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CUSP (CU I&E) Submission: Infrequent Traveler Messaging [1]

Description

The Travel Program hears from University travelers through a variety of ways, such as the annual travel survey and through day-to-day interactions. A common theme communicated is the travel process and the Concur system is confusing for individuals who only travel occasionally. It was clear that someone who travels infrequently struggles with the travel process and the Concur system.

Even though it felt like there was a large population of infrequent travelers, we knew the first step was to look at the data to validate the number of infrequent travelers and to determine if it would be worthwhile to develop a process to assist them. Through data analysis, an infrequent traveler was defined as an active employee who has traveled two or less times per year for the last three fiscal years. The data revealed that 66% of travelers in the CU program fall into the infrequent traveler category. In addition, we realized that the infrequent traveler population is further compounded by an ongoing influx of new employees coming into the system. Once it was confirmed there were a large number of travelers struggling with the system, the challenge became how can we assist the new and infrequent traveler by providing information at the right time throughout the travel process, from booking airfare to completing the expense report?

The training challenge was solved through the development of the “Infrequent Traveler Messages”. The messages consist of a three-part email process that pushes information to the infrequent traveler when they start the travel process. The series of email messages is automatically sent if a traveler has not booked airfare in the last twelve months. The infrequent traveler has the option to view an animation with information about the travel process or read a text document with information. The trigger for the first message is based upon an approved/booked airfare itinerary, and it highlights what should be done to prepare for a trip. The trigger for the second message is five days prior to the trip start date, and it highlights what you need to know before you go and during your travels. The trigger for the third message is the last day of your trip, and it provides guidance on preparing an expense report. The messages have been well received and are a feature topic at the PSC April town hall meetings.

How does this impact the University?

The Infrequent Traveler Messages have impacted the University in several positive ways:

• Customer Service – Through the development of customized information based on different phases of the travel process, the travel program is able to push information out to new and

infrequent travelers when the information is most important and meaningful to them – when they are engaged in the travel process.
• Continuous Improvement – Emphasizes to our internal customers that we listen to their feedback and work to continuously improve the user experience by making improvements/changes to the University travel program and the Concur system.
• Data Driven – The process is data driven. Data was used to define an infrequent traveler, and Concur Cognos Intelligence data is used daily on the back end to identify new and infrequent travelers to send out the burst messages at the right time.
• Accommodate Different Learning Styles – The infrequent traveler messages were designed to accommodate different styles. For those who are visual learners, the infrequent traveler has the option to view an animation or to simply read a text document for those who prefer that style of learning.
• Innovative Concept – The “Infrequent Traveler” concept has been widely acclaimed by Concur and other Higher-Ed organizations. The University of Colorado is seen as a leader and innovator when it comes to the evolvement of our travel program. In fact, Concur was impressed by CU’s use of their reporting system to burst out messages in this manner.
• Other “Burst Message” Applications – The use of Concurs back-end reporting to burst out important information to a specific population of travelers/expense users can be developed for other applications.

Implementation Status

The Infrequent Traveler Messages went live on January 23, 2015. Through March 31, 2015, (4921) email messages have gone out. We have also determined, through PSC website analytics, that (996) individuals have viewed the animations and (621) individuals have viewed the text documents for a total of (1617) views. The number of individuals who have viewed the messages represents 33% of the messages that have gone out.

Submitter's Information

Submitter's Name: Mary Martin
Submitter's Email: mary.martin@cu.edu [2]
Additional Team Members: Sandy Hicks (Concept / Guidance), Kelly Richter (Data Analysis), Betty Heimansohn/Sarah Rowe (Concur back-end reporting/burst), Normandy Roden / Travis Chillemi (Animation Design)

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