



# Comprehensive **Business Travel Planning Guide**

**Vital Resource for Assistants,  
Business Travelers and Planners**

By

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Frequent Traveler and Former Executive Assistant*



## Welcome Traveler or Executive Assistant or Business Traveler Planner!

For 20 years, as an assistant, I arranged hundreds of trips for the numerous executives I supported. These trips ranged from very simple one day trips to complex international flights with multiple meetings in several countries. I thought I understood how hard travel could be on the traveler, but I did not fully grasp the complexity of traveling and the stress for the traveler until I began traveling on a regular basis after I started my business, Office Dynamics, in 1990.

While I do not travel out of the country extensively (by choice), I find that travel, in general, since 9/11 has become a chore. The good old days are definitely gone. And it is zanier than ever for those executives, like me, who travel on a regular basis. Unless a person travels frequently, with a variety of demanding schedules, a person cannot really fathom the stress placed upon a traveler.

I have been coaching executives and assistants for more than 23 years. Travel is always a part of our conversations. Every executive I have talked to wishes his or her assistant would do a better job in that arena. These coaching sessions were situations where the assistant had worked with the executive for years and, sometimes, utilized a travel agency. These were not novice assistants.

This document is the result of one such coaching session. Personally, I thought the executive assistant did an outstanding job of preparing for the executive's travel and kept an extremely informative agenda and travel folder for her executive who frequently traveled internationally. These were big trips she was planning. However, the executive's perception was different. So I dug deep to think of what was missing; took into consideration my tools of the trade for traveling and personal needs; plus my executive assistant's check lists and forms. I made a list of what was missing from the executive assistant's protocol.

Voila! The Comprehensive Business Travel Planning Checklist.

You may not need to consider all the items listed in this document so take what is most useful to you. I highly encourage you to clarify your executive's expectations. Discuss some of these ideas with your executive to see if any would be of interest to your executive. Look for those little things that you might not be considering that would be important to your executive.

This guide is written in very simple, basic terms. It is not meant to read like a book, but rather a list of things to consider, questions to ask and information to gather.

Enjoy and good luck!



**Joan Burge**  
Founder and CEO  
Office Dynamics International

## Travel Planning Considerations

### **In Addition To The Assistant's (Or Travel Planner's) Typical Travel Protocol, Consider The Following When Booking Commercial Flights:**

- ✈ Layover time – should not be too long but must be long enough for your executive to walk through the concourses and make the connecting flights. Some concourses are longer than others. For example, the concourses at Chicago O'Hare are much longer than the concourse at the Lansing, Michigan airport. Winter weather conditions can have an affect - if the connecting flight is late due to storms or severe rain, you may need to ensure you allowed enough layover time due to a later arrival.
- ✈ Is this the best time of day for the executive to depart from their local airport based on when the executive needs to arrive at their destination?
- ✈ Is this the fastest route? Sometimes it is better to wait at the airport for a later direct flight than to take an earlier flight with connections.
- ✈ Is upgraded seating available? Can you use frequent flyer miles or what is the fee to upgrade? How soon before the flight's departure can you check for availability? How many hours before your executive's flight will you or the executive be notified that they are cleared for first class? (These days you can often request text notification.) On longer flights, such as those which are three hours or longer, it is extremely beneficial to sit in first class to be able to spread out to get work done; not to mention the other benefits like good food!
- ✈ What other benefits does your executive have with the airlines or that are part of the executive's frequent flyer status level? Provide the traveler a concourse map at the connecting airport, clearly highlighting where their airline frequent flyer status lounge is located so they can rest or get work done while they wait.

- ✈ Many airports have “fast line” status through security so that travelers who’ve obtained pre-check with TSA can go through on a separate line. Some airlines grant fast check to their frequent flyers. There are private companies (“Clear”) that process security clearance cards.
  
- ✈ While travel agencies are helpful, they are not perfect. So you need to think about the following:
  - How can you more effectively work with the travel agency to find the most efficient way to structure your executive’s travel given all factors of each trip, i.e., time frames, travel dates, meetings with customers, dinners, time to and from airports, expense, lodging, etc.?
  - Ask about other options that better suit your executive’s requests.
  - Do your own research regarding available flight(s) and then speak to the travel agent.
  - Have you thought through the schedule the travel agency gave you? Once the schedule has been identified, mentally “walk” the entire trip as if you were the traveler—does it make sense?

