact on the planet.

Travel as a P&L line/cost
centre.

NEW WAY OF THINKING

Travel with a purpose –
personally & professionally.

Virtual first, continual
assessment of demand.

Swing in balance of power –
employee wellbeing and
acknowledgement of life
outside of work.

Sustainability now at the
core of many organisations.

Travel as an investment.



THE ROAD WARRIOR VIEW

Consider the following statements from former Road Warriors – how confident are you that you know how YOUR travellers feel about travel?

“We (and all the Big 4) have had no issues at all doing due diligence remotely. Once a deal is underway, this last year has proved that most aspects of transactions can be managed with people all over the place including cross border. However, I don't think that holds equally with deal sourcing. A lot of that is built upon relationships that can't be started via emails or zoom calls. So, I fully expect corporate finance houses to be out and about as soon as they can, looking to get in front of shareholders and boards of directors for the chance to take those businesses to market. Similarly, I expect private equity bods to be both looking to form acquaintances with future target businesses and also getting time with investors for fund raising. So, in summary, a deal process itself can be wholly run online but it's the aspects that involve strong relationship building ahead of getting to that point where I fully expect it to revert back to actual face to face physical meetings.”

M&A Director, "Big 4" Professional Services Firm

“I think there are lots of people who enjoyed the travel, for sure. I certainly did. But I've not really missed it and I've realized how excessive it was at 30% of my time. I can't imagine there's anyone who feels like they want to get back to lots of time in airports, planes, taxis and offices any time soon. I think we may have been addicted to the high life and frequent flyer points and we've had to go cold turkey. And the addiction is cured, for me at least. When I think of the environmental impact and how much money we were spending I feel quite shocked. Not to mention the fact that I haven't had any kind of illness in the past 12 months. I used to get 3 – 4 colds per year and I was always tired!”

D&I Director, large global FMCG Organisation

“My colleagues and I are itching to get back to travel. I noticed a distinct difference in my ability to work with a new person I hadn't met from Southern Europe. What was missing? Cues and social norms –the social connection, it was hard to read the room – or person via Zoom! Despite this, I think we will think differently in the future – I will be pushing back on returning to pre-2020 levels of travel.”

Chris, Senior Director, Global Pharmaceutical Organisation



"I was very much of the opinion that you have to travel and have face to face meetings to be effective. However the great leveller that has been the last 12 months have shown otherwise. I think as everyone is used to using VC for home and work that has helped massively and we have a great set of tools to support what we do! From a personal point of view, I miss being on the ground, and in the air, and the sense of adventure and getting to know somewhere. And from a business point of view, demonstrating I understand and have first-hand knowledge of the market. But I don't miss the ridiculously early starts / late homes, stop offs in Schiphol and Duesseldorf!"

Ben, Retailer

"I have realised how much conferences and larger groups bring me creative and physical energy to my work, I've really missed it. At the same time, I had planned to reduce the amount of travel I was doing to drive better wellbeing and sustainability, so I feel I have a chance to re-set to get the best out of travel when personal and company purpose are aligned."

Managing Partner, Consultancy Business

"I've gone from travelling once a week to no flights in 48 weeks. I'm sleeping better and generally feel more settled. The last 20 years I have lived 'on the edge' with long-haul flights, getting up early and back late, missed out on catching up with friends etc. It's only when I stopped that I could relax properly and see friends again. I don't think I will ever go back to the way I was."

Charlotte, Singapore



STEP 3

ZOOM VS. IN THE ROOM



Having reviewed the external stimulus and challenged your thinking, you are now ready to start working through the dynamic part of the Purposeful Travel Model. Congratulations!



Our listening to key travel buyers about their programme tells us that business travel should be defined by more than internal/external travel, it's more nuanced than that. At FESTIVE ROAD we believe that it can be split into one of three categories: **Organisation, Customer and People.**

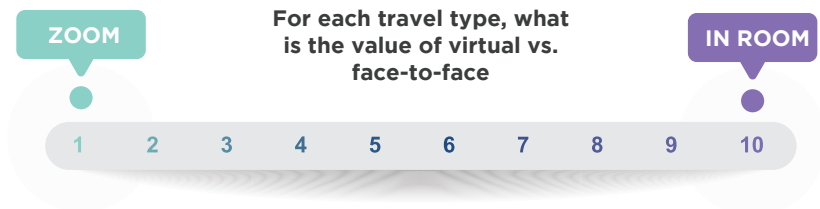
In the following section, you will see how we have added subcategories to the above and stated their value. We believe that we have captured just about every type of trip there is, but please let us know if you find something that is missing.

