

Diary Of A (Compliant) Time Traveller...



We often overlook just how much technological change has impacted our lives and affected our behaviours. The drive towards mobile, self-service, and easy accessibility to knowledge ‘on tap’ has permeated pretty much every aspect of our work and personal lives.

The area of travel is a great example of this. How we plan, book and experience our travel has changed markedly in recent years. With greater numbers of the global workforce being required to travel internationally for business more frequently, employers are keen to ensure that their employees have a positive end-to-end experience of company-requested travel. They also need to ensure that travel doesn't breach compliance rules for either their travellers or the corporate entity; internally, ensuring that travel policies are adhered to, and externally implementing compliance checks for employees alerting where business travel might trigger potential tax, social security or immigration exposure.

Employees themselves have a key role in this ever-changing picture too. Personal experience of social and commercial technology influences the expectations of corporate capability. It needs to be easy, it needs to be mobile and it needs to provide tangible value for the user.

To illustrate how these changes have affected business travel let's consider the personal experience of a fictional executive, Jo Dervan, Marketing Director at KippaxKlean based in

Middlesex, UK. Jo is excited about being asked to undertake a whistle-stop business trip visiting North, Central and South America. To really appreciate the difference however, we've slipped through a 'time portal' and can hear about Jo's contrasting experience as it happened ten years ago, and in the present day.

Over to you Jo...

"Right, I must get this business trip sorted... I'm looking forward to going back to the US again – feels like a home from home the amount of times I've been there this year! Will be nice to visit Atlanta this time though. Maybe I can catch up with Patti if time at the conference allows? She always know the best spots to eat..."

The most exciting thing about this trip though is that I am going to experience Costa Rica and Argentina too, both countries are on my 'bucket list' for travel. Okay, it is a work trip, but I should get a good feel for both places. Tick! Tick!

Two continents and three countries in 12 days is a big ask, and is going to be exhausting, but it can be done. So much work to pack in too, a number of important meetings, the conference in Atlanta and of course interviewing the final three candidates for the new Latin American marketing lead position."

As we can see from Jo's contrasting experiences on the next page, new technology continues to drive service and influence behaviour in the travel space, taking

what was once an often cumbersome, paper-based and manual process and enabling a much more structured, mobile, personal and self-sufficient traveller experience.

We are all familiar with how technology has revolutionised the booking and validation elements of air travel, as well as the sourcing of ancillary aspects such as accommodation and local transport; more freedom, more choice, more flexibility. If we examine Jo's experience in the present day, her Smartphone really supported the vast majority of her travel movements – from booking and paying for her taxi to the airport, checking-in for her flight, informing her of her flight status and scanning her boarding pass through security. No doubt it was also used for a few purchases in the airport shopping area too!

Before her day of departure, technology also supported numerous processes involved in the planning and booking of her trip. Moreover it supported her companies travel policy for managing business travel compliance. She recalled using a gamified on-line training resource to identify the steps in the process that she was required to be aware of, and also used on-line and mobile services to check her travel compliance and initiate workflows directly to KippaxKlean's tax and immigration service providers.

The compliance assessment that Jo undertook in just a few minutes was carried out on her phone and was computed using underlying immigration and tax logic. This logic, combined with the data the company held on Jo (nationality, home location,

2007

Planning

"I've spoken to my secretary Hazel and she is going to call the travel agency and sort out the bookings - this is going to be a bit complex - as well as booking my cabs to and from Heathrow. I know my passport is valid but she's also going to do some research on Visas. I think our travel provider do most of that, working with an immigration consultant. Or maybe it's HR who own it? Anyway, Hazel will find out I am sure! Better brush up on my conversational Spanish too... it is Spanish they speak in Costa Rica isn't it?"

Preparation

"Hazel is a diamond. She's booked all of my flights, quite a job, and printed out my flight details, receipts and an itinerary. Just got to keep all of this paper somewhere safe so I don't forget it when I travel.

Right, I remember HR emailed me about the immigration stuff... where is that email?! I can't remember who sent it. I'll get Hazel on the case again, she'll know.

So for the US I need an ESTA - I think I still have a valid one from my last trip there, I should update it for this latest trip, just need to double check. Who knows about the other countries though?

Anyway, I'm sure they'll advise me. I need to focus on these marketing strategy presentations...