### **What Meetings, Luncheons, Or Dinners Should Be Scheduled?**

(Always think: What, Who, When, Where)

- ✈ Team Dinner?
  - Who needs to be invited?
  - Restaurant, club or other venue?
  - Any special communications from you to the team?
  - Time?
  - Celebrations (work service anniversary, birthday, life event)?
- ✈ Town Hall Meetings?
- ✈ Customer Meetings?
- ✈ Business Colleagues?
- ✈ Other?
- ✈ Is there heavy email traffic for your traveler from someone in the destination city? If so, ask your traveler if scheduling a meal with that individual might be efficient.

**Restaurant Information:**

Restaurant Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Website: \_\_\_\_\_

Dress Code: \_\_\_\_\_

Type of Meal: \_\_\_\_\_

Guests Attending: \_\_\_\_\_

Date Confirmed: \_\_\_\_\_

Confirmation #: \_\_\_\_\_

Special food requirements: \_\_\_\_\_

Other special requests: \_\_\_\_\_

Walking distance from hotel? How many blocks? \_\_\_\_\_

If not, mode of transportation? \_\_\_\_\_

Parking lot on site or street parking? \_\_\_\_\_

**Hotel Information/Sleeping Accommodations:**

Name: \_\_\_\_\_

Phone #: \_\_\_\_\_

Address: \_\_\_\_\_

Website: \_\_\_\_\_

Confirmation #: \_\_\_\_\_

Cancellation policy: \_\_\_\_\_

Non-smoking room: \_\_\_\_\_

Room type: King or 2 Queens/2 Doubles \_\_\_\_\_

Room rate: \$ \_\_\_\_\_ plus taxes: \$ \_\_\_\_\_ Other? \$ \_\_\_\_\_

**Room Preferences**

- ✈ Prefer room be located away from the elevators and very end of hallway?
- ✈ Does your executive prefer certain floors (lower vs. higher in case she has to exit for fire or other emergency)?
- ✈ Internet Service
  - Free
  - Charge at \$ \_\_\_\_\_ per day (or 24 period)
- ✈ Concierge Floor available? Hours of operation \_\_\_\_\_
  - Requested?
  - Yes \_\_\_\_\_
  - No \_\_\_\_\_
- ✈ Hotel shuttle service available? Within how many miles? \_\_\_\_\_

**Exercise Facility**

- ✈ Located in the hotel
  - Where/what floor in the hotel?
  - Hours of operation?
- ✈ Reciprocal club near hotel?
  - If yes, what is the name of the club? \_\_\_\_\_
  - Hours of operation? \_\_\_\_\_

**Pool**

- ✈ Indoor \_\_\_\_\_
  - ✈ Outdoor \_\_\_\_\_ ; months outdoor pool is open: \_\_\_\_\_
- 

**Restaurant(s) In The Hotel**

- ✈ Full-service restaurant(s):
  - Latest they serve dinner: \_\_\_\_\_
- ✈ Café only:
  - Hours of operation: \_\_\_\_\_
- ✈ Room Service 24/7?
- ✈ Onsite Business Center? (shipping packages, facsimile, printers).  
Include phone number to Business Center and contact person there.

Restaurants Within Walking Distance (full-service/fine dining vs. casual):

 Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Hours of Operation: \_\_\_\_\_

 Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Hours of Operation: \_\_\_\_\_

 Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Hours of Operation: \_\_\_\_\_

**Nearest Pharmacy:**

 Name: \_\_\_\_\_  
Phone #: \_\_\_\_\_  
Hours: \_\_\_\_\_

Emergency Medical Information for International Travel: provide details

**In Addition To The Typical Flight And Hotel Accommodations' Information, The Travel Itinerary Should Include:**

- ✈ Weather report for each day in the arriving city and other cities your executive might be visiting during his or her trip.
- ✈ Any issues or events in arriving city that could affect your executive's travel into the city or when your executive departs the city. (This is especially important when traveling into and out of big convention cities like Las Vegas, NV, Houston, TX, and Orlando, FL.)
- ✈ Is there a main contact who will be assisting your executive? What is their cell phone number (for emergencies or in-transit arrival delays or changes)?
- ✈ At the very top of the first page of the itinerary, have a noticeable box with ALL contacts' names and telephone numbers. Your executive should not have to hunt through the itinerary to locate these if he or she needs them quickly. Or, if using a tri-fold travel itinerary as I do, these numbers should all appear on the inside right cover.
- ✈ Frequent Flyer Club Information – locations of clubs at the various airport(s) your executive is traveling from, to or through for a connection. A concourse map is helpful, too!
- ✈ Will food be served during the flight? If so, is it a snack or meal? Is there a charge for the snack or meal?
- ✈ Remember to provide two copies of the itinerary package – one for the traveler and one to leave home so the family can reach him or her.



