

Travel Itinerary Template

Effectively organizing all of the details of an executive's travel plans requires a travel itinerary template that you use consistently. Don't ask your travelers if they want one – JUST DO IT! They'll thank you for it later. And in the mean time, you'll have saved them a lot of time and hassle in sorting through multiple documents or scrolling through multiple emails to find the information they need at the moment they need it while they are traveling. I know this because every executive I've ever created one for initially comes to expect and/or demand them for future trips. I've done a fair share of traveling myself, and trips with an itinerary are much more efficient.

Think Chronologically

If you haven't done a lot of travel planning in the past, one of the first things I encourage you to do is THINK CHRONOLOGICALLY. What is the order of events for your traveler throughout their trip? This will help you get all of the arrangements made that are required from the start (flights, ground transportation, hotel, meals, meetings, etc.).

How to Use This Travel Itinerary Template

This template is designed to cover all of the basic details that need to be included on an itinerary for a traveling executive. Not every trip requires airline travel. Not every trip requires rental cars. It may change from trip to trip and traveler to traveler. Remain flexible. **Customize this template** to make it fit more specifically to your executive's specific travel needs.

Here are some tips to get you started:

- All of the items in **blue** or with blanks are the details you'll need to insert or fill in as appropriate for each trip.
- If you have executives that travel frequently to the same places, save their past travel itineraries. Open the most recent version, update with the new date and travel details without having to recreate the entire document each time they travel. It's a huge time saver!
- Print a final copy for your executive AND a copy for your file so you have the same information if they need travel assistance while they are gone. If appropriate, you can also print an additional copy for the traveler's family so they know where they'll be and when as well.
- If your executives have e-tickets for their flights, print a copy of the flight reservation from your travel agency or online booking service and staple it to the back of the itinerary just in case there are any issues when they check in at the airport.

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

1. Personalize the **HEADER** information on the template
 - a. Include your executive's name and your company name.
 - b. Insert your company's name/logo.
 - c. Update the travel dates.
 - d. Do this on the 1st page AND also in the header so it prints on any additional pages of the document if your itinerary is more than 1 page long.
2. Update/add all **AIRLINE** information:
 - a. Delete all previous times on the itinerary template.
 - b. Update all airline information requested on the template: dates, times, flight numbers, airline 800 numbers, travel agency numbers, any information that might be needed while traveling.
3. Update the **GROUND TRANSPORTATION** information:
 - a. Be sure to include car service info or shuttle/taxi contact numbers.
 - b. List on the itinerary where the car service or shuttle will pick the passenger up.
 - c. Include the confirmation number.
4. Update the **HOTEL** information:
 - a. Be sure there is a hotel contact number to reach the hotel.
 - b. Include street address and any applicable driving directions necessary.
 - c. Include the confirmation number and room rate.
5. Insert all pertinent **MEETING INFORMATION** in order of dates/times.
 - a. Make sure to reference which time zone the time is listed in.
[TIP: Go to <http://www.timeanddate.com/time/> to find out which time zone abbreviations apply at various times of the year.]
 - b. 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. (Trust me, it happens!)
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?
 - a. Driving directions
 - b. Restaurant options and/or locations
 - c. Entertainment venues
 - d. How to dial in to get voice messages
 - e. How to access email (or webmail) remotely
8. **PROOF READ, PROOF READ, PROOF READ** the completed itinerary. There are a lot of details here. Make sure you proof it well.

HOW TO NAME YOUR ITINERARY FILES

To keep your electronic files organized nicely, here's an example of a file naming convention for travel itineraries. Note: XXXXXX = the 6-digit date

XXXXXX – Location – Name or Initials of Traveler (i.e. 073007 – Tampa FL – JLP)

XXXXXX – Location Event Name of Traveler (i.e. 073007 – Tampa FL IAAP Conv JLP)

In these examples, the beginning date of the trip was July 30, 2007. The destination was Tampa, Florida for an IAAP convention. The traveler's initials were JLP.

When using dates in your file names, consider using full six-digit dates so they always align in order by date. You may also consider starting with a 2-digit or 4-digit year, so you can find things by the year, then the month and day. Using the same sample data from above, that would look like this: 2007 0730 Tampa FL JLP

It may take a few minutes to assemble the information, but sending your executive on business travel with an itinerary is a **HUGE value-add** you can provide your executive(s) and your team as an Administrative Professional.

