DIRECT TRAVEL | TRAVEL PROGRAM WORKSHEET

Why Did the Traveler Book Elsewhere

Understand the booking. Identify the barrier. Agree on the improvement.

Use this worksheet with a traveler or executive assistant to review one outside booking. Complete the relevant sections and record any evidence. Then agree on action and follow up after the next comparable trip.

1 of 3 Understand the booking

Review date and reviewer

Trip dates and destination

Booking type ☐ Flight ☐ Hotel ☐ Rail ☐ Other

Where the traveler booked and the main reason they gave

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1 Could they find the option they needed

Ask the traveler

"What flight, hotel, fare or room type were you looking for, and where did you eventually find it?"

What to check

☐ Option unavailable, difficult to find or restricted by policy

☐ Same dates, search criteria and booking conditions compared

☐ Applicable loyalty benefits visible and accessible

What we learned

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2 Did they find a better price elsewhere

Ask the traveler

"What price did you find outside the program, and how did it compare with the option you saw inside it?"

Compare the same dates, flight or hotel, fare or room type, baggage, inclusions, cancellation terms, taxes, fees and applicable loyalty benefits.

What we learned and evidence reviewed

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2 of 3 Identify the barriers

3 Was booking within the program too difficult

Ask the traveler

"At what point did you decide it would be easier to book somewhere else?"

What to check

☐ Signing in or finding suitable options

☐ Understanding policy or obtaining approval

☐ Completing payment or confirming the booking

Where the traveler got stuck and what we learned

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4 Did the trip involve a need the program did not accommodate

Ask the traveler

"What did this trip require that you could not arrange through the program?"

What to check

☐ Complex itinerary, accessibility need or extended stay

☐ Expected loyalty benefits unavailable or unclear

☐ Advisor support or an exception process available and understood

The need and what we learned

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5 Did a previous service experience influence the decision

Ask the traveler

"Did something that happened on an earlier trip affect where you booked this time?"

What to check

☐ Help difficult to reach or slow to respond

☐ Repeated explanations or handoffs between providers

☐ Unclear updates or a problem left unresolved

The previous experience and what we learned

Supporting evidence for these findings

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3 of 3 Agree on action

Choose the most important issue to address. If there are several, assign a separate action and owner for each.

How should this booking be classified?

☐ Program issue that can be addressed

☐ Valid exception

☐ Further investigation needed

Confirmed cause or question still to investigate

Evidence supporting this assessment

Possible actions to consider

Improve content access or search guidance; address a verified pricing gap; clarify offer comparisons or loyalty benefits; simplify booking or approvals; improve specialist support or service follow-up.

Agreed improvement or next step

Person responsible and target date

How travelers will learn about the change

How success will be measured

Follow up after the next comparable trip

Follow-up date

Could the traveler accomplish what they needed within the program?

☐ Yes ☐ Partly ☐ No ☐ No comparable booking yet

What worked and what still needs attention

Record valid exceptions separately so improvements focus on problems the program can address.