

## WA7: Business Travel, Diary Systems, Meeting organization and event management

### 3.10 Organise business travel and accommodation arrangements

LO64: Demonstrate ability to prepare travel, accommodation requirements in conformity with budgetary procedures.

LO65: Demonstrate ability to book travel arrangements and accommodation as agreed with the traveller in conformity with budgetary procedures.

LO66: Demonstrate understanding of the necessity of checking the draft itinerary and schedule with the traveller before final booking.

LO67: Demonstrate ability to arrange credit and payment facilities for travellers in conformity with budgetary procedures.

LO68: Demonstrate ability to solve problems that may arise and, where necessary, refer issues to operational/financial managers.

LO69: Provide the traveller with an itinerary and required documents in good time and confirm with the traveller that itinerary and documents meet requirements.



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# Module Details



<b>Work Area Code:</b>	7
<b>Work area title:</b>	Business Travel, Diary Systems, Meeting organization and event management
<b>Unit Code:</b>	3.10
<b>Unit Title:</b>	Organise business travel and accommodation arrangements
<b>Learning Outcomes Ids:</b>	LO64, LO65, LO66, LO67, LO68, LO69
<b>Learning Outcomes titles:</b>	<ul style="list-style-type: none"><li>- Demonstrate ability to prepare travel, accommodation requirements in conformity with budgetary procedures. (LO64)</li><li>- Demonstrate ability to book travel arrangements and accommodation as agreed with the traveller in conformity with budgetary procedures. (LO65)</li><li>- Demonstrate understanding of the necessity of checking the draft itinerary and schedule with the traveller before final booking. (LO66)</li><li>- Demonstrate ability to arrange credit and payment facilities for travellers in conformity with budgetary procedures. (LO67)</li><li>- Demonstrate ability to solve problems that may arise and, where necessary, refer issues to operational/financial managers. (LO68)</li><li>- Provide the traveller with an itinerary and required documents in good time and confirm with the traveller that itinerary and documents meet requirements. (LO69)</li></ul>
<b>Recommended Duration:</b>	5,5 hours
<b>Trainer:</b>	



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In order for the Assistant /Secretary to successfully plan and arrange a business trip for the employee, it is necessary to collect all vital information.

## **GROUP DISCUSSION**

**What information do you need to collect?**



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- Who is travelling
  - When and where and he is traveling to
  - Why he is travelling
  - Special requirements
- 
- What to take into account when planning the trip – are there any company policies or procedures you must follow?





## Who is travelling – personal information

- Name
- Job title/department
- Birthdate (in order to book flights)
- Travel insurance that may exist
- Passport details (in case of foreign travel)
  - **Validity**
  - **Number**
  - **Place of issue**



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## Date and place information

- Meeting dates and times
- Meeting venue (country, city, adress)
- Special deadlines or confirmations that need to be made
- Consider not only „getting there“ but also “getting around” for a local transport information







## Individual preferences

- Free time required or return ASAP
- Night or day travel
- Seat preference
- Preferred vessel (plane, train, car,...)
- Accommodation preferences (type of hotel, room, amenities,...)
- Early check-in/late check-out
- Late at night food services



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- **Purpose of the meeting**

- In order to identify and recommend the best solutions
- To identify the budget that will be needed and what else to prepare
- Is it a meeting at high level?
- Is it a convention or exhibition?
- Any technology required for the meeting (WiFi, Car hire,...)
- Is the employee carrying something special on behalf of the company that may require insurance or special treatment?







- **Special requirements**

- Health issues (disability, pacemaker, special assistance required,...)
- Dietary requirements (vegan, diabetic, vegetarian, gluten-free, allergies,...)
- Suggestions or arrangements for sightseeing are needed?





## Best practice example:

Keep records on any special requirements and preferences for staff members who have regular business trips.



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## Travel and accomodation request form

- It is important to have all information written down so that it can be reffered to at any time to chcek that the correct plans are being made
- Document is usually in a form of a table
- Also for you to check if all information has been provided
- Signed by the traveller



# Travel and accomodation request form examples



Corporate Travel Request Page 1

PLEASE FAX 905-652-4766 OR EMAIL [info@1-2-1travel.net](mailto:info@1-2-1travel.net)

Company Name

TRAVELLER(s)

(Names as they appear on travel documents)

Last Name	First Name	Which documentation are you travelling with?

FLIGHT REQUEST

	Date of Travel	Approx Dep Time	Must be there by
From			
To			
To			
To			
To			



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# Travel and accomodation request form examples



Corporate Travel Request Page 2

PLEASE FAX 905-652-4766 OR EMAIL [info@1-2-1travel.net](mailto:info@1-2-1travel.net)

## ACCOMMODATION REQUEST

	Hotel One	Hotel Two	Hotel Three
Location/Destination			
Particular Area			
Property Name			
Check in Date			
Check out Date			
Number of Nights			
Number of Rooms			
Room Types			
Approx Arrival Time			
Do you want us to Guarantee?			

## CAR RENTAL REQUEST

	Car Rental 1	Car Rental 2	Car Rental 3
Location/Destination			
Particular Location			
Car Category			
Pick-up Date			
Pick-up Time			
Drop-off Date			
Total Days			
Automatic/Standard			



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# Travel and accomodation request form examples



Corporate Travel Request Page 3

PLEASE FAX 905-652-4766 OR EMAIL [info@1-2-1travel.net](mailto:info@1-2-1travel.net)

Special Request			
We will Guarantee? Type CC			

## LIMO/SHUTTLE SERVICE

Type of Service	Date of Service	Pick-up Location	Drop-off Location

## ADDITIONAL INFORMATION

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# Travel and accomodation request form examples



Corporate Travel Request Page 4

PLEASE FAX 905-652-4766 OR EMAIL [info@1-2-1travel.net](mailto:info@1-2-1travel.net)

## PAYMENT DETAILS

As per Corporate Profile

## Credit Card Payment Information

Type of Credit Card   
Name on Card   
Card Number   
Expiry

Have you completed a Credit Card Authorization Form with us?