Okay, after some lengthy back and forth with HR, and discussions, multiple emails and form filling with our immigration provider about when I am planning to go and what I am actually going to be doing in each country I think I am finally sorted on clearance for Costa Rica and Argentina. My head is spinning and I have more paper to carry with me, but better safe than sorry! They also clarified that I needed to update my ESTA for the US which I've now done.

It was a bit hairy there for a while and I wasn't sure whether I'd get all of my necessary immigration compliance done in time - I should probably have got the process started earlier. Lesson learned! I assume someone in HR is thinking about any tax issues?

I'm all set now: passport, tickets, itinerary, papers for Costa Rica and Argentina, work stuff all loaded on my laptop, adapter for the plane electricity socket, and print-outs for my first meeting.

Anything else? Oh of course my book! 'Harry Potter and the Deathly Hallows' which I just have to polish off..."

Travel

"Goodness the queues were massive at Heathrow, they really do need that new terminal! Waited ages, even though I am flying business class, before I could hand over my flight booking papers and get my boarding card printed. More queues at security as boarding cards and passports are checked, and then the usual crowds at the security scanners. Don't mind that though, I'm glad the airport staff are being thorough.

Right, after that ordeal I think I deserve a bit of retail therapy, then a quick G&T to settle my pre-flight nerves and a flick through the newspaper in the business lounge.

On-board the experience was great. Got a bit more work done while listening to my iPod and finished off my book - can't believe the Harry Potter series is over! Decent airline food, washed down with a nice crisp chardonnay, and even managed to catch the film 'Atonement' which I missed at the cinema and have been dying to see, followed by a bit of shut-eye. Americas here I come!"

2017

Planning

"I've given Hazel my EA my preferred travel dates and since I am working at home today she has IM'd me to let me know my flights have been provisionally booked online - she even thinks I can squeeze in a bit of downtime to explore Buenos Aires before I fly back which would be fab!

Now, what about immigration? I'm pretty sure I'm covered by my ESTA for the US, as I've been there three times this year already and I recall it being valid until the end of the year, but what about Costa Rica and Argentina?

I remember we had that online compliance training that employees had to undertake on the steps in the business travel processes. As training goes it was rather fun actually - more like a video game than training!"

Preparation

"So, I know I need to do my 'pre-travel assessment' for compliance on the Business Travel App on my Smartphone. It covers the whole trip, all I need to do is enter the trip dates and locations and the headings for the type of things I am going to be doing..."

Well, that was simple! The assessment was pretty much instantaneous.

On immigration I had an 'amber result' so something to do there. I simply initiated a workflow from the results screen and an immigration consultant called me to confirm the required actions. The consultant had all of my travel data and personal information from the App at hand so it was an easy conversation.

As I thought I was fine for the US leg with my existing ESTA, just needed to update it for my new flight and accommodation details.

For Cost Rica and Argentina there is a Visa Waiver scheme apparently, so I just needed to ensure I have proof of a return flight, accommodation, travel insurance and invitation letters from KippaxKlean Costa Rica and Argentina respectively. Hazel is making sure I have all of that.

Regarding tax compliance, seems I need to keep an eye on my days spent in the US, given my prior trips there this year. No issues at all in Argentina, but apparently my short stint in Costa Rica may be deemed taxable. Thankfully our HR and tax teams are sorting all of this for me - tax really isn't my thing!

Hazel confirms my flights and a short time later the flights appear in my Airline App on my phone. I'm all set!"

Travel

"Right, I checked-in online on the mobile Airline App last night, and moved myself to a window seat which will hopefully be a bit quieter. The flight was also showing as on time!

I ordered a taxi using my mobile app as soon as I was ready- I hate carrying too much cash and this way I pay directly through the app. Traffic wasn't great, but then some things never change.

I dropped my bag - no queue, love T5! - and scanned my boarding pass on my phone on the way through the automated security gates. I even had a bit of time for some browsing in the shops before heading to the executive lounge for a pre-flight glass of prosecco and a quick 'check-in' on social media.

On-board the experience was great. They had Wi-Fi so I got a couple of hours work in and cleared some emails, then plenty of time for relaxation - healthy eating option for me, though I allowed myself a couple of glasses of Malbec with dinner, well I do need to acclimatise for Argentina!

