

# **Corporate - Procedure Manual**

This manual is designed to acquaint you with Montrose Travel's services, procedures and personnel. We hope to encourage you to take full advantage of our experience and professional know-how.

Montrose travel is proud to be serving your commercial needs and pledges to maintain the highest quality of travel management at all times.

**Welcome to the Montrose Travel family... We look forward to working with you!**

## **PRELIMINARY PROCEDURES FOR THE TRAVEL COORDINATOR**

Before you begin to plan a trip and make reservations, you should become familiar with the following tools offered by Montrose Travel:

- Business Traveler Profile Form
- Travel Request Fax Form
- 24-hour Telephone Services
- Traveler Wallet Card
- Corporate Travel Policy Adherence
- Invoice / Itinerary
- Airline Ticket and Boarding Passes
- Lost Luggage Alert Baggage Tags
- Free Insurance Provided by Montrose Travel
- Additional Insurance Protection
- Hotel Guides

## **Business Traveler Profile Form**

One of the fundamental factors of our success is the compilation of a computer profile for each of your travelers. Each traveler is requested to complete the Business Traveler Profile Form. Once this data is entered into our advanced computer system the frequent flyer numbers, seat preferences, special meals, car & hotel ID numbers and any other particular need of the traveler are automatically entered into every reservation.

It is important for you to advise Montrose Travel of any updates or changes. If all profile information is current you will see significant timesaving when booking reservations.

## **Travel Request Fax Form**

The Montrose Travel Request Fax Form is an easy way to compile all trip information in one place. This form can either be used as a reference when calling in the reservation or can be faxed over to us if that is more convenient.

## **24-Hour Telephone Service**

After normal business hours or on weekends and holidays, you and your travelers have the benefit of having your travel arrangements made or changed for you through Montrose Travel's 24-hour toll-free executive service, 365 days a year, from around the world.

## **Traveler Wallet Card**

Each of your business travelers will be given a wallet card showing the USA 800 numbers and all domestic and international toll free 24-hour numbers. Encourage your travelers to carry this card with them at all times to enable the traveler to contact us at anytime, from anywhere.

## **Corporate Travel Policy Adherence**

If your company has a written travel and expense (T & E) policy, Montrose Travel will have a copy of it and will make your travel arrangements in accordance with company policy.

Your travel coordinator should also have a copy of your company T & E

Policy and should become familiar with its contents.

### **Invoice and Itinerary**

Together with the tickets and other documents that you receive from Montrose Travel will be an Invoice / Itinerary that includes, Billing Information, Travelers Itinerary, Hotel and Car Information and Confirmation, Airline Ticket Numbers and Other Important Information.

### **Airline Ticket and Boarding Pass\***

Always check the airline ticket at the time of delivery. Whenever permitted by airlines, Montrose Travel will always include boarding passes.

\* Most airlines no longer offer advance boarding passes for security and check-in purposes.

### **Lost Luggage Alert Baggage Tags**

Montrose Travel provides your travelers with luggage tags that will enable airlines to expedite the return of lost luggage to business travelers. Please provide us with business cards of your travelers so that we can make each individual a personalized baggage tag with your special VIT Code (A1SI4).

### **Free Insurance Provided by Montrose Travel**

Montrose Travel provides \$100,000 worth of Free automatic flight insurance on every ticket that is issued in our office. A copy of the policy is included in the appendix.

### **Additional Insurance Protection**

Montrose Travel also provides additional insurance for any trip if so desired. Simply phone your Montrose Travel agent for further details and associated costs.

### **BEFORE THE RESERVATIONS: Trip Planning**

Submit the completed Business Traveler Profile form to Montrose Travel and retain a copy for your files. Gather all trip information or use

the Travel Request Form to assemble the following data:

### **Passenger Name**

If a Business Traveler Profile form is on file with Montrose Travel no additional background and billing information is necessary.

If no Business Traveler Profile form has been filed with Montrose Travel you will need to know which department or division, billing information or credit card number, as well as frequent flyer number. (Please complete Traveler Profile form as soon as possible)

### **Travel Date and Flexibility**

Should the traveler's itinerary be flexible please make note of this. A flexible itinerary can save your company money because Montrose Travel can choose from among several flights with a variety of fare structures.

