

TIME TO FLY

How Progressive Travel Managers See
the TMC Value Proposition in a New
Distribution Landscape

August 2018



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EXECUTIVE SUMMARY

At the end of 2017 the IATA Travel Manager Advisory Groups (TMAG) extended their objective to create a vision for the industry around airline distribution. They decided to focus on a vision of the future value proposition of the Travel Management Company (TMC).

They did this because they consider the TMC to be their most important business partner today and wish to see them continue to play that role. But it also would be fair to say that, broadly speaking, the TMAG participants would like to see the TMC community evolve to create greater value in a new distribution landscape of the future. In short, they see huge potential and want to jointly publish this call to action.

The TMAG operates in both Europe and North America. It was established by IATA in 2015 to provide guidance from travel managers to the association on its New Distribution Capability. This has resulted in a variety of activities including the creation of educational content, design-thinking exercises and whitepapers.

Their initial design-thinking exercise in 2017 resulted in the first “Propathon” and a paper called “*Taking the Reins*”^{*} in which over 60 ideas for new airline products and services were created which

could be fulfilled by airlines using API’s in conjunction with the NDC standard. The TMAG was buoyed by the response to the paper, with Cory Garner, Vice President, Sales and Distribution Strategy at American Airlines stating:

“We received the paper this morning and all 60-plus ideas have been entered into our development pipeline.”

**CORY GARNER,
VICE PRESIDENT, SALES AND
DISTRIBUTION STRATEGY AT
AMERICAN AIRLINES STATING**

So, here we are with Propathon #2, where the TMAG’s travel buyers got thinking to help develop their view of the TMC Value Proposition of the Future in a New Distribution Landscape.

^{*}<https://www.iata.org/whatwedo/airline-distribution/ndc/Documents/ndc-taking-the-reins.pdf>

The ideas generated fell into three broad development areas:

1. **Total Travel Management** – where the buyers believe that the TMC can take on the management of travel more than they do today, such as the management of content based on multi source technology, personalized fare audits and smart contract management.
2. **Real-Time** – where there’s a desire for the trusted business partner to leverage the combination of deeper supply chain relationships, more dynamic technology and better data to support the corporation and buyer along the whole journey, and in real-time.
3. **The Power of Personalization** – where the experiences we have in our consumer lives around personalization can be applied at both the corporate and individual level to drive greater engagement and service satisfaction.

A full list of the ideas generated can be found at the back of this document. And while the actual ideas might be useful to a TMC or any other business travel service provider looking to create value in the intermediary space, it is the potential for true differentiation and the demonstration that travel buyers see value in the development of the TMC proposition which matters the most.

So welcome to the story of Propathon #2, where travel buyers who care decided to help their travel program’s best friend to become even better.



#BFF (BEST FRIENDS FOREVER)

The opportunities to promote direct sales and even consider complete open-booking have never been greater. And yet despite this, we have not seen a movement away from the use of the Travel Management Company.

The introduction of the New Distribution Capability (NDC) by IATA in 2012 created the beginnings of dialogue around the changing distribution ecosystem and the potential impact on the role of key value chain components. The TMC has been a vitally important part of the value chain ever since they emerged in the role of agent for the airline back in the 1950's and 60's. But their role has changed over the decades as the needs of their customers on both sides have evolved.

On the one hand, the corporations for whom they provide services have seen a continued professionalizing of the travel buyer/travel manager role as procurement entered the space with gusto, and this has led to far more sophisticated data services, outsourced travel management functions and the like. But the central TMC role of fulfilling shopping and ticketing requests has stayed pretty much the same.

On the other hand, while the suppliers for whom the TMC sells their product and services have continued to see the TMC as the gateway to customers with volume and high yield potential, they have, at the same time, striven to get closer and closer to those customers to be able to influence their shopping choices. This has, in some instances, led to more direct communication and the lure of the direct booking, challenging the nature of business partnerships in the sector. However, recent distribution changes, the broad use of Application Programming Interfaces (APIs) and NDC distribution in particular, provide an opportunity for the airlines to create a greater connection with the traveler and corporation without having to go direct.



The role of the TMC process to sell, fulfill and support a reservation has fundamentally changed. The question going forward is what will be the role of the TMC for both the airline and the travel buyer?