In this first step, we ask you to investigate all the reasons that people in your company travel and to think about those interactions that are vital to the running of your organisation. Rate the importance of each travel reason and assess its value to your company.

Please note, this is likely not an exercise that you can do by yourself. You will need the input of your stakeholders and key travellers to get a full picture. Crucially, your organisation may use different terms to those above and in the following pages. We have deliberately used generic terms such as 'customer' for ease of understanding but make sure that you match the language to that of your company. This will form the Zoom vs. In The Room results section of your Executive Summary.



HOW TO APPROACH THE PROCESS - HINTS AND TIPS



- ▶ Start by reviewing the FESTIVE ROAD travel categories and subcategories (there are 22 in total) on pages 19-27. Then match the travel that you do in your organisation, from department to department and then holistically.
- ▶ Arrange meetings with department heads to validate why they travel and why each type of trip has a value. What did the past 12 months teach them about the kind of trips that are essential vs. those that can now be done virtually? (see the three key questions on the next page, which will form the basis for a great conversation).
- ▶ Consider creating a survey for your top travellers asking them the same questions in order to understand the sentiment across the board.



► It is important to acknowledge that no organisation operates as an island. There are many variables that will influence the importance of each trip type.

► Once you have rated the importance of each trip type for YOUR organisation, consider the lenses on page 16, which you may need to apply based on your company culture, your clients and your competitors, each of which will play an important role in your decision making.

THE THREE QUESTIONS TO ASK **STAKEHOLDERS**

To assist you in defining the travel types that are important to your organisation, you need to validate this with internal stakeholders e.g., budget holders, department leaders and top travellers. The following questions can be used to get this feedback and the answers will form the 'Internal Stakeholder Feedback' section of the Executive Summary.

1. Tell us about a time when business travel has been invaluable to you and your department?

2. Tell us what has surprised you and your team about working virtually? What have been the benefits and what habits will you choose to keep?

3. Travel has an impact on your personal time, on budget and on the environment. When the ability to travel returns, how will you choose to invest in travel to drive the most value?



USE “THE LENSES”



Company Culture – on paper, some trips can clearly be replaced by Zoom however if this would significantly rail against your company culture, then reconsider how you classify the trip. For example, if your company typically kicks off a new project with an in-person meeting, which sparks the creative process and leaves everyone involved feeling highly motivated, this may not be achieved in a virtual environment.

Competitor-analysis – you may be able to reduce travel significantly as an organisation. However, if your competitors take the opposite approach and, as a result, are out there in front of new prospects promoting their brand, yours could suffer.



Client expectations – how would your clients feel if you switched 50% of QBRs to virtual? Perhaps they would be relieved. Perhaps it would have a serious impact on your relationship. Consider this before you make any decisions. The sentiment across these three areas are likely to change as we enter the ‘next normal’ so be sure to revisit them periodically.



TRAVEL TYPES

Now you are ready to complete the Zoom vs. In The Room exercise, you will walk through each of the travel types and assess the real value to your organisation as a whole. The following pages describe the types of travel that fall under the umbrellas of **‘Organisational, Customer and People travel’**. Trips that are important to the day to day running of a business.

Following the last year’s events, some of these may now be completely ‘Zoom-worthy’ in your organisation. For others, in person travel may be absolutely critical and to switch these to virtual would pose a high degree of risk, either financially or otherwise.