### **Airport**

If there is more than one airport in the traveler's city of departure or arrival, please specify which the traveler prefers.

## **BOOKING RESERVATIONS**

### **USE YOUR TRAVEL REQUEST FAX FORM, or CALL IN**

Identify yourself and your company

Ask for your assigned Montrose Travel Counselor

Identify the person for whom you are making the reservation(s)

Please have the following information ready and available:

### **Airline Reservations**

Date of Travel

Destination and /or requested airport

Approximate time (flexibility is the key to savings)

Due to flight numbers changing frequently, we suggest requesting approximate flight times rather than specific flight numbers, as listed in a printed airline guide or on the internet.

### **Hotel Reservations**

Hotel choice (The lowest available Montrose Travel rate or your own corporate negotiated rate will be confirmed)

City location (Airport or downtown etc)

Single or double occupancy

Number of nights required

Smoking or non-smoking

Check-in time (late arrivals after 6pm must be guaranteed with a credit card)

### **Car Reservations**

The dates that the car will be needed

Pick-up time

Drop-off location

Special requirements (keep in mind that car rental companies vary on minimum age requirements)

### **Rail Reservations**

Date of travel

Destination and / or requested train station

Approximate time

Montrose Travel can provide you with tickets for all Amtrak Reservations.

The agent will confirm all reservations in accordance with your company's policy or the Business Traveler Profile form unless you or the traveler requests otherwise.

### **HOTEL CANCELLATION POLICY**

To make sure that your traveler always has a hotel room waiting for him, it may help to understand hotel policies concerning reservations and cancellations.

#### **Guaranteed Accommodations**

A "guaranteed" room is really an exchange of promises between the traveler (through his travel agency) and the hotel. The hotel promises to keep a room ready for the traveler throughout the night, thus turning away other guests (and revenues). In turn, the traveler promises to use the room, cancel his reservation by 6 pm (or earlier, according to hotel policy) of the night of his arrival, or pay a "no-show" charge equivalent to one night's lodging.

#### **Cancellations**

If your traveler is not going to use the room reserved for him / her, **BE SURE TO CANCEL**. Most hotels will allow cancellations without penalty up to 6 pm (local time) on the day of arrival. You should still call to cancel even after the 6 **PM** "cut-off". The room may be resold and the no-show penalty avoided.

If you need to cancel, call us and we will handle it for you. If you cancel the reservation, for your traveler's protection be sure to record:

The name of the person with whom you spoke

The date and time of the cancellation

The cancellation number

## **Hotel Overbooking**

Nothing is more frustrating to a traveler holding a confirmed reservation than being told that the hotel is sold out for the night.

Hotels overbook as a matter of policy (as do car rental companies and airlines). To insure maximum occupancy, a hotel will overbook to allow for no-shows and last-minute cancellations. This leaves the late-arriving business traveler vulnerable to being "turned away." Almost all hotels have a policy in place that provides some compensation when they turn a traveler away.

If your traveler's reservation was "guaranteed", that is, secured by a credit card number, advance deposit, or by a corporate rate guaranteed by Montrose Travel, compensation usually includes transportation to an alternate hotel and the first night's lodging. If your traveler is confronted with a "turned away" situation, he / she should ask what compensation the hotel's policy will provide.

**If a car, hotel or airline representative disagrees with any of your reservations, immediately call Montrose Travel for assistance.**

**(During normal business hours, an outside of the 818 and 213 area codes, call (800) 766-4687 or after hours, weekends and holidays (800) 628-6668 - VIT Code: A1SI4)**

## **AIRLINE RESERVED SEATING / BOARDING PASSES**

Montrose Travel will reserve seats and issue boarding passes when allowed by the airlines. While Montrose Travel will reserve seating based upon the traveler's preference at the time of reservation, the airline restricts the issuance of boarding passes until 30 days prior to flight departure. A majority of the airlines restrict issuance of boarding passes for the international flights to airport check-in.

There are instances when the airline will not confirm seating requests due to potential equipment changes, commuter carriers or if you are traveling on certain discounted fares. In this situation your Montrose Travel agent will advise you.