There is clearly a vast potential and a definite willingness in the industry for the TMC to grow into a highly supportive, dynamic participant. This is great news for our industry and those intermediaries who do wish to enter into a new era, where greater collaboration centred around the traveler and the corporation is key.

“It is clearer than ever that, in order for NDC to bring real value to the corporate buyer, the TMC of the future needs to emerge. We wanted to give some guidance on what the primary areas of importance are and help the TMC community to realize their potential in a new distribution landscape.”

**ANN DERY, GLP, GTP
DIRECTOR, GLOBAL TRAVEL
S&P GLOBAL (CHAIR, TMAG NORAM 2018)**



But before we progress, it is important to revisit the four areas of need for the travel buyer.

We established these in our first Propathon paper (*"Taking the Reins"* white paper, IATA 2017). But another way of looking at these four areas is to say that, in addition to a focus on minimizing cost, the interest of the travel buyer is to derive value from their supplier relationships across the other areas of prioritization, customer, control and care.

Quite clearly, a TMC which can provide valuable services to cater for these areas will be the buyer's (and the airline's) best friend forever - #BFF.

The 4 Areas of Travel Buyer Need

- **Customer** – removing traveler dissatisfaction with the user experience (UX)
- **Control** – stopping lack of effective control on content and channels
- **Care** – plugging the inability to provide appropriate duty of care for their travelers
- **Cost** – curtailing lost savings and lots of time spent on dealing with issues



GETTING TO THE VISION - A PROPA-WHAT?

The formalized objectives of the TMAG were expanded from three to four in 2017. It is this fourth objective which has driven the group of buyers to create their vision of airline products in 2017 and this vision of the TMC Value Proposition today.

IATA Travel Manager Advisory Group Objectives

1. Act as a sounding board for IATA to present updates and insights on new initiatives which may affect the corporate market including NDC and related activities.
2. Maintain a dialogue with IATA through TMAG on issues affecting corporate travel programs (“managed travel pain-points”).
3. Act as a communication channel between IATA and other bodies on which participants are members of (e.g. associations, benchmark groups and committees).
4. **Provide voluntary and non-binding ideas, suggestions and create a vision to assist the industry in adopting and benefitting from NDC-enabled technologies and solutions.**

Creating a Propathon

The success of the 2017 Propathon and resultant white paper inspired the TMAG to organize a similar idea generation session in 2018.

The travel buyers all committed to a 24-hour period where they would help to create clarity around which TMC products and services the buyer of the future would value.

So, the second Propathon was born, a joined-up process with the following phases:

