iNNOVATION@SCTEM

University of Colorado

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Our School

FOUR CAMPUSES, ONE UNIVERSITY

- 67,000 students among CU's four campuses

- 15,000 degrees awarded in 2015-16 fiscal year

- 5,200 tenured/tenure track faculty; 1,600 non tenure track instructors

- 34,000 faculty and staff; third largest employer in the state

- $3.55 billion budget

Travel Program

- 11,500 travelers annually
- Annual spend $38.7 Mil
  - Air = $16 Mil | Hotel= $15 Mil | Car Rental = $1.4 Mil
  - Transportation = $1.9 Mil | PO = $4.4 Mil
- TMC = Christopherson Business Travel
  - Seven dedicated Agents
- Concur Travel (May 2011); Concur Expense (March 2010)
- Airfare compliance rate = 93%
- Travel program staff: Assoc. VP & Chief Procurement Officer; Travel Director; Travel Manager; Travel Coordinator; (1 1/2) back-office Processors

Goals

- Continuously strive to improve the user's travel and expense experience

- Annual travel & expense survey to gauge satisfaction levels and opportunities for improvement

- Identify pain points and work to alleviate them
  - System changes
  - Policy changes
  - New processes/programs

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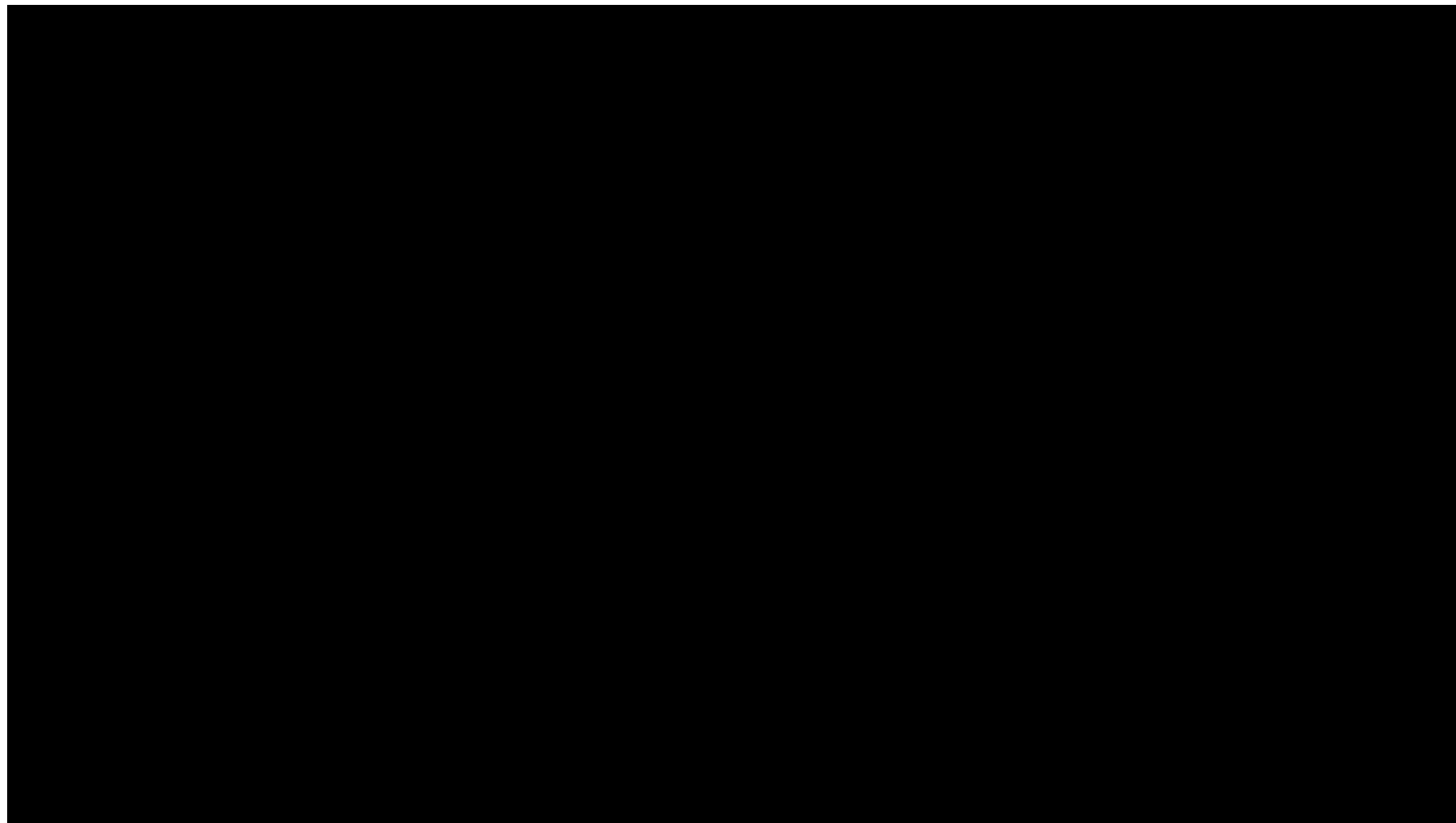
Challenge

- Travel comments from our survey
  - *"It's only easy for someone who uses the system frequently"*
  - *"Creating my expense report is confusing."*
  - *"The staff who only travel once or twice a year struggle in the system"*

- 1st Step – look at the data to understand and define an infrequent traveler
  - Baseline: *Active employee who has traveled 2 or less times per year for the last 3 fiscal years*
  - *65% of our travelers fall into the "infrequent traveler" category*
  - Implementation: Active employee who has not traveled in last 12 months