## DOCUMENTATION DELIVERY INFORMATION

Email Address you would like Confirmation sent

**If Documentation:** Will you pick-up or prefer delivery? If delivery, please provide us with your address.



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# Travel and accomodation request form examples

## EMPLOYEE TRAVEL AUTHORIZATION FORM

EMPLOYEE NAME		EMPLOYEE ID	
DEPARTMENT		DEPARTURE DATE	
POSITION TITLE		RETURN DATE	
DESTINATION (City, State/Country)			

**BUSINESS PURPOSE** (check one): ☐ Audit-Inspection-Licensing; ☐ Client Support; ☐ Conference; ☐ Construction-Repair-Maintenance; ☐ Economic Development; ☐ General Expense/Other; ☐ Legal-Law Enforcement; ☐ Legislator; ☐ Meeting; ☐ Training;

**EXPLANATION of TRAVEL** (attach additional information as necessary):

EXPENSES	✓ Payment Method	Est. Cost
Airfare	<input type="checkbox"/> Employee Reimb. <input type="checkbox"/> Dept. Prepaid <input type="checkbox"/> Third-Party	
Mileage (personal vehicle)	<input type="checkbox"/> Employee Reimb. <input type="checkbox"/> Dept. Prepaid <input type="checkbox"/> Third-Party	
Rental Vehicle	<input type="checkbox"/> Employee Reimb. <input type="checkbox"/> Dept. Prepaid <input type="checkbox"/> Third-Party	
Other Transportation	<input type="checkbox"/> Employee Reimb. <input type="checkbox"/> Dept. Prepaid <input type="checkbox"/> Third-Party	

➤ Important: When applicable, complete "Authorization of Employee Expenses to be Paid by a Third-Party Organization" form.

EXPENSES	✓ Payment Method	Est. Cost
Lodging	<input type="checkbox"/> Employee Reimb. <input type="checkbox"/> Dept. Prepaid <input type="checkbox"/> Third-Party	
Meals	<input type="checkbox"/> Employee Reimb. <input type="checkbox"/> Dept. Prepaid <input type="checkbox"/> Third-Party	
Registration Fee	<input type="checkbox"/> Employee Reimb. <input type="checkbox"/> Dept. Prepaid <input type="checkbox"/> Third-Party	
Other Expenses	<input type="checkbox"/> Employee Reimb. <input type="checkbox"/> Dept. Prepaid <input type="checkbox"/> Third-Party	
TOTAL ESTIMATED COSTS		0.00

### EMPLOYEE CERTIFICATION

By signing below, I certify the requested travel is appropriate and necessary for conducting official State business, and agree to comply with the Agency of Administration's [Bulletin 3.4: Employee Travel & Expense Policy](#).

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

### DEPARTMENT HEAD (or Designee) AUTHORIZATION

☐ APPROVED

☐ DISAPPROVED

PRINTED NAME & TITLE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

### SECRETARY OF ADMINISTRATION AUTHORIZATION for OUT-OF-COUNTRY TRAVEL

☐ APPROVED

☐ DISAPPROVED

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_



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# Travel and accomodation request form examples



Travel Request Form

RESET FORM

Please turn in this form as soon as possible. No later than 2 week prior to departure date

Travel's Name:

Banner ID:

Employee ☐ Non-Employee ☐ Student ☐ Volunteer ☐

Mailing Address:

Reason for Trip:

Travel From:  Travel To:

Date Leaving:  Return Date:

Meeting Dates:  (Please attach business agenda)

Personal Dates:  (Business-only comparison required)

Birth Date:  Gender:

Mileage #:  Seating Preference:

Dept. Travel Card Used ☐ No ☐ Yes

Dept. PCard Used ☐ No ☐ Yes

Other Procurement Used ☐ No ☐ Yes

Notes:

Transportation: Mode of Travel  Air  \$  0.00

If flying please attach business itinerary or if driving POV please attach a google maps print out of route with miles

Lodging: Days at \$  0.00 Name of Lodging

Meals: Days at \$  0.00 (IAC set per diem rate for all In-state travel is \$80.00)

Ground Transport: \$  Rental car: ☐ Yes ☐ No Only allowed to rent up to Standard Size

Registration/Other: \$

TOTAL TRAVEL ESTIMATE \$  0.00

Fund	Orgn.	Acct.	Amount

\$ 0.00

Encumbrance Total

\$ 0.00

All travel is to be submitted 2-3 weeks in advance.  
Submission of this document is considered final; travel will be processed in accordance with UA travel regulations.  
Any changes to travel that differ from this form must be submitted in writing with a business justification.  
Any changes made to travel after final approval of travel authorization are subject to non-reimbursement  
Car rental must requested and approved prior to actual travel status.

