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CUSP Submission Helps Infrequent Travelers [1]

May 3, 2015 by normandy.roden [2]

Combine data, creativity, and technology to drive communications … and you can transform customer service. That's what Mary Martin's team did this year. Learn how:

As Director of Payment Services and Travel at the Procurement Service Center (PSC), Mary often heard that individuals who travel infrequently on University business found both the travel process and the Concur Travel & Expense System confusing. A search to improve the customer experience began with a look at the data, which revealed that two-thirds of all CU travelers had traveled only two (or fewer) times per year for the last three fiscal years. Adding to the situation was the continual stream of new employees entering CU and its travel policies and systems.

- The challenge was clear: how to assist infrequent and new travelers by providing the right information at the right time throughout the travel process, from booking an airline ticket to submitting an expense report?
- The answer was the creation of "infrequent Traveler Messages," a series of three concise emails sent to travelers who had not booked airfare within the last 12 months. The messages are triggered by specific traveler activity (e.g., booking airfare through Concur/Christopherson Business Travel). They offer the recipient a choice of viewing an animation or reading a text document to obtain just-in-time travel information.

Response from travelers has been highly favorable, with one-third of all recipients to date taking the time to click through and review the linked information.

In addition to Mary, the team included Sandy Hicks, Kelly Richter, Sarah Rowe, and Betty Heimansohn (from the PSC) and Normandy Roden and Travis Chillemi (from the Office of University Controller).

Want to learn more about the Infrequent Traveler Messages? Check out Mary's submission [3] to the CU Shared Practices (CUSP) website.

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