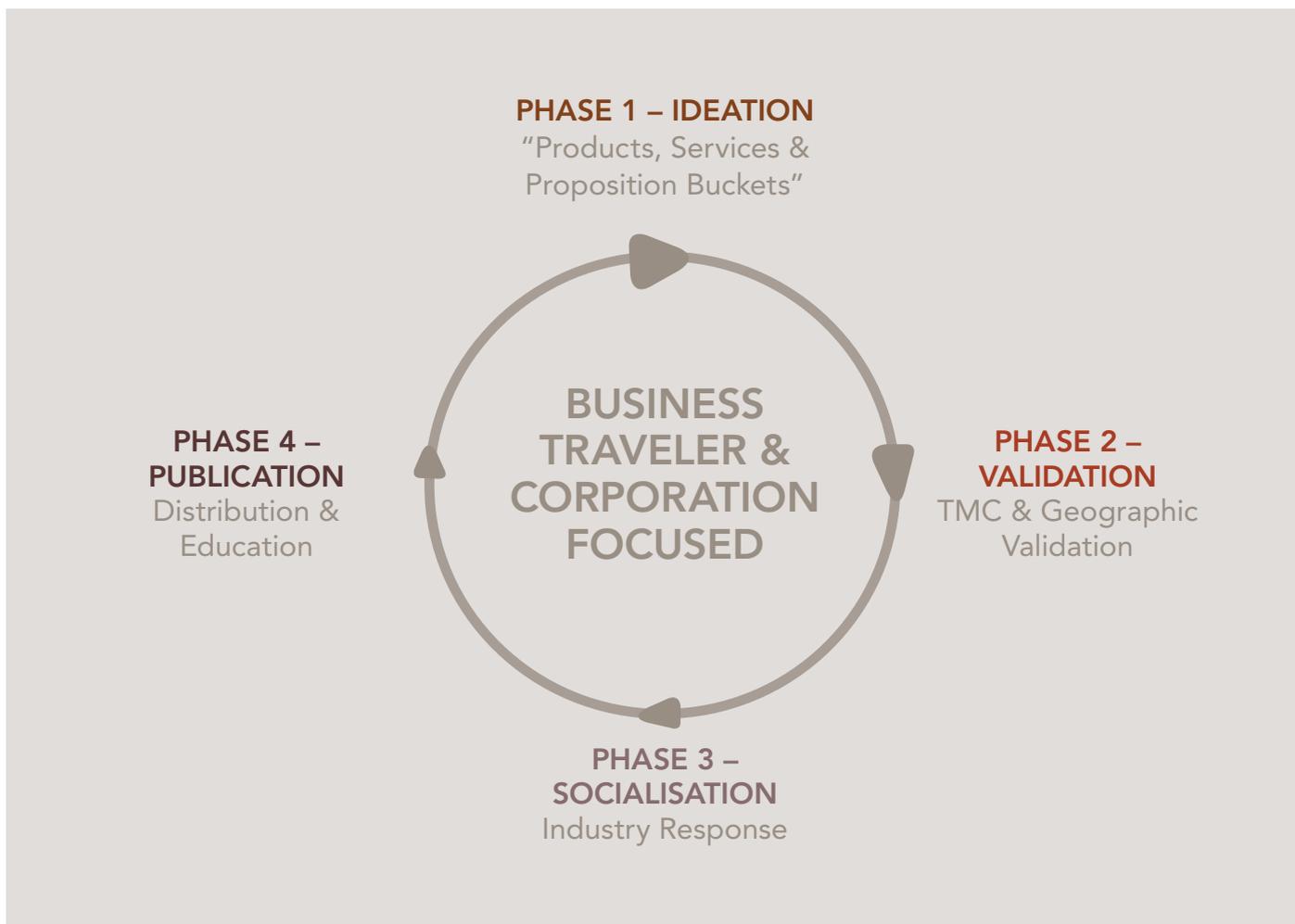
Propathon

/ˈprɒpəθ(ə)n/

noun

1. an event, typically lasting 24 hours, in which a group of people meet to engage in the collaborative design of new product and service ideas.
2. a proposition marathon.
"A series of 24-hour propathons to build new customer-focused services"

See also: **Hackathon**



Phase 1 – step 1: Ideation

An eight-hour period where European Travel Managers from the TMAG created ideas for new TMC products and services, in the context of the original five core principles from Propathon #1 and an additional two principles, and then prioritized and clustered them.

A total of 46 ideas were created, with 22 prioritized. The group also considered headwinds and tailwinds that could influence the development of such products and services.

PHASE 1 – STEP 1: IDEATION

Phase 2 – step 1: Validation

At the end of the eight-hour period, two pre-selected TMCs were sent the ideas by e-mail, their role being to review them overnight, before review meetings first thing the next morning. The two TMCs, Clarity and FCM were invited to attend in order to provide their perspectives on the future value proposition of the TMC and to validate that the ideas generated “made sense”.

PHASE 2 – STEP 1: VALIDATION

Phase 3 – Socialization

The full output of Phases 1 & 2 was collated into a presentation and then subsequently delivered to IATA's AIR Business Travel Summit (bringing together a total of over 150 representatives from corporate buyers, travel management companies (TMCs), self-booking tools (SBT), airlines and IT providers for further validation.

This group was asked to a.) prioritize the area of most importance and b.) provide perspectives on any areas which may have been overlooked in the process.

PHASE 3 – SOCIALIZATION

Phase 2 – step 2: Validation II

Once fully written up, the ideas were sent to the North American TMAG in advance of a meeting in New York. At the beginning of this second part of the Validation phase, the North American Travel Managers provided validation of the ideas generated to date.

Following that, representatives from a further two TMCs, Travel & Transport and Carlson Wagonlit Travel, were invited to share their perspectives.

PHASE 2 – STEP 2: VALIDATION II

Phase 4 – This document

This paper, which covers the process, output of the Propathon and some analysis, is a first step in creating wider dialogue for new service areas and a revenue sources for the TMC community, generated through the eyes of the customer as buyer.