\*\*\*Travel coordinator use only\*\*\*

TEM (AT) Routing	Y/N	Date
Submitted to traveler	<input type="checkbox"/>	
FW to FO-	<input type="checkbox"/>	
FW to Director/Dean	<input type="checkbox"/>	
FW to OCGA	<input type="checkbox"/>	
Final Approval	<input type="checkbox"/>	

TEM (ER) Routing	Y/N	Date
Submitted to traveler	<input type="checkbox"/>	
FW to Director/Dean	<input type="checkbox"/>	
FW to CRCD-	<input type="checkbox"/>	
FW to Central Travel	<input type="checkbox"/>	

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## **Company procedures, guidelines or restrictions that may exist**

- Are there any company policies regarding the travel?
- Are there budgetary requirements set for different positions in a company?
- Who is responsible to approve the budget?
- Do we need to tender for the best price?
- Are there any special booking deadlines for special rates?



## Following issues may be covered:

- Who's responsible for making travel arrangements?
- Do designated office professional handle travel arrangements for all managers?





## Following issues may be covered :

- Preferred travel agents
- Preferred airlines
- Membership details (eg frequent flyer programs)
- Approval process (eg names of people authorised to approve travel and expenditure - meals, taxis etc)
- Preferred accommodation
- Reservation process



## Following issues may be covered:

- What class is used when flying?
- Are private cars or rental cars used?
- How are payments made for reservations?
- Are cash advances given?
- Allowable expenses
- Documentation to be completed by travellers
- How are managers reimbursed for additional expenses?





## Framework contracts may exist with /for:

- Flight company
- Travel agent
- Taxi company
- Hotel chain or Specific hotels in often visited destinations
- ...



**Company may also have online accounts** set up for booking accommodation and travel through various booking sites, such as AirBnB to collect points to receive future discounts



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# The business travel budget



You will probably need to work within the budget of the person you are organising travel for, or ensure costs adhere to your organisation's travel policy



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# The business travel budget



- Many organisations have specific budgets for different aspects of a business trip, or have relationships with preferred providers that have agreed to certain rates for the organisation.
- **It is particularly important to keep costs in mind if there is no defined organisational policy on the class of travel and accommodation.**
- Find out in advance from your manager, or the traveller you are making arrangements for, whether a budget is set for the trip and how it is to be broken down.



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# The business travel budget



- Meals may have maximum amounts;
- Daily amounts may be set for hiring cars;
- Hotel rooms may need to be under a certain amount per night or week,...



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# Policies and procedures examples



## Example of policy can be found at:

- Federation University Australia

<http://policy.federation.edu.au/finance/travel/travel/ch02.php>

- Yale university

<https://your.yale.edu/policies-procedures/procedures/3301-pr01-travel-arrangements-university-business>

- Rochester institute of technology

<https://www.rit.edu/fa/controller/content/travel-policies-procedures-manual>

- University of Toronto

<http://finance.utoronto.ca/policies/gtfm/travel-and-other-reimbursable-expenses/travel-and-other-reimbursable-expenses-policies-and-guidelines/>



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## Immunization requirements

- Vaccinations may be required as condition of entry to any country
- World Health Organization (WHO) sends communication to local health departments advising them of required and recommended immunization for travelers
- Obtain Certificate of Vaccination that must be stamped by office administering vaccinations



## Country specific information

- VISA requirements / passport validity duration
- International driving licence
- Electrical socket
- Time-Zone
- Business customs and etiquette
- ...



## Types of transportation for business

- Taxi
- Company car
- Privately owned car for business
- Bus
- Train
- Airplane



# Travel arrangements



**There are a number of factors to take into consideration before deciding upon the mode of transport for the business trip:**

- **THE LENGTH OF THE JOURNEY**
  - Is the employee travelling abroad?
  - Is the employee travelling locally?
- **THE AMOUNT OF TIME AVAILABLE TO TRAVEL**
  - If the employee has an urgent meeting, then a suitable mode of transport would be needed to make sure that he/she got there on time.



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# Travel arrangements



- **THE COST OF TRAVEL**

- Organisations often work within very tight budgets therefore it is essential that the Admin Assistant gets the best value for money and makes use of any discounts available.

- **THE EMPLOYEE'S POSITION IN THE ORGANISATION**

- Depending upon the employee's seniority this can determine how much money is allocated to a business trip. For example, a salesperson will not be entitled to first class travel unlike a Managing Director.



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# Sources of information



- Gather all details

- Type of travel
- Class of travel
- Transport timetables
- Connections and transfers
- Time differences
- Budget



- A draft itinerary should be ready prior to the final booking!



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## Group discussion

Where would you look for information to book travel?  
- identify possible sources of information



# Sources of information



- Internet
- Maps
- Airport websites
- Travel Guides
- Travel agents
- Recommendations (personal, business partner from the other country, locals, ...)
- Company policies
- Information from past Business trips



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## Group discussion

- How would you proceed with the booking?
  - what are the booking type possibilities?
  - in small groups outline the booking process





## Possible booking sources

- Booking search websites
- Individual travel provider websites / offices
- Online and over the phone booking
- Travel agents





## Group discussion

- Do you have any experience with **travel agents** booking flights? Describe your exsperience.
- Can you recall any travel agencies to provide booking?



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## Travel Agent

### Pros:

- May save you a lot of time and money
- Extensive industry knowledge
- Have access to specific search engines and services, can make a reservation for flight for couple of days
- May have access to discounts
- May change booking to more appropriate (this may also be disadvantage)

### Cons:

- Costly
- May favor certain providers to get commission



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Have lot of information about and experience to:

- Arrange visas
- Time differences
- Details of connections and transfers
- Timetables
- Advice about car hire and booking procedures
- Arrange rail or local transport passes
- Arrange tickets for shows





## Internet flight search engines

- Provide information from lots of resources at one place
- May not show the best price / alternative

## Group discussion

Do you know any?

Have you used them before?