**When Traveling, The Traveler Should Leave  
The Following Items Home:**

- ✈ Copy of their travel itinerary (and other important information)
- ✈ International trips:
- ✈ Copy of passport (photo and visa pages)
- ✈ Credit cards your executive typically carries in his or her wallet and will not need to use during the trip

**Meeting Materials:**

- ✈ Agenda
- ✈ Executive's notes, folders, files (soft or hard copies)
- ✈ Handouts and other documents
- ✈ PowerPoint slides (saved to USB?)
- ✈ Other: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Cash For Travel:**

Make sure your executive has cash a few days before departing for the trip. Tip money is always necessary. Ask your executive about his or her preferences for a breakdown of denominations. An example is:

\$1.00	10
\$5.00	6
\$10.00	6
\$20.00	5
\$50.00	4
\$100.00	2

Does your executive want Traveler's Cheques? If so, how much and in what denominations? For international trips, ATMs at the arrival airport can dispense currency – but remember their ATM card!

## Suggested Items For Traveler To Pack:

**NOTE:** It would be a good idea to create a separate check list with only these items on them for the traveler to use each time they pack for a trip.

- ✈ Cell phone
- ✈ Cell phone charger (or Universal charger)
- ✈ Laptop (and carrying case)
- ✈ iPad (and carrying case)
- ✈ Spare batteries
- ✈ Flashlight — for emergency/power outages at hotel due to storms
- ✈ Plug adapters and voltage converters
- ✈ Over coat
- ✈ Trench coat
- ✈ Umbrella
- ✈ Sunglasses
- ✈ Casual attire
- ✈ Business attire
- ✈ Workout attire (including tennis shoes and sport socks)
- ✈ Swimsuit
- ✈ Business suit or sports jacket
- ✈ Tie(s)
- ✈ Toiletries (place in appropriate baggies if taking a carry-on suitcase)
- ✈ Personal items
- ✈ Medical items:
  - Prescription medications
  - Tylenol
  - Throat lozenges
  - Advil
  - Sinus medicine
- ✈ ID
- ✈ Passport
- ✈ Boarding Pass
- ✈ Business cards
- ✈ Pens and/or special notepads or portfolio for writing

**NOTE:** Carry-On Baggage Although there is no regulation for common items such as clothing, reading materials, cameras and laptop computers, the TSA regulates the number of liquid items, such as toothpaste, shampoo and bottled water, permitted in carry-on luggage. Travelers must pack their liquid items in a single, clear quart-size bag. Each item in the bag must be in a 3.4-oz. or smaller container. Airline passengers can also take small scissors, those with a 4-inch or shorter blade and tools that are 7 inches or shorter with them on the plane, although larger tools are prohibited. Check the TSA website for current restrictions, before travel.

## **Departing From Executive's Home On The First Day Of Travel:**

**Suggestion:** Use a town car service to the airport. They often are not much more than a taxi or parking at the airport for several days. Plus the drivers are very helpful with handling baggage and pulling up close to the airport departure area. (Be sure to schedule the return pickup for the executive unless a family member will pick them up.)

Allow sufficient time get to airport. Are certain days busier at the executive's hometown airport than others, such as Monday? What times of day are busiest for driving to the airport?

## **At The Arriving City:**

**Town Car Service:** If using a town car service, where is the driver meeting your executive?

- At the bottom of the airport escalators?
- At baggage claim?
- Curbside?

Does your executive need to call the driver upon his or her arrival?

Will the driver be holding a sign with your executive's name on it near baggage or at the baggage carousel? Or will the name card be placed in the car window for your executive to see at curbside? Get the driver's cell number and first name for your executive.

**Taxi:** Where are the taxis located? Is there a taxi booth or does your executive just step outside to the curb and wait for a taxi to pull up?

**Person:** Will an individual be picking up your executive from the airport? If so, provide all the details; especially their cell phone number.