It is intended to drive interest and debate into what types of products and services travel buyers and their travelers would derive value from; initiate the dialogue between buyers, TMCs and the remainder of the value chain; and to demonstrate that for these travel buyers, there is a real interest in the potential for an enhanced TMC role.

PHASE 4 - THIS DOCUMENT



The Principles Under Which the Travel Managers Created Their Ideas

1. We want to source end to end
2. We recognize the importance of a B2B2C relationship
3. Services may be charged for or negotiated as added value (corporate recognition)
4. Services are Corporate Traveller & Corporation focused
5. Payment may be corporate OR traveller (if personal aid) subject to policy controls
6. **We believe this approach will support the TMC buy from commodity to a strategic relationship**
7. **The Traveller is a mutual client of corporate, TMC and the wider Traveller Ecosystem**



TMC SERVICE IDEAS IN A NEW DISTRIBUTION LANDSCAPE

The initial products and services developed and prioritized in **Phase 1** fell into three broad categories we will explore shortly. These were:

TOTAL MANAGEMENT

REAL-TIME

THE POWER OF PERSONALIZATION

Initially, the ideas were sorted along the traditional travel management timeline, from plan to book, pre-trip, on-trip and expense, but it was these three “buckets of value” that emerged strongly. It’s important to note these were created bottom up, ideas first and then the pattern of three key themes emerged (vs delivering against pre-conceived ideas).

The full list of product and service ideas can be found at the end of this paper, but we have selected an example of the highest voted service proposition for each category to demonstrate the quality and breadth of ideas born out of the Propathon.

- **Category: Total Management**

Product Reference Name	Multi-Source TMC
Description	Manage content based on multi-source technology - present with a complete/perfect search (output: eradicate “I can get this cheaper online” and move to a price promise model)
Value	Corporate servicing, traveler confidence and airline revenue integrity

- **Category: Real-Time**

Product Reference Name	Trip Disruption
Description	Trip Disruption - better management of/proactive and complete E2E ownership of disruption including linkage back to suppliers
Value	Corporation duty of care, traveler servicing at peak point, airline relationship with customer and co-ordination with other complimentary suppliers

- **Category: Power of Personalization**

Product Reference Name	Traveler Segmentation Services
Description	Traveler segmentation services – TMCs become experts on traveler types to negotiate bundled airline offers on behalf of clients
Value	Tailored traveler experiences, new corporate procurement value and airline product creation and streamlined delivery

Plus... The Data Lake



During the validation phase at the IATA AIR Business Travel Summit 2018, it was clear that other areas of value were key to people in the audience and a further 56 submissions identified -- in particular that data, ensuring no bias in content, mobile, lodging aggregation, auto-recovery and simplification were equally as key.

There's no question that data capabilities are key and the number of responses in the submissions which resulted in this being the most prominent value proposition speaks for itself. You could argue that data capability is an underpinning requirement to support the overall value proposition of the future and is behind some of the ideas generated, but that it doesn't stand alone as a potential servicing area.

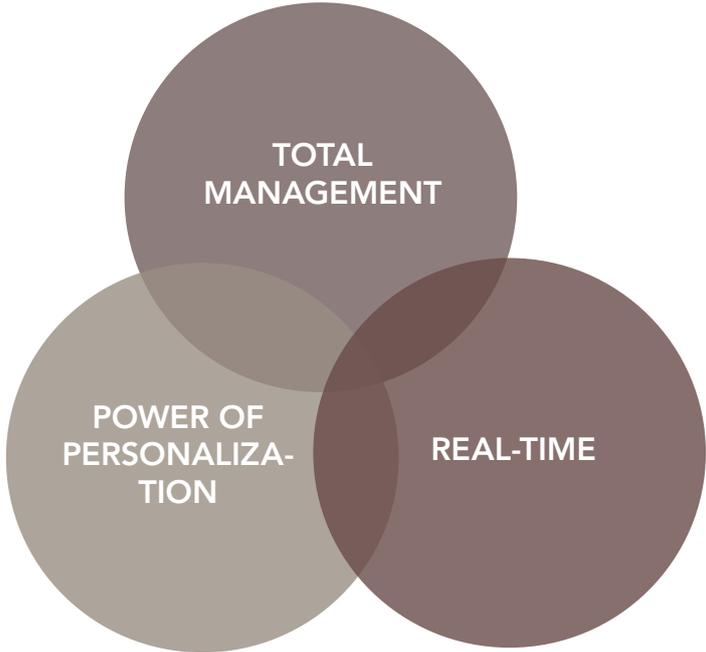
But if the TMC of the future were, for example, to build data warehousing for far more sophisticated traveler profiles to drive personalization you could easily argue that it is a valuable differentiator in its own right.