Seating assignments will be indicated on the itinerary and the boarding passes will be attached to the appropriate ticket coupon. While airline policies differ, generally, if you have been issued a boarding pass, your seat will be held until 30 minutes prior to departure. Travelers with pre-boarding passes should always check in at the gate at least 30 minutes prior to the flight to ensure that their reserved seat does not get reassigned to someone else.

### **Delayed Flights**

When you are unable to make a connecting flight because the flight has been delayed for any number of reasons including mechanical difficulties, weather, etc., the burden of responsibility in this case rests on the carrier whose flight has been delayed. Although not a written regulation, most carriers will book you to your final destination on the next available flight even if it is not their airline.

If mealtime and / or overnight are involved, they will sometimes provide vouchers for dinner and hotel room as compensation. This action is not a written regulation, but travelers are urged to inquire about these services should this situation exist. If the carrier does not comply, contact Montrose Travel for immediate assistance.

### **Overbooked or Canceled Flights**

You are holding a confirmed airline ticket and the flight has been overbooked. Most major carriers will ask for volunteers to take the next available flight. **IF YOU STILL ARE UNABLE TO BOARD**, most carriers will make a decided effort to book you on the next available flight, no matter the carrier. If they are unable to get you to your destination within two hours of the original flight time (four hours internationally), they will offer a refund on your present ticket and offer another ticket for the next flight, with no payment required. They may also offer monies to compensate for your inconvenience (denied boarding compensation). If the waiting period involves a mealtime and /or overnight, most carriers will pay for the meal and / or overnight stay. Some carriers do not follow this policy. If this happens, please notify Montrose Travel in order to file the necessary complaint and compensation request letters on your behalf.

If the carrier changes equipment size prior to flight time, no compensation is offered. However, major carriers who cancel flights just

prior to flight time will do their best to find the next available flight for you. Call Montrose Travel for any additional assistance.

### **CORPORATE FREQUENT FLYER PROGRAMS**

Montrose Travel will be happy to provide assistance in enrolling your travelers into airline frequent flyer programs of their choice. If your policy dictates, travelers who enroll themselves in airline frequent flyer programs would do so for personal travel only and use their home address for mailings.

When Montrose Travel makes business travel reservations for your travelers, the traveler's frequent flyer membership number is automatically transmitted to the airline (provided the traveler has completed and turned in a Business Traveler Profile Form). However, at the time of check-in, the traveler should confirm that his / her number is entered into the record correctly.

### **PASSPORT AND VISA SERVICES**

Montrose Travel provides free assistance with passports and visas, including free photos in our office.

Working through Montrose Travel, all international documents for personal and business travel may be obtained. Each of our Management Account Teams is thoroughly knowledgeable about all documents required.

### **QUALITY CONTROL**

There are a series of manual and automated measures that Montrose Travel has adopted to ensure optimum quality control.

Our services and staff performances are continually monitored and evaluated in the following areas:

#### **Accuracy**

All Montrose Travel documents are checked at least twice by two different people before leaving the office, ensuring that all documents produced are accurately processed.

### **Adherence to Corporate Travel Policies**

Each of our Management Account Teams is continually briefed concerning your goals and special requirements. These reminders will include updates on travel policies, requirements for hotels and car rentals, etc.

### **Alternate Route and Times Advice**

We have trained our staff to be thorough in explaining all options and in discussing all details that may affect mode of travel, hotel selection, etc. The importance of personalized service and the effort to save your company money is constantly emphasized.

## **CHECKING THE DOCUMENTS**

All trip planning and reservation requests are behind you. You now have tickets and other travel papers in hand. Here is a checklist to follow after you've received your travel documents:

Upon receipt, **check all documents** for accuracy against your own reservation record. Make sure all requested documents have been received, i.e., airline tickets hotel and car reservations.

**Check the ticket.** There should be a coupon, and possibly a boarding pass, for each flight segment.

**Check Invoice / Itinerary** which recaps all travel plans at a glance.

Information found on invoice / itinerary:

- Billing information
- Itinerary
- Car confirmation # and car class
- Hotel confirmation, address and rate confirmed
- Cost of airline ticket

- Seat assignments

**If all documents are in order**, give immediately to the traveler or put in secure place until you can give them to the traveler.