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## EXAMPLES:

- Skyscanner.net
- Momondo.com
- Kayak.com
- Seatguru.com
- Google flights



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## Individual travel companies websites

- When you know that you need a particular form of transport or provider
- Individual Airlines, Railways, Bus providers,
- Local transportation
  - Taxi companies
  - Public transport



# Do not forget!

- Airports are typically located approx 15-20 km from cities
  - Shuttle bus, limousine, taxi, car rental, and air taxi
- Compare cost and time each saves when making connection:
  - Is it needed to connect airports/heliport?
  - Is it needed to/from airport to hotel?



# Online flight booking process



1. Find your desired flight through a search engine (see above)
2. Book directly through airline webpage!
3. Enter all personal information required



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# Online flight booking process



4. Fill in the information on desired services: class, meal, luggage, insurance, possibility of cancellation or booking changes, ...

5. Book seats if possible

6. Proceed to required payment method



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**Give special attention to the spelling of the traveler's name.**

**If the name on the ticket and the name on the passport do not match, the passenger won't be allowed to board!**





**Do not forget that you need to make an  
ONLINE CHECK - IN  
couple of hours prior to the flight!**

# Sources of information



- Internet
- Maps
- Hotel Directories
- Travel Guides
- Travel agents
- Recommendations (personal, business partner from the other country,...)
- Company policies
- Information from past Business trips



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# Types of accomodation



- Hotel
- Business Hotel
- Wellness hotel
- Boutique hotel
- Bed and breakfast
- Entire apartment/house
- Airport hotel
- Single/Shared room



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## Internet booking sites

- Provide information from lots of resources at one place
- May not show the best price / alternative

## Group discussion

Do you know any?

Have you used them before?



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# Booking sources



## HOTELS:

- Booking.com
- Trivago.com
- Hotels.com
- Tripadvisor.com

## ALTERNATIVE:

- Airbnb.com
- Homeaway.com
- Housetrip.com



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## - Travel Agents

## - Individual hotels websites

— Provide more information and photos

— You should contact the hotel directly to ask for discount, confirm any special requirements and to confirm the booking



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## Keep in mind!

Booking a five-star hotel almost guarantees your boss will enjoy this trip, but it doesn't always. Call ahead and ask about anything going on at the hotel.

- Is there a conference going on that might make for long lines at the elevator, restaurants,...
- Is there a restaurant closed for refurbishment, or a pool being reconstructed?

**Make sure your boss is staying somewhere convenient, functional, and enjoyable.**



- Do you pay in advance or after checkout? Get a credit card number to hold the hotel and rental car reservations.
- Does the hotel have a gym? Pool?
- Do they have king beds? (For very tall bosses)
- Smoking/Non-Smoking room.
- Do they have a minibar?
- Is there Wi-Fi available? (or other broadband)



- Is there a restaurant in the hotel?
- If your boss is arriving late be sure and let the hotel know it will be a late arrival.
- Location is important!
  - Neighbourhood safety,
  - noise,
  - travel connections,
  - shops and restaurants nearby



# Methodological tool

„Stick to the budget“

EUPA\_LO\_064\_M\_001



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## Communications

- In your business travel planning, you should also gather information on what kind of communication options will be needed and how to optimise them in terms of quality and cost.
- You may want to check the roaming offers of the mobile phone service supplier in your country and also the ones by providers at the destination to make sure you find the best solution. This also includes considerations regarding safe internet connections and usage of laptops.



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## Consider buying refundable tickets

- In business plans can change quickly, and so do business travel plans. Meetings are often cancelled at the very last minute, and new meetings may be arranged. It depends on the type of travel and the distance to the destination amongst others, but purchasing refundable tickets where possible, can save costs and ensures your company does not lose all the money spent on tickets if a business trip is cancelled or plans change.



## Organise travel insurance

- Never forget to take care of organising travel insurance, as in case it covers everything from baggage, to cancellation fees and potential but hopefully not needed hospital costs and more. It is an item on your preparation list that will prove vital if the trip doesn't go exactly as planned.





# Methodological tool

„Additional information“

EUPA\_LO\_064\_M\_002



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# Methodological tool

- Booking the travel and accommodation selected
- EUPA\_LO\_065\_M\_001



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# Methodological tool

- Money Money Money
- EUPA\_LO\_067\_M\_001



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There are many payments required during a business trip:

- Travel
- Accommodation
- Food
- Other expenses: petrol (for hired car); sightseeing; taxis etc.



The different methods of payment for traveller available are:

- Cash (Local Currency)
- Traveller's cheques
- Credit / debit cards (private or company owned)



# Methods of payment

## Methods of payment for travel that company may choose from

- Company account
- Raising a purchase order
- Company credit cards/debit card
- Traveller pays and is reimbursed later
- Cash payment by the traveller with cash advance



## Cash

- Make sure that the employee has some local currency when travelling to pay for any emergencies eg a taxi.
- Check the exchange rate to find out the value of the local currency to get the best rate possible
- It is important that the employee does not carry a lot of cash in case his/her wallet gets stolen or lost.







## Cash

- Sometimes you may need to obtain foreign currency from your bank or travel agent.
- Common currencies will be kept in stock but you will have to order any unusual ones.
- Some countries have currency regulations that prevent local currency being taken out of the country, so your traveller has to obtain this on arrival.



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## Credit/Debit cards

- A credit card enables the employee to pay for goods and services and at the end of the month he/she receives a statement showing how much they are due to pay.
- The employee can decide to pay the amount in full or carry over the debt to another month.
- Employee can withdraw money from the ATM whenever cash is needed





## Travellers cheques

- more secure method of payment as only the employee is able to “cash” them.
- The employee is required to sign the traveller’s cheques when he/she receives them and whenever money is required the employee takes the travellers’ cheques to a suitable vendor and signs the amount of money he/she wishes to withdraw.
- This is an excellent method of payment as the employee can decide how much money he/she has with him/her at any given time.
- If the employee loses the traveller’s cheques, he/she can easily replace them as long as he/she has the serial number of each travellers’ cheque – this will confirm that they belonged to the employee.