We felt that other areas submitted through the validation exercise, with the exception of lodging aggregation, generally fit alongside or within existing ideas created through the Propathon. The question of a value proposition for lodging aggregation falls outside the scope of focus on airline related services, but we recognize that in a world where bundled services are key this would naturally play a role.



THE BUCKETS OF TMC VALUE IN THE FUTURE

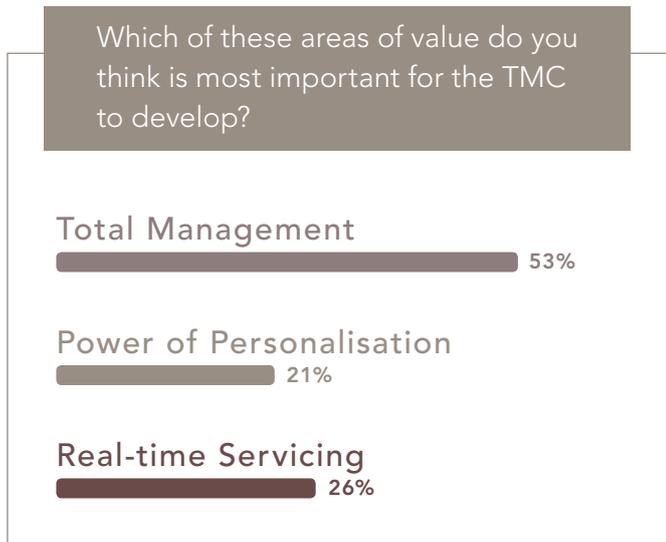
Aside from the ideas themselves, what most clearly emerged through the exercise was the clustering of value around three clear areas. These three “buckets of value” were what shaped the discussions with the four TMCs which participated in the exercise.



The combination of the level of skill and the tools to provide **Total Management** were seen as a real focus for the travel managers and this also tended to feature heavily in all the TMC discussions.

With the exception of multi-source content, the majority of areas focused on within this Total Management bucket were propositions which TMCs have to some extent started developing in their consulting divisions, from program management outsourcing, wellbeing to compliance, and from policy to data strategy.

Multi-source content featured as the most highly voted item in the Propathon ideation phase, and also in the validation phase with the IATA AIR Business Travel Summit 2018. Of course, there's a chance that this could be a result of special interest in the subject from these particular participants. It is more likely, however, that the combination of full content and these other Total Management services creates a powerful and attractive proposition to all in the value chain.



RESPONSES FROM THE DELEGATION AT IATA AIR BUSINESS TRAVEL SUMMIT 2018

In addition, the multi-source content underpins the ability of the TMC of the future to deliver the **Power of Personalization** and **Real-time** servicing. Regardless of the need for existing core air and hotel products, the personalized approach with real-time capability to service will require products and services far beyond air. This highlights the interdependency between the three buckets of value and the fourth bucket, The **Data Lake**, and the need for the TMC of the future to consider all areas rather than focusing on just one.

A good example of this can be seen when we consider the number one voted Power of Personalization item, traveler segmentation services. A TMC can spend time analyzing the travelers of a single corporation or trends across their whole client base to identify traveler types. This would then lead to discussion with the airline on potential products to service these travelers. That would likely mean special fare families and, potentially, bundled products (either by the airline or potentially by the TMC and/or their aggregator). So, while the segmenting of travelers can be done independently, the delivery of personalized fares by traveler type would require multi-source content (Total Management), the effective use of traveler profiles and product matching (The Data Lake), delivered in a contextual and ever-changing environment (Real-time). This demonstrates the potential complexity and also shows why such a development by TMCs into this space is so desirable by the corporate travel managers.

They wish the experience to be akin to the quote by Caroline Strachan at Festive Road.
 "Know me. Be Where I am. Tell me only what I need to know."