- Challenge was to assist new and infrequent travelers by providing information at the right time throughout the travel process – from booking to expense reporting to educate them on how to navigate the process

Solution

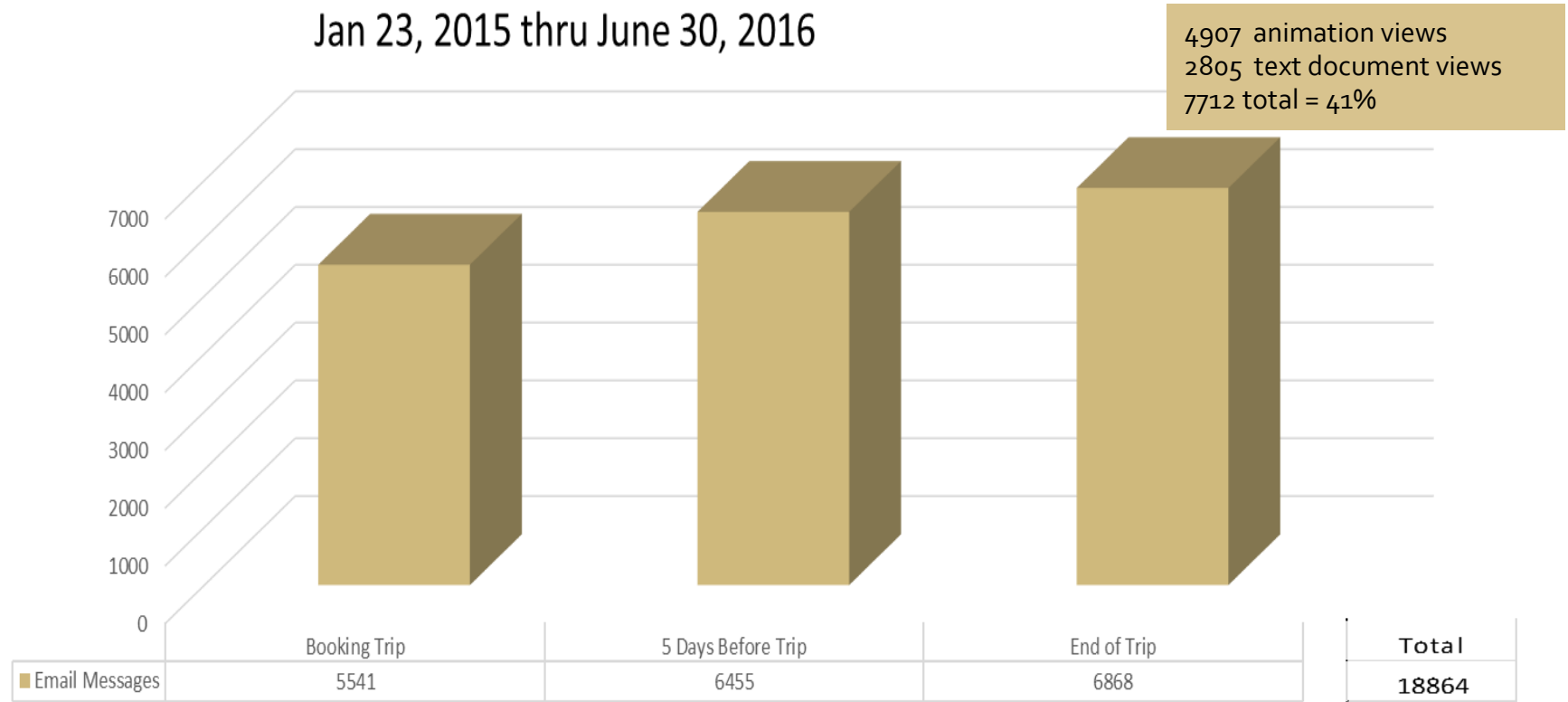**Launched Infrequent Traveler Messaging Program**

- Three-part email process that pushes information to infrequent & new travelers *when they start to travel*
    1. Upon booking your trip (preparing for your trip)
    2. 5-days prior to your trip (what you should know before you go)
    3. Upon trip completion (preparing your expense report)

- Series of email messages automatically sent if a traveler has not booked airfare in the last 12 months (animation or text)

- Idea originated through a brainstorming session
    - Use reporting capabilities of the Concur system to identify infrequent/new travelers and burst out the emails
    - Worked with Notre Dame on technical configuration

- Promote through news articles, town halls

Meet Kelsey – An Infrequent Traveler

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Results

Infrequent Traveler Email Messages
Jan 23, 2015 thru June 30, 2016

4907 animation views
2805 text document views
7712 total = 41%

	Booking Trip	5 Days Before Trip	End of Trip	Total
Email Messages	5541	6455	6868	18864

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Impact

- **Customer Service** – Ability to push out information based on different phases of the travel process
- **Continuous Improvement** – Work to improve the user experience and make improvements based on their feedback
- **Data Driven** – Data used to define an infrequent traveler, and data used to identify individuals to send the information to
- **Learning Styles** - Information available in both a visual format and a text document
- **Other "Burst Message" Applications** – Ability to use Concur's back-end reporting to burst out important information to additional types of travelers

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Tips for the Future

- Obtain feedback from your travelers to understand what they like about your program and to identify issues that your travelers struggle with

- Use data to drive system improvements and process efficiencies

- Take action and report back

- Think creatively to fully utilize the capability of your systems

- Continuously review travel policies, procedures, processes to improve the travel experience