## Expense Claim Forms /reimbursmets

The employee is entitled to claim back money that he/she spent for business reasons during the trip. For example:

- Taking a client out for dinner.
- Taxi costs from the Hotel to the Airport.

In order to claim back the money spent, the employee is required to complete an expense claim form.

The following information must be shown:

- Personal details.
- Details of the business trip: dates; purpose etc.
- The exact cost of each expenditure.

**It is important that the employee can provide the Finance Department with all receipts so that costs can be verified.**



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# Problems - Solutions with financial documentation



- **Missing receipts** – whenever possible duplications are being asked for from the supplier
- **Amount exceeds the agreed budget** – explanation is required and investigated individually
- **Payment made with wrong credit card** (company/personal) – additional reimbursement should be issued



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# EUROPEAN PERSONAL ASSISTANT LEVEL 3

## Planning for Common Business Travel Complications

While you can't prepare for everything, it's possible to make sure that you're ready for common problems that business travellers run into while on the road.



# Methodological tool

- Houston, we have a problem
- EUPA\_LO\_068\_M\_001



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## Misplaced Documents

- Encourage your boss to use a trip planner mobile app which stores all of their travel information in one place, helping them avoid trying to keep track of multiple pieces of paper
- To make sure that important documents for business meetings aren't misplaced, email your boss anything that you were asked to print out. That way if the hard copies are misplaced, your boss can print out new ones
- Also ask him to email himself a copy of their ID or passport in advance of their trip



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## Ground Transportation Problems

- Don't make your boss depend on a taxi or public transportation to get to the airport. During peak hours, it may be difficult to ensure that a ride is available at the right place and time, and public transportation can be unreliable. Instead, arrange for airport car service



## Flight Delays

- Buy a ticket that will get employee to the destination city several hours in advance of their first meeting. That way if the flight is delayed, your superior will still be able to make it to their meeting on time.
- Morning flights are less likely to be delayed than those later in the day.
- Check the history of each airline to find out which ones have a higher likelihood of delays at the airport that the employee is flying out of.



DESTINATION	FLIGHT	GATE	REMARKS
BERLIN	LH543	09	: DELAYED
NEW YORK	AA978	28	: CANCELLED
TORONTO	AC902	11	: CANCELLED
MADRID	IB342	15	: CANCELLED



## Lost Luggage

- If possible bring only carry-on luggage.
- If your boss is checking luggage, be sure that you gather all of the airline's customer service numbers and baggage policy information in advance so you don't have to search for this information when it gets lost.
- Some credit cards offer lost baggage protection that will reimburse travelers up to a certain dollar amount if their bags are lost. Some even offer help when luggage is delayed, for example to replace personal items after only three hours.



## Missed flight connections

- To avoid missed connections, book flights on one ticket. If you don't and your first flight arrives late, neither airline is obligated to assist you. You may even have to buy new tickets.
- If you're unable to do a one-ticket booking, leave plenty of time between flights—as much as twenty-four hours if it's an international transfer.
- Also consider buying change of flight option



## Billed for damages to a rental car

- Rental companies are going to bill you if they find any damage to their car. The rental contract allows them to charge you even if they find it after you return the car.
- Carefully note any damages to the vehicle, including dings and dents, before you drive away. Take time-and-date-stamped pictures of the vehicle at pickup and drop-off.
- Arrange proper insurance coverage







## Denied medical claims by travel insurance

- Travelers' medical claims won't get reimbursed if their insurance policies exclude coverage for pre-existing conditions, or they don't follow the rules of their policy after getting hurt.
- Travellers must notify the insurance company if they are injured or ill and follow specific protocol to receive a reimbursement. Furthermore, most policies won't pay travelers unless they see a doctor who advises them (or their traveling companion) to avoid travel





# Methodological tool

Check before you book

EUPA\_LO\_066\_M\_001



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An **Itinerary** is a plan of all travel arrangements and includes the following details:

- The dates of a business trip
- Important times the employee must note
- References for travel (flight numbers, train numbers, name and address of car hire company,...)
- Addresses and contacts for travel and accommodation companies
- The names of the people the employee is meeting as well as the venue address and times



The **Itinerary** is essential in planning a business trip for the following reasons:

- The employee's schedule is in order and clearly states where he/she is expected to be and with whom each day.



- The Admin Assistant has a copy so that the employee can be contacted at any time.
- The people whom the employee is meeting with will be aware of other commitments and priorities and therefore plan their meetings to fit around the employee's busy schedule.





## Best Practice

Each time you need to create an itinerary, follow these steps to update the template with the employee's travel information.

### 1. Personalize the **header** information on the template:

- Include your executive's name and your company name.
- Insert your company's name/logo.
- Update the travel dates.
- Do this on the first page and also in the header so it prints on any additional pages of the document if your itinerary is more than one page long.



## 2. Update/add all **airline** information:

- Delete all previous times on the itinerary template.
- Update all airline information requested on the template: dates, times, flight numbers, airline 800 numbers, travel agency numbers, and any information that might be needed while traveling.

## 3. Update the **ground transportation** information:

- Be sure to include car service info or shuttle/taxi contact numbers.
- List on the itinerary where the car service or shuttle will pick up the passenger.
- Include the confirmation number.



