

## How modern is your travel operating model?

For each dimension, select the description that best matches your current state. There are no “right” answers, only signals about where your operating model is helping you, and where it’s creating friction.

Select one option per dimension · Score each 1, 2, or 3 · Total your score on page 3

### 01 Connectivity:

Do changes made anywhere stay true everywhere?

YOUR SCORE

**1 pt.**

#### Fragmented

Changes made in one system routinely break another. Bookings, changes, approvals, expense, and reporting operate as separate workflows.

**2 pts.**

#### Partially connected

Some integrations exist, but manual reconciliation is required. Data timing and structure vary by channel or supplier.

**3 pts.**

#### Fully connected

Any change propagates automatically across systems. There is one consistent version of the trip and the transaction.

### 02 Automation:

Are workflows doing the work or are people?

YOUR SCORE

**1 pt.**

#### Manual / reactive

Agents, analysts, and managers intervene constantly. Exceptions are common, expected, and handled case by case.

**2 pts.**

#### Rule assisted

Basic automation exists, but exceptions still trigger human effort. Teams spend time monitoring, correcting, and following up.

**3 pts.**

#### Workflow driven

Policy, approvals, exchanges, unused value, and reporting run automatically. Human effort is reserved for true edge cases.

### 03 Data integrity:

How much do you trust your travel data without cleanup?

YOUR SCORE

**1 pt.**

#### Unreliable

Reports require reconciliation and explanation. Leadership questions accuracy, timing, or completeness.

**2 pts.**

#### Mostly usable

Core metrics are directionally correct, but lagging. Manual adjustments are common before sharing data.

**3 pts.**

#### Finance grade

Data is timely, complete, and consistent by design. Reporting can be trusted immediately—no interpretation is required.

### 04 Policy effectiveness:

Is compliance enforced or designed into the experience?

YOUR SCORE

**1 pt.**

#### Policed

Compliance relies on approvals, audits, and after-the-fact correction. Out-of-policy bookings are frequent.

**2 pts.**

#### Guided

Policy influences behavior, but still requires enforcement. Exceptions are visible but not always preventable.

**3 pts.**

#### Embedded

Travelers see compliant options without friction—compliance happens naturally.

### 05 Operational load:

How much effort does travel create for your team?

YOUR SCORE

**1 pt.**

#### High friction

Constant escalations, follow-ups, and fire drills. Travel generates work instead of disappearing into the background.

**2 pts.**

#### Manageable

The program functions, but requires ongoing attention. Operational effort scales with volume.

**3 pts.**

#### Low friction

Most trips complete without intervention. The program scales without increasing headcount or complexity.

### 06 Trust and transparency:

Can stakeholders see and trust what's happening?

YOUR SCORE

**1 pt.**

#### Opaque

Costs, service drivers, and outcomes are hard to explain. Stakeholders rely on summaries, not evidence.

**2 pts.**

#### Partially transparent

Some visibility exists, but details are fragmented. Trust depends on interpretation.

**3 pts.**

#### Inherently transparent

What happened, why, and what it cost is always clear, without interpretation or reconciliation. Trust is built in.

# What this scorecard reveals

Your total score places your travel program in one of three operating model states:

## 6–9

### Service dependent

Travel works but only because people are constantly intervening. Manual effort, exceptions, and reconciliation are built into daily operations.

## 10–14

### Patchwork

Parts of the program are modern, but gaps between systems create friction. Progress exists, yet outcomes still depend on workarounds.

## 15–18

### Connected

Your program behaves like infrastructure. Workflows are automated, data is trustworthy, and outcomes are designed, not managed.

## What to do next

Use this score to identify where your operating model creates friction and where modernization will have the greatest impact.

Share the results with finance, procurement, and leadership to align priorities before considering solutions. Combine it with the [Reactive vs. Predictive Travel KPI Checklist](#) for a complete view of your model score, which reveals how your program is built. Your KPIs show how that design performs daily, clarifying not just what's broken, but why.

This rubric isn't measuring vendor features or UI polish; it's measuring how your travel program runs. A low score doesn't mean your team is failing. It means your operating model is carrying a hidden operational load, while a higher score reflects fewer handoffs, exceptions, and manual effort required to keep the program running. Modernization isn't about replacing a tool. It's about reducing friction, uncertainty, and reactive work until travel stops creating work.

**The goal:** Create a travel operating model that works by default—not one maintained by extra effort.