It seems I've already streamed most of the newer films they have on board, so I contented myself with catching up with a few episodes of Season 2 of 'Better Call Saul' which I've downloaded on my tablet, I'm addicted to it!

Then a brief snooze before I arrive in that Atlanta heat... I still get a buzz from business travel and can't wait to get going!"

passport, business travel history etc.), and the information she entered (dates and locations of her proposed travel, and the 'purpose of travel', selected from a simple pick-list of activities) – resulted in a real-time assessment.

It also enabled her employer, who has visibility to this assessment, as well as those for other company travellers, to be aware in advance of any potential compliance challenges and therefore any immediate or potential downstream actions required. Following the result of the assessment, at a touch of a button Jo was able to initiate a workflow to an immigration or HR representative for a quick telephone consultation. Alternative results would enable her to initiate an immigration case for a Business Visa or a Work Permit, or simply initiate the booking of her travel.

Contrast this to the experience in the other 'time zone' ten years earlier. If employers were focussed on the compliance aspects of business travel at all it involved numerous manual, or at best email-driven steps and required the traveller, or their trusty assistant, to navigate the myriad individuals involved in supporting the process.

It wasn't that organisations were less concerned about business travel compliance ten years ago, certainly not where immigration was concerned, but awareness of tax and social security exposures have historically been somewhat hazy, unquantified and crucially, often unowned within organisations (you wouldn't necessarily expect Jo to know anything about tax compliance, but she did question whether it had been addressed).

Additionally obtaining the data points required to make a considered assessment of immigration, tax and social security compliance would have been a significant challenge in itself for busy in-house HR or mobility teams. Data often being tracked in several diverse systems with data consequently being difficult to access, interrogate and aggregate.

As with Jo's shift from the plane's selection of available entertainment in 2007, to her wholly personalised entertainment on her own devices today, it has taken a paradigm shift in technology to enable these new data-based capabilities to free organisations and travellers alike from laborious manual processes with little audit capability.

One other important aspect in this 'time lapse' analysis are personal and societal changes. Yes, technology clearly plays a role in shaping what we do and how we do it, but a lot of this change also comes from evolving human behaviours, often driven by the generational influences that shape us.

We typically think of the millennial generation being at the forefront of this change, and there is certainly some truth in that – new ways of thinking, working and interacting have permeated the workplace as this generation first entered the workforce, and is now starting to take up senior positions. However, they are

not the only ones to embrace or benefit from it. By birth Jo is actually part of 'Generation X', but closely identifies as 'Generation C'. Generation C is not defined by the year of your birth, rather it is a mind-set meaning that anyone can be a member. Typically those within this profile like to be empowered by technology, have an on-line presence and are comfortable being 'connected' the majority of the time.

We saw from Jo's present day experience that she was very happy to use mobile technology services throughout. She communicated in numerous ways utilising various platforms – email, instant messenger, mobile Apps, social media etc. Her way of working is best described as agile; she worked in the office, at home, on the plane and probably in the cab and in the airport lounge too! This willingness to be available online and to continually interact reflects a change in our culture; technology is the enabler. Note also that Jo took time to relax on her journey which is hugely important. Frequent business travellers often have to show great physical and mental resilience, therefore management of mind and body is critical in attaining the right balance to support peak performance.

We've seen from Jo's 'time travel' experience how much has changed in the last ten years, and we can only wonder at the technological advances and innovations that will come along in the next decade.

As organisations deviate from traditional international deployment models to more fluid approaches to mobility, greater numbers of the global workforce will be required to move locations for short periods. Technology will continue to evolve and support remote inter-country virtual communications, which may well result in the rate of increase of business

travel tailing off a little over time. Regardless, for the foreseeable future business travel will continue unabated and technology will continue to enhance agility, improve employee experience and enable real-time compliance in this area.

We've seen from Jo's 'time travel' experience how much has changed in the last ten years, and we can only wonder at the technological advances and innovations that will come along in the next decade. Thousands of employees will be planning or taking their next business trip as you read this article, perhaps you are planning a trip yourself? Let's hope that they, and you, have as enriching and compliant a travel experience as Jo did!

If you would like more information on Deloitte's Business Travel Services, including Pre-Travel Assessment capability, Deloitte Passport (gamified business travel learning), or our wider Global Workforce offering please contact us.



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