## 4. Update the **hotel** information:

- Be sure there is a contact number to reach the hotel.
- Include street address and any applicable driving directions necessary.
- Include the confirmation number and room rate.

## 5. Insert all **meeting information** in order of dates/times.

- Make sure to reference which time zone the time is listed in.
- Include conference number dial in and passcode information in case their flights are delayed and they need to join the meeting from their cell phone until they arrive at the meeting location.





6. Check each section of the itinerary for information that needs to be updated.
7. Treat the compilation of the itinerary as though you were the traveler. What additional information would you want to know?
  - Driving directions.
  - Restaurant options and/or locations.
  - Entertainment venues.
8. Proofread the completed itinerary. Make sure you proof it well.



# Tips for preparing the itinerary

- Always label times with AM or PM, or use 24hours format, and note any time zone changes. If the employee is travelling to different time zone, include both times on the itinerary, e.g., 2:00PM PST (5:00PM EST) so they don't have to calculate time zones on their own.



# Tips for preparing the itinerary



## Transportation

Aside from providing complete, detailed information, it is important to note the chronology of events. If your boss is flying, be sure to include the departure and arrival airport with the flight and seat numbers, airline, and corresponding times.

<b>7/21</b> <i>Monday</i>	<b>8:25AM</b>	Depart from <b>Miami International Airport (FL)</b> C-Suite Executive Assistants Airlines* 1-800-555-6789 <b>Flight 1234</b> to John F. Kennedy International Airport <b>Seat 1A</b> (window)
		Confirmation Number: BAZYPQ
	<b>11:40AM</b>	Arrive at John F. Kennedy International Airport (NY) <b>Gate C</b>



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# Tips for preparing the itinerary



- Including the **arrival gate number** serves two purposes: first, you may notify the driver who is picking up the employee of the gate, and ensure that you keep the driver updated of any gate changes.
- Second, if the gate does suddenly change—while your boss is on the flight, for example, or a last minute gate change upon arrival—your boss can quickly shoot you a text message to let you know the gate has changed. This keeps everyone informed at all times.



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# Tips for preparing the itinerary



- If traveling by **train**, include the departure and arrival stations with the train's complete name and number. Some stations have a number of departures to/from the same city. Some are local, and some run express. Hopping on the wrong train could cost your boss time and/or money.



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# Tips for preparing the itinerary

- If your boss does not use a private car service, include the name and phone numbers of local taxi services in each of the areas he/she is visiting. If your boss is good with their smartphone, install Uber, a car service application which allows users to request a private car.





# Tips for preparing the itinerary



- **Accommodation**

- Enter the full, exact name and address of the hotel where you've made reservations. Many hotels may have similar names in the same areas, or there may be multiple hotels under the same franchise in the same vicinity.
- Include the phone number for the front desk and the reservation confirmation number as well as check-in and check-out times.
- Be sure to note the executive's final day at the hotel on the itinerary, and include the time they are due to check out. This will also serve as a reminder to them to actually check out of the hotel so they avoid any potential surcharges.



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# Tips for preparing the itinerary



**7/22**  
*Tuesday*

2:00PM

**Check-in** starts at:  
C-Suite Executive Suites Hotel\*  
123 Main Street  
Bossville, NY 12345  
(212) 555-6789

Confirmation Number 123456789

**7/25**  
*Friday*

11:00AM

**Check-out** of C-Suite Executive Suites Hotel



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# Tips for preparing the itinerary



- **Meetings, Appointments, and Free Time**  
always include the date, time, and location of the meeting, as well as whom the executive will be meeting with, and the topic of discussion, or reason behind the meeting.
- Whenever possible, include the location's phone number (if they are a restaurant or business for example), and the contact information for the individuals involved in the meeting, in case your boss needs to contact them for any reason.



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# Tips for preparing the itinerary



**7/23**  
*Wednesday*

10:30AM

**Meeting** with Carol Coleman and Suzanne Coleman of Coleman and Company Executive Search to discuss recruiting talent for hedge funds:

Coffee House  
456 Main Street  
Bossville, NY 12345  
(646) 555-7891

Carol Coleman [Carol@Colemancompany.net](mailto:Carol@Colemancompany.net)  
(212) 867-4678

Suzanne Coleman [Suzanne@Colemancompany.net](mailto:Suzanne@Colemancompany.net)  
(212) 867-4678



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# Tips for preparing the itinerary

- If possible, include information about any individuals involved in the meeting with your boss, such as their online bio, LinkedIn information, or CV as an appendix to the itinerary. This will prepare the executive you support with snapshot information before their meeting, so they never have to struggle trying to recall who is who.
- Whenever possible, include a photo (LinkedIn profile picture).



# Tips for preparing the itinerary



- Note any free time during the duration of the trip the same way you would a meeting. Use a different color or font style so that this time stands out to him/her and they can readily identify when they have a break (or what time they have available to reschedule).