HAPPY TRAVEL PLANNING!

**For other tips and strategies to make your administrative life easier,
visit our blog at www.AllThingsAdmin.com/blog**

*Julie Perrine CPS/CAP is a personality strategist, personal brand analyst, and administrative mentor who teaches administrative professionals and entrepreneurs how to increase their professional opportunities and achieve more productive and meaningful relationships by utilizing innovative technology, ideas, and people. Learn more and request your **FREE copy of our special report "Creating Your Strategic Administrative Career Plan"** at www.AllThingsAdmin.com*

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Insert company
logo here
(optional)

Executive Name
Company Name Board Meeting
City, State
Travel Itinerary
Month X, 2008 – Month X, 2008

Time:	Event:	Details:
Monday, Month X, 2008		
5:45 AM CST	Car Service Name will pick you up at _____ and transport you to the _____ Airport (XXX – 3 letter airport code here).	Phone: (XXX) XXX-XXXX Confirmation #: XXXXXXXX Paid for with _____ - \$XX
7:05 AM CST	Depart City – Airline Name Flight # XXXX To Chicago, O’Hare Airport (ORD) Flight time: 1 hour	Airlines Phone: (XXX) XXX-XXXX Confirmation Number: XXXXXXXX E-Ticket #: XXXXXX Freq. Flier #: XXXXXXXX Food will NOT be available during flight.
8:05 AM CST	Arrive Chicago O’Hare	
9:00 AM CST	Depart Chicago O’Hare – Airline Name Flight #XX to City, State Flight Time: 9 hours 25 minutes	First Class Seat Food will be served during flight.
2:25 PM HST	Arrive City, State	TIME CHANGE IS X HOURS DIFFERENT FROM CENTRAL TIME.
	Ground Transportation: Car Service Name will provide transportation from the Airport to the _____. The driver will meet you at the gate with a sign with your name.	Telephone: (XXX) XXX-XXXX Cost will be charged directly to _____ account.
	Accommodations: Hotel Name Hotel Address Hotel Address	Resort Telephone: (XXX) XXX-XXXX Confirmation No: XXXXXX \$ XXX.00 USD plus 11.4166% Tax Check In Time: Check Out Time:
Tuesday, Month X, 2008		
	Ground Transportation: Taxi service is available via the valet from the Hotel to the _____ offices.	
	Meeting Location: Company Name Street Address City, State Zip	Corporate Receptionist: (XXX) XXX-XXXX Contact Person’s cell: (XXX) XXX-XXXX ▪ Please check-in with Security on the ground floor with a picture ID to obtain a badge.
7:30 AM HST	Continental Breakfast	
8:00 AM – 9:30 AM HST	Audit Committee Meeting	Attire: Business Casual (no tie or jacket)

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Insert company
logo here
(optional)

Executive Name
Company Name Board Meeting
City, State
Travel Itinerary
Month X, 2008 – Month X, 2008

Time:	Event:	Details:
10:00 AM – 1:30 PM HST	Board of Directors Meeting	
NOON HST	Lunch	
3:00 PM HST	Ground Transportation: Car service by _____ from _____ to the airport.	Cost will be charged directly to _____ account.
5:50 PM HST	Depart City, State – Airline Name Flight # XX To City State (3 digit airport code) Flight time: 8 hours 5 min.	Airlines Phone: 800-433-7300 Confirmation Number: XXXXXXXXX E-Ticket #: XXXXXX Freq. Flier #: AA XXXXXXXX First Class Seat Food will be served during flight.
5:55 AM CST	Arrive City, State	
7:00 AM CST	Depart City, State on Airline Name Flight # XXXX To City State (3 digit airport code)	Food will NOT be served during flight.
7:55 AM CST	Arrive City State – Airport Name	

Name	Office Phone	Cell Phone	Home Phone
Other VPs			
Company Execs			
Admin Assistant's Info			
Key Dept Heads			
ETC			

Consider including the following instructions also:

- How to access voice mail remotely (especially helpful for team members who do NOT travel a lot and may not know how to do this)
- How to login to webmail remotely (if available). Provide the URL they need to get started. Do NOT include their login or password information.

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