**Car Rental:** Provide all the details for your executive.

Regardless of the mode of transportation, find out the travel time (not miles) from the airport to the destination (hotel or meeting venue): \_\_\_\_\_

**Transportation From The Hotel, To And From The Meeting Or Conference Venue/Each Day:**

- ✈ Date: \_\_\_\_\_
  
- ✈ How long does it take to get from where your executive's sleeping accommodations are located to the meeting or conference venue?  
\_\_\_\_\_
  
- ✈ Is it in walking distance? If yes, how long will it take? \_\_\_\_\_
  
- ✈ Does the hotel shuttle provide transportation? If yes, within how many miles? \_\_\_\_\_
  
- ✈ Mode of transportation: \_\_\_\_\_
  
- ✈ Time of departure from hotel: \_\_\_\_\_
  
- ✈ Who will be meeting your executive? \_\_\_\_\_  
*Provide the contact's phone number and email in case there is a snafu.*
  
- ✈ Exactly where will they meet your executive once your executive arrives?  
\_\_\_\_\_
  
- ✈ What time will they meet your executive? \_\_\_\_\_
  
- ✈ Will your executive have to go through any special security check or special badging? \_\_\_\_\_  
*(Make sure they remember to take photo identification!)*
  
- ✈ What is an emergency number of the contact, if needed?  
( ) \_\_\_\_\_





### **Joan Burge**

*Founder and CEO*

*Office Dynamics International*

*Administrative Visionary and Expert*

**Joan Burge** is known as the red-lipstick-wearing “Rock Star” of administrative and executive assistant training and a successful entrepreneur who created a unique business niche by founding a movement to help administrators see themselves as professionals so they could excel in business.

Joan is an accomplished author, writer, speaker, consultant and corporate trainer after 23+ years of hard work, dedication, and sheer “*No is not an option*” attitude.

In 1990, she created a business in an untapped niche, overcoming monumental obstacles involving corporations’ and managers’ attitudes, prejudices and stereotypes about executive assistants and administrative professionals. She dedicated herself to inspiring excellence and encouraging administrative professionals to reach for the stars! Her company, Office Dynamics International, is a global industry leader which offers a broad range of solutions and providing high-performance, sophisticated executive and administrative assistant training and coaching.

One thing is clear: Executive assistants, their executives, HR business partners, administrators and managers have come to rely on Office Dynamics International, because “only Joan is Joan.” Joan Burge is an original; the foremost expert in the demanding field of management support. She put in the hard work and high investment required to earn the reputational excellence and uncompromising trust of leaders in business. She illuminates through her empowering teaching, building better work relationships between executives and their assistants.

Joan’s never-ending quest to provide top-notch educational programs has earned the respect of premier clients like Cisco Systems, AT&T, Kindred Healthcare, The Boeing Co., Humana Inc., Sunoco, Nokia, Procter & Gamble, Nationwide Insurance, and Chevron.

Joan is best known for her highly-acclaimed Star Achievement Series® course which promotes “Star Performance” among executive assistants and administrative staff. This flagship training program has inspired thousands of administrative professionals to achieve excellence.

She is the creator and host of the *Annual Conference for Administrative Excellence™* (started in 1993); the *World Class Assistant™* Certification course; *Mastering Exceptional Self-Leadership* Certification course; and more than 40 customized workshops and seminars for executive and administrative assistants. She created several educational video series for assistants including *26 Weeks to Administrative Excellence*, *Reality Check*, *Adminology™* and *Now Is the Time*.

Joan has authored four groundbreaking books for administrative professionals including the 2012 hot new release and Amazon Best Seller - *Who Took My Pen ... Again? Secrets from Dynamic Executive Assistants*. Her administrative-career “bibles” entitled *Become an Inner Circle Assistant* and *Underneath It All* continue to be favorites among executive and administrative assistants worldwide.

She is a member of the American Society for Training & Development, National Speakers Association Las Vegas Chapter, Society for Human Resource Management, and Las Vegas Chamber of Commerce.

**Office Dynamics International** is the first administrative-dedicated training and development company whose CEO’s credentials include:

- A wealth of hands-on experience and specialized knowledge gained through 20 years administrative experience.
- A rare perspective having worked on *both sides* of the desk; including 20 years in the administrative profession and more than 20 years as an executive.
- Designing superb training through premier coaching and educational products (books, workbooks, videos, webinars, blogs, CDs, DVDs) and conferences.
- Wowing audiences across the country with her no-nonsense brand of wisdom, wit and expertise as a seasoned, highly sought-after professional speaker who relates to younger career workers and experienced professionals alike.
- Working side-by-side with executives and assistants daily. Joan is still in the trenches, relating, guiding, listening to, and inspiring administrative professionals and their leaders every day! Joan Burge is on-site, in small and big offices spanning a wide spectrum of industries, seeing first-hand the challenges, obstacles, and opportunities for success.