**7/23**  
Wednesday

1PM – 4PM

**OPEN**  
*NO MEETINGS OR APPOINTMENTS*



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# Itinerary examples

## Travel Itinerary

DAY:		DATE:	
Transfer to airport:			
Company:	_____	Reservation #	_____
Pickup Time:		_____ am/pm	
Flight			
Depart From:	_____	To:	_____
Check in time:	_____ am/pm	Depart:	_____ am/pm
Flight #:		_____	
Arrive:		_____ am/pm	
Transfer from airport:			
Company:	_____	Reservation #	_____
Time:		_____ am/pm	
Accommodation:			
Hotel:	_____	Reservation #	_____
Check-in time:		_____ am/pm	
Address:	_____	Phone:	_____
DAY:		DATE:	
Checkout time: _____ am/pm			
Transfer to airport:			
Company:	_____	Reservation #	_____
Time:		_____ am/pm	
Flight			
Depart From:	_____	To:	_____
Check in time:	_____ am/pm	Depart:	_____ am/pm
Flight #:		_____	
Arrive:		_____ am/pm	
Transfer from airport:			
Company:	_____	Reservation #	_____
Pickup Time:		_____ am/pm	
CAR RENTAL			
Rental Company:	_____	Reservation #	_____
Pick up date:	_____	time:	_____ am/pm
Drop off date:	_____	time:	_____ am/pm
Beginning km:	_____	End km:	_____
Fuel:		\$ _____	

© The Organised Housewife



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# Itinerary examples



The screenshot displays a web browser window titled "TripIt | Organize your travel - Windows Internet Explorer". The address bar shows "http://www.dev.tripit.com/trip/show/id/88". The page content is for a "Holiday Trip to Pittsburgh" organized by "me", scheduled for Pittsburgh, PA, 12/21 - 12/26/2007. The itinerary includes:

- Travelers:** me, suzanne\_maloney, ruchiemi, larrymmaloney.
- Viewers:** ruchiemi, larrymmaloney.
- Trip Details:**
  - Friday, December 21, 2007:** Flight from San Francisco (SFO) to Pittsburgh (PIT) on United Airlines 2691, departing SFO at 10:25pm and arriving PIT at 6:07am.
  - Saturday, December 22, 2007:** Map of Pittsburgh, Pennsylvania.
  - Avis pick-up on 12/22/2007:** Pick up at 6:30am, drop off at 5:30pm. Vehicle: Standard SUV (Chevrolet Trailblazer or similar), 5 seats, 2 large suitcases, unlimited mileage.
  - Hyatt Regency Pittsburgh International Airport check-in on 12/22/2007:** Primary Guest: Peter Harrison, Gold Passport Guest.

On the left side of the browser window, there are several email messages in the inbox, including "Fw: Your United flight confirmation - San Francisco to Pittsburgh" and "Fw: Avis Real-Time Reservation Confirmation".



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# Itinerary examples



Trip Name	
Month DD-DD, 2014	
PASSENGERS	
Month DD, 2014 - DAY OF WEEK	
Forecast: High XX° / Low XX° - weather	
Sunrise: X:XX AM / Sunset X: XX PM	
X:XX AM	Depart for airport Ground transportation
Confirmation #:	XXXX
Phone #:	XXX-XXX-XXXX
X:XX AM	Depart Airport AIR Carrier Flight #: XXXX Seat XX
Confirmation #:	XXXX
X:XX PM	Arrive Airport AIR Ground transportation
Confirmation #:	XXXX
Phone #:	XXX-XXX-XXXX
HOTEL:	Hotel Name XXX Street Address City, ST ZIPCOD
Confirmation #:	XXXX
Phone #:	XXX-XXX-XXXX
Month DD, 2014 - DAY OF WEEK	
Forecast: High XX° / Low XX° - weather	
Sunrise: X:XX AM / Sunset X: XX PM	
X:XX AM	Event
LOCATION:	Location Name XXX Street Address City, ST ZIPCOD
Phone #:	XXX-XXX-XXXX
Contact:	Phone #:
XXX-XXX-XXXX	
Month DD, 2014 - DAY OF WEEK	
Forecast: High XX° / Low XX° - weather	
Sunrise: X:XX AM / Sunset X: XX PM	
X:XX AM	Depart for airport Ground transportation
Confirmation #:	XXXX
Phone #:	XXX-XXX-XXXX
X:XX AM	Depart Airport AIR Carrier Flight #: XXXX Seat XX
Confirmation #:	XXXX
X:XX PM	Arrive Airport AIR Ground transportation
Confirmation #:	XXXX
Phone #:	XXX-XXX-XXXX



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## BUSINESS TRAVEL ITINERARY

Company Name : ABC Company  
Destination : Hong Kong  
Period : 5<sup>th</sup> – 8<sup>th</sup> January 2013

Date/Time	Location	Event	Detail
5 <sup>th</sup> January 2013, 6:00 AM	Singapore	Flight to Hong Kong	Flight Detail : Cathay Pacific Business Class
5 <sup>th</sup> January 2013, 10:00 AM	Hong Kong Airport Hong Kong Hotel	Arrive at Hong Kong Check in at Hong Kong hotel	Pick up by : Hotel Services Hotel Phone :
5 <sup>th</sup> January 2013, 01:00 PM	Hong Kong Hotel Hong Kong company	Meeting at Hong Kong company	Pick up by : Hong Kong company at hotel Hong Kong company phone :
5 <sup>th</sup> January 2013, 07:00 PM	Hong Kong Restaurant	Dinner with business partner	Pick up by : Business partner Business partner phone
6 <sup>th</sup> January 2013, 07:00 – 09:00 AM	Hong Kong Hotel	Breakfast	Breakfast at Flower Restaurant
6 <sup>th</sup> January 2013, 10:00 AM – 16:00 PM	Hong Kong Trade Center	Exhibition	Using MTR – Octopus Card Go to Hong Kong train station next to hotel Back to hotel using the same MTR or taxi
6 <sup>th</sup> January 2013, 07:00 PM	Hong Kong Restaurant	Dinner	Any place or at hotel
7 <sup>th</sup> January 2013, 08:00 – 10:00 AM	Hong Kong Hotel	Breakfast meeting with business partner	Breakfast at Flower Restaurant
7 <sup>th</sup> January 2013, 10:00 – 12:00 AM	Hong Kong Business Partner Company	Business partner manufacture visit	Pick up by : Business Partner Business Partner Phone :
7 <sup>th</sup> January 2013, 01:00 PM	Hong Kong Restaurant	Lunch with business partner	Business partner location choice
7 <sup>th</sup> January 2013, 03:00 PM	Hong Kong	Free time, city tour	The Peak Tsim Sha Tsui
8 <sup>th</sup> January 2013, 08:00 – 10:00 AM	Hong Kong Hotel	Breakfast meeting	Breakfast at Flower Restaurant
8 <sup>th</sup> January 2013, 12:00 AM	Hong Kong Hotel	Check Out from Hong Kong hotel	Hotel Taxi Services
8 <sup>th</sup> January 2013, 05:00 PM	Hong Kong Airport	Flight to Singapore	Flight Detail : Cathay Pacific Business Class
8 <sup>th</sup> January 2013, 09:00 PM	Singapore Airport	Arrive at Singapore	Pick up by : Company Car