HEADWINDS & TAILWINDS FOR SUCCESS

For each of the buckets of value there are forces for the development of the TMCs and against it.

Tailwinds

The following factors were identified as likely to drive the TMC value proposition in this direction.

- **Follow the Money** – Total Management drives revenue and a tangible return on investment. Greater traveler value through enhanced offerings and personalization will create more willingness to pay. There appears to be a market appetite to move away from a commoditized service to something of value.
- **Position in the Chain** – The TMC's position in the value chain is enviable and not to be underestimated. New entrant technology into business travel often finds its best approach to market penetration through this community as they work on behalf of the high yield, volume travel customers.
- **General Trends** – The retailing revolution, a general continuing trend of outsourcing, more mobile capability, AI and the dramatic growth of the API economy means that this is happening all around us already and customer expectations are moving with it.

Headwinds

The following existing factors were identified as likely to hinder the TMC value proposition in this direction.

- **The Will, Skill & Bill** – As we have previously mentioned, a key focus of the Propathon was to recognize that to create this change will take more than investment from the TMC. The desire to go there coupled with the need for a new skillset and all of this in parallel with the same need on the buyer side should not be underestimated.
- **The Trust Factor** – There's no question that trust along the whole value chain has suffered as change enters our industry. Innovators are disruptors and disruption carries both negative and positive attributes. What is great for some is often bad for the others. The need to get better at communicating in our industry and build trust is palpable.
- **Timing is Everything** – The willingness of the buyers to adopt, the critical moments of infrastructure change, the investment points needed for scaling out projects/releases and the evolution of buyer and traveler needs. Getting the timing right is critical.



These broad areas represent the thinking of the buyers who participated in the Propathon, but it is important to point out another key tailwind, that of first mover advantage. TMC sourcing processes are beginning to change due to dissatisfaction in the existing Request for Proposal (RFP) process. New ways of sourcing are beginning to emerge

and with TMC sourcing cycles every 3 to 5 years there's a real interest in the many sourcing exercises which occur every year to look for something new.

Let's face it, it's why the buyers on the TMAG wished to consider the future TMC Value Proposition as the focus of their next Propathon and why this paper exists. And there are developments in the TMC space which are beginning to get attention and shift buyer interest. So the behaviour of progressive TMCs themselves will more likely drive faster change.

In the words of the TMAG during the Propathon:

"Trust is key. But so is the will, skill and knowing someone has to pay the bill in both the buyer and TMC communities".



DEMONSTRATING DIFFERENTIATION

To own or not to own,
that is the question.

One thing that emerged from the discussions with the TMCs was the difference between the travel management company approaches to technology and content sourcing. This differentiation has subsequently been borne out with updates from TMCs at the IATA AIR Business Travel Summit 2018.

When it comes to air content, the mega TMCs are, by and large, unequivocally looking to their existing aggregator partners to bridge the content sourcing gap and to provide the kind of capabilities which are featured in this document. So too, of course are many of the other TMCs at different scale, so it is not limited to the megas.

But among the independents we can see for some a desire for greater ownership of the TMC tech stack as a way to get the type of content they want and to drive the type of servicing they wish to provide. In some ways this may represent the fact that airline distribution of content may become more selective. And the smaller TMCs need to be more agile to maintain competitive advantage with the larger agencies. It could be for other reasons, but the observation from this exercise is

“It’s a really interesting time to pause and take stock of the continued globalization of travel servicing / suppliers and ask yourself, with all the changes in technology and traveler needs, whether one global provider is the optimum solution any more. I don’t think it’s a given that it is best practice, it totally depends on the culture, capabilities and commercial relationship you’re looking for.”

DIANE LUNDEEN-SMITH, GLOBAL TRAVEL SOURCING MANAGER, MICROSOFT AT THE IATA AIR BUSINESS TRAVEL SUMMIT 2018.

interesting because it demonstrates that we are about to start seeing greater differentiation in the TMCs of the future.

This doesn’t mean, of course that we can say one type of TMC is doing this and another type is doing that, but it does mean that there are differing models of TMCs emerging and this will accelerate differentiation in this sector.