What do we want you to do? Review each of the trip types and assess their value to your organisation. Score their value from 0 – 10, whereby:

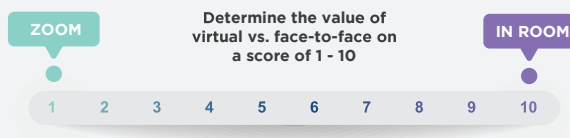
0-3 = Very low value in face to face meeting could be conducted virtually

4-6 = Some value in face to face, depends on the situation

7-10 = High value, in most circumstances, travel is required to achieve the meeting objectives

ZOOM VS. IN THE ROOM

PART 1: ORGANISATION



1.1 REGULATORY

EXAMPLE SCENARIO

- ▶ License to operate
- ▶ Governance
- ▶ Planned audit
- ▶ Government relations

POTENTIAL VALUE

- ▶ Legal/regulatory requirement
- ▶ Context is important to understanding of a situation
- ▶ Gain access to information otherwise unavailable

1.2 SUPPLY CHAIN ASSURANCE

EXAMPLE SCENARIO

- ▶ Key supplier visit
- ▶ High risk category
- ▶ Audit required
- ▶ Crisis management
- ▶ Critical negotiations

POTENTIAL VALUE

Required to mitigate:

- ▶ Reputational risk
- ▶ Revenue impact
- ▶ Operational crisis
- ▶ Proactive ownership of strategic category suppliers to mitigate risk

1.3 PHYSICAL

EXAMPLE SCENARIO

- ▶ Asset shutdown
- ▶ Security assessment
- ▶ Health & Safety audit
- ▶ Critical equipment repair

POTENTIAL VALUE

- ▶ When someone or something else cannot be delivered locally or onsite



YOU'RE HERE! STEP 3 OUT OF 4

ZOOM VS. IN THE ROOM, PART 1: ORGANISATION

1.4 STRATEGIC PROJECT

EXAMPLE SCENARIO

- ▶ Project kick-off
- ▶ Establishment of new project team
- ▶ Project change / implementation
- ▶ Project workshop

POTENTIAL VALUE

- ▶ Speed
- ▶ Effectiveness
- ▶ Creative sparks!
- ▶ Impact of environment e.g., off-site vs. in office
- ▶ Tools – whiteboard / fluid debate
- ▶ Complexity
- ▶ Sell vs. tell culture i.e., when internal stakeholder buy in is needed before a project can proceed
- ▶ Project taking place in market where cultural expectation to meet face to face is strong

1.5 LEADERSHIP

EXAMPLE SCENARIO

- ▶ Offsite meeting
- ▶ Townhall meeting
- ▶ Shareholder meeting

POTENTIAL VALUE

- ▶ Optics – important for visibility of leadership
- ▶ Volume of attendees makes virtual meeting ineffective
- ▶ Decisions need to be made quickly

1.6 M&A

EXAMPLE SCENARIO

- ▶ Deal-sourcing
- ▶ Fund-raising

POTENTIAL VALUE

- ▶ Relationship building
- ▶ In person confirmation of due-diligence



PART 2: CUSTOMER (EXISTING)

2.1 REGULATORY

EXAMPLE SCENARIO

- ▶ Audit governance

POTENTIAL VALUE

- ▶ Contract governance – customer demand

2.2 CLIENT MANAGEMENT

EXAMPLE SCENARIO

- ▶ Executive meeting
- ▶ Strategic meeting
- ▶ Account Management
e.g. QBR
- ▶ Tactical meeting
- ▶ Negotiation

POTENTIAL VALUE

- ▶ Importance of executives being 'seen' to be involved
- ▶ Joint strategy development
- ▶ Business development – demonstration of new products and services

2.3 PHYSICAL

EXAMPLE SCENARIO

- ▶ Client delivery project
- ▶ Shop build out
- ▶ Construction
- ▶ Equipment repair

POTENTIAL VALUE

- ▶ Core business



2.4 CLIENT PROJECT

EXAMPLE SCENARIO

- ▶ Project kick-off
- ▶ Establishment of new project team
- ▶ Project change/implementation
- ▶ Project workshop

POTENTIAL VALUE

- ▶ Speed
- ▶ Effectiveness
- ▶ Creative sparks!
- ▶ Impact of environment e.g., impact of off-site vs. in office
- ▶ Tools – whiteboard/fluid debate
- ▶ Complexity
- ▶ Sell vs. tell culture i.e., when internal stakeholder buy in is needed before a project can proceed
- ▶ Project taking place in market where cultural expectation to meet face to face is strong