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**Depending on your executive traveller's preferences, you may wish to consider creating an additional info pack. It could include:**

- information on the local language and maybe contact information for an interpreter,
- information regarding the local culture and according business manners,
- public holidays,
- the climate and weather,
- suggestions for restaurants, bars, cafés and/or entertainment.



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- Currency
- Maps
- Tickets (E-ticket, Paper ticket, Electronic or printed airline itinerary)
- Accommodation confirmation documents
- Insurance forms
- Visas
- Passport
- Vaccination certificate,
- Accommodation vouchers
- International driving licence
- Credit cards
- Business cards



# Methodological tool

- Bon Voyage
- EUPA\_LO\_069\_M\_001



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- Making travel arrangements is very time consuming so allow plenty of time to clarify details, make booking enquiries and confirm bookings
- All meetings, appointments or conference attendance should have been confirmed weeks before the departure of the traveller and details incorporated into an itinerary



## Stay updated

- As a PA you are responsible for your manager's business trip running smoothly. Make sure you keep checking on potential changes regarding meetings, itinerary plans and other schedules, including changes to flight times. Check regularly via phone and online for updates and changes. This way you have the latest information at hand helping you, for example, to ensure executive travellers are in time for their flight and are not losing valuable time waiting at the airport.





# Checking itinerary prior the travel



- It is important to confirm travel bookings before travel takes place. The amount of notice that you are given to arrange travel may vary, and sometimes you might have to work to tight time lines.
- To meet designated time lines, it is best to identify what arrangements you need to make as early as possible, leaving yourself time to check and confirm arrangements.



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# Checking itinerary prior the travel



- Here are examples of problems that could occur. Make sure you identify them early and address each one according to the following checklist.



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# Checking itinerary prior the travel



## Payment errors

- If prepayment has been made, making sure that the payment has been processed fully prior to travel will avoid any problems at check-in or during the trip.
- It is also important to confirm price of travel and accomodation in writing, so that when the employee arrives there is no chance of prices increasing.



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# Checking itinerary prior the travel



## Booking errors

- Make sure the booking you made has been processed correctly, especially where flights, times, traveller preferences and other variables have been requested.

## Other errors

- Double-checking and confirming departure times, flight numbers, car bookings and so on is a good measure to take, as often once a trip has started, trying to make late changes to bookings can be a difficult, costly and sometimes impossible process



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# Checking itinerary prior the travel



## Visa and passport errors

- Verify that visas are for the appropriate length of time, are the right type (e.g. for business rather than leisure) and have been issued properly. Make a final check that the traveller's passport is in order, and that any other needed documentation (such as letters from their doctor authorising them to carry medicines prescribed for them and vaccination certificates) have also been arranged.



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# Updating and informing your boss



Though it may be difficult to keep your boss informed about the flight delays or any other updates, the traveller can download and use certain apps on their phone so that they can keep track of their baggage claim locations, flight delays, gate changes and seat availability.



Your boss should also be updated with the events, meetings to attend, future flight changes as they are on their trip. In case there are any delays or cancellation of flights due to major weather conditions, your boss should be updated.



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# Last minute conformations



- Appointments and reservations should always be confirmed the day or two before they are scheduled to occur.
- 24 hours before a flight or train departure, check with the airline or train station to inquire about potential delays (particularly during cold weather months due to ice/snow).



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# Last minute conformations



- Remember to call credit card companies and banks and notify them of your boss's plans, locations and dates of travel. Banks and credit card companies will sometimes freeze accounts if they believe there is possible fraudulent activity
- Finally, email an electronic copy to your boss, and to anyone else they request a copy to be sent to (their spouse, business partner, etc.) Print off several copies for him/her to keep in his/her carry-on, briefcase, and/or purse, and print a hard copy for yourself for easy access.



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# Last minute conformationations



- **Confirming the day before:** Make sure that you confirm every aspect the day before travel. Check for confirmation email from airline, confirmation for baggage fee and flight reservation, confirmation for restaurant and reservation for the number of people and more. Call up your boss and other business contacts that are about to travel and double check with all the details so that they have a happy journey without issues.



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- **Review Question 1**
  - List the possible questions that need to be asked prior the business travel
- **Review Question 2**
  - Name at least 3 types of travel booking sources with their advantages and disadvantages
- **Review Question 3**
  - Why is it important to chcek the bookings prior the travel?





- When booking pay attention to individual preferences and special requirements
- If possible use services of a travel agent
- Keep in mind the budget and the company travel policy
- Do not forget to doublecheck everything prior the travel



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# Well Done!

## You have completed this unit



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