TMC Tech Stack Models

The present environment leaves us with four potential TMC technology scenarios when it comes to sourcing content and we could presently allocate all of the TMCs into these models. And as we said earlier in this paper, the reason why identifying these models is important is because they will fundamentally underpin the TMC value proposition of the future across the areas the travel buyers in the Propathon identified as important. Therefore, the propathon participants felt strongly that tech stack knowledge should be increased in the buyer community and form part of TMC RFP decision making criteria.

GDS-based IT

Waiting for existing provider readiness (aggregation and agency desktop)

Moving slower because of large and complex IT, current incentive model

Other 3rd party-based IT

Want to evolve IT and commercial model, using 3rd party providers

Sense of urgency due to content differentiation

Insourced IT

Consider themselves as IT players and have built own platform

Moving fast, new commercial models, addressing NDC opportunities

Note: While there will be some TMCs that fit squarely into one of these technology model categories, the likelihood is that most TMCs will fall into a fourth "hybrid" model. These hybrid models will feature one of the models above as their primary source of technology, but will also include elements of technology from one or more of the other categories.

CONCLUSION

The demand for an enhanced value proposition by buyers across **Total Management, Real-time** and the **Power of Personalization**, underpinned by **sophisticated data capabilities** (The Data Lake) and coupled with the emergence of **TMC tech stack** models means that the landscape for greater TMC differentiation is set.

This is welcome news to everyone in the value chain as it will create more choice and greater synergies between travel programmes and their most trusted partner.

But that means that there's a real need to ensure this differentiation is demonstrated at the sourcing stage for the buyers to find the right partner. Whether the existing RFP process or templates provide this is questionable. The need for a different approach to identify the corporate travel buyers' optimum partner is clear, as once that important partner is in place, it needs to be one which can work together towards an amazing TMC value proposition of the future and a happy corporate travel programme with happy travelers. That requires a shared vision and a relationship which will develop together.

We hope this paper has been useful in helping you identify the areas where the TMC can support the travel program of the future. So, if you are attracted to the areas of defined value in this paper then start talking to your TMC partner about their development pathway or if you're a TMC, take a look at your planned future and judge whether it matches the vision of these buyers.

While you may not align with all of the positions in this document, we hope you will agree with the Propathon participants that the idea of supporting the development of TMC excellence and enhancing the value proposition of this important partner are absolutely vital, and maybe you'll run your own design-thinking exercise and come up with a list we haven't thought of and create even more differentiation.

Either way, the market wins.

OUR SINCERE THANKS

TO THE FOLLOWING PROPATHON PARTICIPANTS...

The Propathon Creatives...

Ann Dery	S&P Global
Claudia Adams	Allianz
Darragh Ormsby	Google
Diane Lundeen Smith	Microsoft
Donna Cooley	Boeing
Greg Acha	Amazon
Jennifer Keltner	Toyota
Marc Zuber	Nestle
Michelle Hunt	DHL
Pascal Struyve	Ingersol Rand
Rosanna Fiorin	Government Services Canada
Shari Quackenbush	IBM
Caroline Strachan	Festive Road
Lora Ellis	Festive Road
Paul Tilstone	Festive Road
Cécile Rousseau	IATA
Yanik Hoyles	IATA

And the remainder of the Travel Manager Advisory Group participants who cannot be listed due to corporate press restrictions or were unable to attend the Propathon due to work commitments.

The Propathon Result Reviewers...

The team at	Clarity
The team at	FCM
The team at	Travel & Transport
The team at	CWT

Our thanks also to all 153 invited delegates at IATA's AIR Business Travel Summit 2018, which included over 40 corporate travel buyers and association heads and over 22 TMC leaders.

And of course...YOU, because the journey is only just beginning and if you have read this far then you clearly have something to contribute too.

This paper was written by Paul Tilstone, managing partner, Festive Road and edited by Caroline Strachan, managing partner, Festive Road and the IATA NDC Team.

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Want to know more about IATA's New Distribution Capability and how it will affect the business travel industry? – visit www.iata.org/ndc.