2.5 RELATIONSHIP BUILD

EXAMPLE SCENARIO

- ▶ Client events/Customer Advisory Board
- ▶ Hospitality

POTENTIAL VALUE

- ▶ Foster better relationships
- ▶ Client retention
- ▶ Perception of added value
- ▶ Link to marketing efforts



PART 2: CUSTOMER (BUSINESS DEVELOPMENT)

2.6 EXPANSION/DEVELOPMENT

EXAMPLE SCENARIO

- ▶ Introducing new product or service to an existing client
- ▶ RFP Avoidance

POTENTIAL VALUE

- ▶ Driven by client need
- ▶ Strategic development
- ▶ Discovery session
- ▶ Trust/social capital

2.7 EXPLORATORY

EXAMPLE SCENARIO

- ▶ Conference attendance
- ▶ Participation at Expo

POTENTIAL VALUE

- ▶ Impromptu leads/serendipitous encounters
- ▶ Efficiency all in one place – large number of prospects in one place
- ▶ Inside mind of prospect – chance encounters

2.8 PROSPECT

EXAMPLE SCENARIO

- ▶ Direct 1:1 meeting with high value prospect

POTENTIAL VALUE

- ▶ Client expectation of in person meeting
- ▶ Deal size - value
- ▶ Competitor will be conducting business in person



2.9 CLIENT PROSPECT

EXAMPLE SCENARIO

- ▶ Project kick-off
- ▶ Establishment of new project team
- ▶ Project change/implementation
- ▶ Project workshop

POTENTIAL VALUE

- ▶ Speed
- ▶ Effectiveness
- ▶ Creative sparks!
- ▶ Impact of environment
- ▶ Tools – whiteboard/fluid debate
- ▶ Complexity
- ▶ Sell vs. tell culture
- ▶ Project taking place in market where cultural expectation to meet face to face is strong

2.10 BRAND AWARENESS

EXAMPLE SCENARIO

- ▶ Event sponsorship
- ▶ Roadshow

POTENTIAL VALUE

- ▶ Look and feel/context and space
- ▶ Brand impact
- ▶ Attendee experience



PART 3: PEOPLE

3.1 ATTRACT

EXAMPLE SCENARIO

- ▶ Recruit/pre-employ
- ▶ Graduate

POTENTIAL VALUE

- ▶ Share the cultural norm's of the workplace
- ▶ Consider where most value lies - screening, interview or end of process
- ▶ Consider re-training staff if Zoom interviews become the norm'

3.2 DEVELOP

EXAMPLE SCENARIO

- ▶ Training
- ▶ Mentoring
- ▶ Career-Mapping

POTENTIAL VALUE

- ▶ Risk of disconnection and loss of social and intellectual capital without F2F
- ▶ Types of training & development:
 - ▶ Instructional - non-technical (how to) vs. technical (quality/health & safety)
 - ▶ Skills training - professional and managerial
 - ▶ Mentoring - soft skills and workplace navigation
 - ▶ Career mapping - testing individual in range of situations
 - ▶ Team training - build and foster team culture
 - ▶ Face to face time with leadership - as reward and recognition



3.3 MOTIVATE

EXAMPLE SCENARIO

- ▶ Incentive
- ▶ Team-building
- ▶ Community
- ▶ Events - Sales kick off

"More than 50% of CEOs and CFOs say corporate culture influences productivity, creativity, profitability, firm value and growth rates"
Forbes

POTENTIAL VALUE

- ▶ Social capital - relationship building and trust building amongst peers - build networks for quick problem solving
- ▶ Serendipitous encounters! The power of an impromptu coffee and designing something on the back of a napkin!
- ▶ The power of 'environment' to spark creativity
- ▶ Creating a joint vision - linking individual/team goals to company goals

3.4 PEOPLE MANAGEMENT

EXAMPLE SCENARIO

- ▶ Lay-offs
- ▶ Mobility/relocation/commute

POTENTIAL VALUE

- ▶ Dealing with issues sensitive in nature - redundancies/lay offs/firing - when miscommunication / misinformation cannot be risked
- ▶ Virtual could be used for non sensitive cases and where large numbers of individuals involved