**If there is an error** of any kind, telephone Montrose Travel and the error will be corrected immediately. Replacement documents will be issued and delivered to you promptly.

### **DEFINITION OF AIRLINE TERMS**

**Non-Stop** Non-stop flight into airport.

**Direct Flight** Flight makes one or more stops; no change of planes

**Connections** Flight makes a stop and passengers must change planes

**Load Factor** Airlines frequently change fares to encourage passengers during off peak hours. By connecting travelers through an airline's **HUB**, the airline can increase profitability on every route.

**Economy Fares** Several airlines offer reduced fares without restrictions. These fares are based on a limited allotment of seats throughout the aircraft available without restrictions; therefore, reservations should be placed as soon as possible. These fares sell out very quickly.

**3-Day Advance** Tickets must be issued at least three days prior to each segment, no minimum or maximum stay. Airline fares advance-purchase requirements, rules and regulations change constantly.

**Waitlist** Although a reservation is booked in coach class, the reservation will be monitored to see if a lower fare will become available. The itinerary will note this waitlist for the traveler to follow-up while enroute or at the airport. You will find your waitlist information directly under the flight that is confirmed on your itinerary. Montrose Travel will advise you if the waitlist clears prior to your departure.

**Supersavers** Seven, fourteen or twenty-one day advance purchases; stay over Saturday night. Penalties may apply for cancellation or

changes.

**Ultrasavers** 30 days advance purchase; traveler must stay over a Saturday night, cancellation / change penalties apply. Sometimes must be ticketed same day as booked.

### **Secondary**

**Airports** Certain cities have secondary airports that offer lower fares

For example: Houston - Hobby

Washington - National

Los Angeles - Long Beach, Burbank

Ontario, Orange County

Chicago - Midway

**Standby** You can change to a flight without a confirmed reservation by checking at the ticket counter to see if a seat becomes available. Contact Montrose Travel to check availability. Additional costs should not apply.

## **TECHNIQUES TO LOWER TRAVEL EXPENSES**

The ideas listed below are techniques experienced travelers use in minimizing their travel expenses. The challenge is to be continuously looking for ways to reduce travel costs and to employ as many of these techniques as possible.

### **A. Plan Ahead!!!**

Travelers should give themselves and their travel coordinators plenty of advance notice in order to maximize the opportunities to use discount or promotional airfares which are subject to limited availability.

B. **Be Flexible** in making travel arrangements.

Schedule a business trip around the lowest cost airfare consistent with the trip's objectives and with your company travel policy if one is in effect.

D. **Car Rental Location**

Car rental companies located directly on the airport terminal tend to offer higher rental rates than those located within shuttle distance of the airport. If your schedule allows for the additional time required in renting a car off terminal, then savings of 10% or more are available. In either case Montrose Travel offers negotiated rates based upon our volume that offer you savings as well as additional benefits, based upon the particular program, such as the collision/damage waiver at no additional charge.

E. **Always Cancel Unneeded Hotel Reservations**

Failure to notify your Montrose Travel Counselor of a change in plans will result in a "no show" charge for an unused room if a credit card was used to guarantee the room.

C. **Dine Outside of the Hotel Whenever Possible**

Hotel restaurants are typically 20% more expensive than equal quality independent establishments. Hotel breakfasts are typically twice as expensive as those offered elsewhere.

## **PROBLEMS SOMETIMES ENCOUNTERED ENROUTE**

1. **Delayed Flights**

You are unable to make a connecting flight because the flight has been delayed for any number of reasons including mechanical difficulties, weather, etc. The burden of responsibility in this case rests on the carrier whose flight was delayed. Although not a written regulation, most carriers will book you to your final destination on the next available flight even if it is not on their

airline.

If mealtime and / or overnight are involved, they will sometimes provide vouchers for dinner and a hotel room as compensation. This action is not a written regulation, but travelers are urged to inquire about these services should this situation exist. If the carrier does not comply, contact Montrose Travel for immediate assistance.