APPENDIX 1 - THE 24 TMAG IDEAS WITH VOTES, GROUPED BY VALUE AREA AND IN ORDER OF VOTES CAST (MOST TO LEAST)

The Power of Personalization

Ref.	Title	Description	Grouping
1	Traveler Segmentation	Traveler segmentation services – TMCs become experts on traveler types to negotiate bundled airline offers on behalf of clients	Power of Personalization
2	Learned Behaviour	Enhanced preferencing based on past travel & preferences	Power of Personalization
3	POS Gamification	Incentive management - bank of points for traveler use	Power of Personalization
4	Loyalty Management	Traveler level loyalty management – TMC to consolidate programmes and advise on optimum pathways within defined preferred partners	Power of Personalization
5	TMC Fast track	Fast track - prepaid at airport	Power of Personalization
6	TMC Loyalty Scheme	TMC loyalty scheme - more loyal to the TMC than the airline/hotels – potential override to change behaviours	Power of Personalization
7	Programme Marketing Services	Tailored rich content with corporate branding - sales/marketing by TMC - technical ability & agents shift to sales people	Power of Personalization

Real-Time

Ref.	Title	Description	Grouping
8	Trip Disruption	Trip Disruption - better management of/ proactive and complete E2E ownership of disruption including linkage back to suppliers	Real time
9	Travel Buddy 1	Dynamic/contextual travel bot/voice - watch your travel behaviours and offer support	Real time
10	Travel Buddy 2	Travel comms assistant - constant reminders/guide for your trip. Check in now, go to the airport now	Real time
11	Programme EWS	Programme resilience - like a programme management early warning system that action needs to be taken (and overlay qualitative insights)	Real time
12	Be Where I am	Be where I am and be more accessible - whether its Slack, Microsoft Outlook, Facebook Messenger, Alexa/Google Home, etc.	Real time
13	TMC Wiki	"Vikki the Wiki" - better traveler guidance/source of travel information	Real time

Total Management

Ref.	Title	Description	Grouping
14	Multi-Source TMC	Manage content based on multi source technology - present with a complete/perfect search (output: eradicate "I can get this cheaper online" and move to a price promise model)	Total Management
15	Do-it-all	Outsourced Travel Management/Travel as a Managed Service - everything sourcing/demand/operations. Corporate creates strategy and TMC does everything else	Total Management
16	Contract Manager	Smart agent desktop - shifts volume based on contract commitments	Total Management
17	Data Protect	Managing data in the GDPR world	Total Management
18	Personalized Fare Audit	Real time fare auditing - anonymized shopping to judge impact of personalization	Total Management
19	Treasury Management	Dynamic payment provision - treasury management at POS with all options considered	Total Management
20	Wellbeing Rating	Traveler Wellbeing rating - based on hours of long haul, time zones, nights away from home etc.	Total Management
21	Compliance rating	Traveler compliance rating vs policy perimeters	Total Management
22	Policy Impact Benchmarking	Policy benchmarking - multi dimension cost/employee experience	Total Management
23	Centralized Data	Data pooling/management - truly comparable buyer/seller data	Total Management
24	Consumption Strategy	Flexible travel policy management - more dynamic application via a rules engine	Total Management

APPENDIX 2 - THE 22 TMAG IDEAS WHICH DID NOT ATTRACT VOTES

Ref.	Draft Idea
25	Insights & Benchmarking - provided back to buyer as standard
26	VIP servicing - remains important
27	Concierge level servicing - beyond VIP today
28	Auto book hotel based on previous bookings
29	Insights & Benchmarking provided at POS to traveler
30	Where to meet - route & location optimization for small+ groups
31	Real time & constant traveler feedback
32	Productivity - analytics and reporting on missed productivity
33	Short-haul: pack together different supplier value propositions and ensure you have everything you qualify, i.e. guaranteed overhead luggage space
34	Transparency in supplier offer - based on TMC deals/rebates
35	Enhanced data pull across into expense system
36	Build proprietary booking tools to own booking interface - across multi-channel
37	Calendar triggered travel planning reminders
38	On trip travel support – offering, booking restaurants, taxis, etc.
39	Wholesale rate negotiation
40	Manage spend based on KPIs/budgets
41	Distressed inventory - managing tactical offers
42	Follow the sun - 24/7 servicing. Complete consistency globally no matter POS/POO
43	Book by actual seat available - not just general availability
44	Extend services to expense submission/management of
45	Better actual guidance on visas, locations, traveler safety, etc.
46	Tell me what I need to know only when I need to know - e.g. China needs laptop encryption only when I book to go to China