3.5 DEPLOY/COLLABORATE

EXAMPLE SCENARIO

- ▶ Stakeholder engagements
- ▶ International presence

POTENTIAL VALUE

- ▶ Breakdown cultural barriers and avoid cultural sensitivities
- ▶ Where culturally, business is done face to face and relationship building is explicitly expected

3.6 GUESTS/SPEAKERS

EXAMPLE SCENARIO

- ▶ Events
- ▶ Broader learning
- ▶ Cross-industry learnings

POTENTIAL VALUE

- ▶ Importance of broader learning/ understanding to organisation and its employees
- ▶ Greater efficiency and access to bigger speakers otherwise unobtainable
- ▶ Where face to face is very important to avoid miscommunication e.g., feedback in a clinical trial/customer focus group



STEP 4

YOUR PURPOSEFUL TRAVEL MODEL

Now that you have done the hard work, it is time to document what purposeful travel means to your organisation. This will likely require sign off by your senior executives. At this point, you can bring everything together to create your Executive Summary, which should be no longer than 3 slides and should contain the following sections:

- ▶ The Internal View – the results of the three questions you asked your stakeholders...
- ▶ Zoom vs. In The Room Results – the scores for each type of travel
- ▶ What Next – your Purposeful Travel statement

This will demonstrate that you have applied critical thinking to the process. You will need to reassure your leadership that you will own the downstream impact this move to purposeful travel will have on your people, policy, tools and how you track and measure moving forward. Finally, at this point, tell your leadership what YOU need from THEM. Executive sponsorship is a must and if that person can put their name to your employee communications as a sign of support, all the better.





EXECUTIVE SUMMARY

- ☐ The Internal View – the results of the three questions you asked your stakeholders...
- ☐ Zoom vs. In The Room Results – the scores for each type of travel
- ☐ What Next? – your Purposeful Travel statement



EXAMPLE REPRESENTATION OF YOUR ZOOM VS. IN THE ROOM RESULTS

1-4 DIVERT TO ZOOM 4-7 VP APPROVAL 7-10 LINE MANAGER APPROVAL

DIVERT TO ZOOM

1 2 3 4 5 6 7 8 9 10

CATEGORY: **ORGANISATION** TRAVEL TYPE: **REGULATORY**

VP APPROVAL

1 2 3 4 5 6 7 8 9 10

CATEGORY: **CUSTOMER (EXISTING)** TRAVEL TYPE: **CLIENT PROJECT**

LINE MANAGER APPROVAL

1 2 3 4 5 6 7 8 9 10

CATEGORY: **PEOPLE** TRAVEL TYPE: **MOTIVATE**

VP APPROVAL

1 2 3 4 5 6 7 8 9 10

CATEGORY: **ORGANISATION** TRAVEL TYPE: **STRATEGIC PROJECT**

LINE MANAGER APPROVAL

1 2 3 4 5 6 7 8 9 10

CATEGORY: **CUSTOMER (NEW BIZ)** TRAVEL TYPE: **EXPLORATORY**

DIVERT TO ZOOM

1 2 3 4 5 6 7 8 9 10

CATEGORY: **PEOPLE** TRAVEL TYPE: **PEOPLE MANAGEMENT**

YOU GOT THERE! WELL DONE!

You are now at the end of the Purposeful Travel Model. Congratulations on finishing – this was an important piece of ‘deep-work’ for both you and your organisation. We hope it generated some big thinking and led to great conversations!

As a reminder, here’s what you achieved:

- ▶ You solicited input from top travellers and business leaders around the internal view of travel in your organisation
- ▶ You went through a “Zoom vs. In The Room” exercise and categorised the travel types, which will be valuable to your organisation ongoing
- ▶ Unknowing, you have likely aligned your travel programme to your company objectives and culture, and re-set your travel for the decade ahead

What Next?

We would love to hear what you think. If you’d like to share your feedback and findings with us, or receive further updates as we develop the model, then please email us at hello@festive-road.com.

Thank you for joining us on this road to Purposeful Travel.



YOU'RE HERE!
YOU GOT THERE!



**The Consultancy On A Mission To Create Better
Travel & Meetings Management**

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Carrier Pigeon: FESTIVE ROAD (they'll know)

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