## **2. Overbooked or Canceled Flights**

You are holding a confirmed airline ticket and the flight has been overbooked. Most major carriers will ask for volunteers to take the next available flight. IF YOU STILL ARE UNABLE TO BOARD, most carriers will make a decided effort to book you on the next available flight, no matter the carrier. If they are unable to get you to your destination within two hours of the original flight time (four hours internationally), they may offer a refund on your present ticket and offer another ticket for the next flight, with no payment required. They may also offer monies to compensate for your inconvenience (denied boarding compensation). If the waiting period involves a mealtime and / or overnight, most carriers will pay for the meal and / or overnight stay. Some carriers do not follow this policy. If this happens, please notify Montrose Travel in order to file the necessary complaint and compensation request letters on your behalf.

If the carrier changes equipment size prior to flight time no compensation is offered. However, major carriers who cancel flights just prior to flight time will do their best to find the next available flight for you. Call Montrose travel for any additional assistance.

## **3. Rental Car Reservations Not Honored**

You are holding a confirmed rental car reservation and when you reach the counter, no car is available. Montrose Travel urges the traveler to understand that this is the rental car company's problem, not yours. Many car rental agencies will go to their competitors in order to fill the order.

#### 4. **Changes in Itinerary Enroute**

If you ever need to change flight or hotel schedules while traveling call Montrose Travel, or our 24 hour service, anytime to make those changes. If the change involves another airline ticket, hotel or car rental reservation, Montrose Travel will accommodate and verbally give you the new information. If a new airline ticket is required, Montrose Travel will prepay that ticket for pickup at your departure airport counter.

#### 5. **Lost Luggage**

**Temporary** - You arrive at your destination and your luggage does not. Fill out the lost luggage form for the airline involved and contact Montrose Travel immediately through our 24-hour number. Montrose Travel will initiate the search and have your luggage delivered to your first available destination.

If you have a meeting prior to a bag's potential arrival, the traveler should request a "remain overnight kit", a voucher for a shirt, etc. There are no written regulations to support the traveler, but the airlines will often provide support to travelers who request it.

**Permanently** - In rare instances, luggage may be permanently lost. Montrose Travel will assist the traveler in completing the necessary claims to recover as much of the purchase value as possible, using replacement values to determine the amount of the claim.

#### **Damaged Luggage**

You arrive at your destination and your luggage has suffered a significant amount of damage. It is imperative that the traveler reports the damaged luggage and files a claim at the time the damage is noted. Claims filed several days after a trip is over will generally not be successful. All carriers have offices on the airport premises to handle these complaints.

#### 7. **Lost Airline Tickets**

You discover that your tickets have been misplaced or lost. Notify Montrose Travel immediately and we will file a "lost ticket application" with the appropriate carrier. In the meantime Montrose Travel will issue another ticket to cover the rest of your itinerary. Of course, the new ticket must be paid for. Airlines usually wait several months before compensating the traveler to insure that the lost ticket has not been accounted for, either through usage, exchange, or refund.

## **8. Seat Assignments**

You arrive at the airport and are told that your pre-assigned seat / boarding pass cannot be honored. The airline could have changed equipment causing a new aircraft configuration to void out previous seat assignments or your check-in time was less than 30 minutes (60 minutes on international flights) prior to departure causing the airline to assume you would not be on the flight.

If seats were not assigned prior to departure, it would be because your particular preference was not available or that airline would not accept the request. There are times when even though the reservation was made more than 24 hours out, the airline has chosen to hold out a particular number of seats or maybe even the entire aircraft to airport check-in only. Eighty-five percent of all business travelers prefer non-smoking aisle seating which could explain why this particular type of seat is often difficult to confirm (always check at the airport for openings). If you find yourself asked by an airline attendant to move to another seat it could be because your preference is for bulkhead which is usually reserved for the elderly, the handicapped, or unaccompanied minors.

## **CONCLUSION**

As your chosen Travel Management Partner, Montrose Travel will work diligently to assure that all travel arrangements are within the guidelines of your company's travel policy.

We ask for your assistance in achieving our mutual goal of significant cost savings on all travel expenditures. If so desired, your Montrose

Travel's Executive Account Team will always work to find the most economical rate and route for every traveler. Your cooperation in this cost savings endeavor is crucial.

In the meantime, if you encounter service problems, even the most minor problems, **we want to know.**

**Montrose Travel is here and is ready to serve all of your travel needs.**

**Again... Welcome to our family**

