



Certify Travel  
Customer Launch Kit

# Table of Contents

- Dear Customer..... 3
- Leisure Travel Booking vs. Managed Travel Booking..... 4
- Best Practices for Company Rollouts..... 5
- The Art of Change Management ..... 6
- Basic Administrator Tasks..... 7
- Common Questions Referred to the TMC/Admin ..... 8
- Submitting Support Tickets ..... 9
- Tips & Tricks for Using Certify Travel .....10
- Free Training Resources .....11
- Pre-Launch Reminders .....12
- A Managed Travel Solution .....13
- Your Team at Certify Travel .....14

## Dear Customer...

Thank you for your business!

Now that you have completed implementation, you are ready to roll Certify Travel out to the rest of your company.

This Launch Kit is to help provide a successful launch based on our past customers' experiences and best practices from the Certify Customer Success Team.

The team includes your Customer Success Managers, Implementation Specialists, Support Experts, and Trainers. We have seen it all!

Please use this kit any way you need. We have reminders, links and directions for other materials, recommended best practices, and general tips.

**Welcome aboard!**

*Certify Customer Success*

# Leisure Travel Booking vs. Managed Travel Booking

## Leisure Travel Booking:

Often on popular websites, such as *Expedia*, *Hotels.com*, and *Travelocity*, booking on a leisure site does not have restrictions for costs or other travel rules. Travelers have freedom over all options that they see. Many leisure booking websites do have extra fees that the website collects. Search results usually do not include direct-booking vendors, such as *Air Canada*, *Southwest Airlines*, and *JetBlue*.

## Managed Travel Booking:

Managed travel tools offer built-in policy compliance. They allow travelers flexibility to book their own travel, while still enforcing spend control set by their organization. For example, travelers may notice out-of-policy flags on options among search results, in addition to in-policy options. Trip authorization is also built-in, allowing pre-trip approval. Managed travel tools also pull search results from Global Distribution Systems (GDS), which include hundreds of connections to the majority of the world's airlines, hotels, and car vendors.



*We recommend transparency and communicating these differences to users prior to launching Certify Travel. We answer many traveler questions regarding cheaper fares and rates on leisure booking sites and wondering why they should book on Certify Travel if it looks more expensive.*

*Though you know the great benefits of a new tool, many times, most end users do not. Let them know that there are built-in policies and preferences that drive their search results to ensure compliance for the corporation.*

# Best Practices for Company Rollouts



## Communicate.

No one likes change - we know. On top of change, no one wants to be surprised by it. Relay the message that a new (great!) system is coming – early and often. The more that you communicate, the less resistance you'll experience.



## Be Positive.

Implementing a new system for a whole company can be frustrating and a LOT of work on you. Positivity and negativity run from the top down. Keep the message clear that the new process will make things easier and will be a positive change.



## Be Clear.

Define your travel policies and make them known and clear. While learning a new process, users will at least be familiar with the rules.



## Require Training.

Set a date (or a few) in which all users should have attended Certify Travel Training Camp and ask your Customer Success Manager or Certify Travel Support to provide an attendance list for you to reference.



## Pilot.

A pilot group is beneficial in all areas. Not only do they give you the first impression of the new system, but they also may identify things you may not have thought of. Let the pilot group work out the kinks.

# The Art of Change Management



The success of your rollout depends on two things: learning how to use the new system and changing old habits.

Certify Travel is an “end-user” based system. This means that the travelers do a little work, approvers do a little work, administrators do a little work, and ultimately, it’s less work for everyone.

We can take care of the “how to use it” part, but the real change management takes place with you – enforcing the use of the new system and the correct resources for help.

**Our best advice: let employees correct their own errors, complete their own profiles, and book themselves.**

Disapprove a trip if needed, inquire if an itinerary looks odd, and direct technical questions to Certify Support. It is up to the Approvers and Administrators to help enforce the behavior change to really see the value of Certify Travel.

Identifying the best help resources for your team is another piece of change management. Communicate and build trust within your organization that everyone is on board with the new system and introduce the internal administrator and/or Travel Management Company as a first stop for help (also see our [list of common TMC questions](#) within this launch kit). This will build confidence amongst users that hey - it’s okay to ask for help! Leading them to the right place when questions and issues arise will make it easier for everyone.

If your administrator is stumped on a system issue, send them over to us! Our Support team offers a completely different level of customer service. They know all the tips and tricks, current issues/bugs and handy workarounds, and are truly the experts. If you get stuck – send in a ticket, send a smoke signal; we can help!

# Basic Administrator Tasks

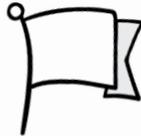


Within Certify Travel, there are several administrative functions available for easy and continual maintenance. Here are a few recommended articles:

- [Adding a New Travel User](#)
- [Assigning Travelers to a New Travel Policy](#)
- [Viewing Unused Tickets for All Travelers](#)
- [Running Travel Reports](#)
- [Establishing Trip Approval](#)
- [Assigning Travel Planners](#)

# Common Questions Referred to the TMC/Admin

Depending on the question, Certify Travel Support will refer travelers to ask their question internally at your organization or Travel Management Company. Certify Travel is the vessel, but you make the rules.



These are common questions that we answer with, *“It would be best to confirm with your Travel Administrator.”*

## **When Users Can Login**

*Can I start using it NOW?*

## **Flight Changes**

*Can you help me change my flight after the ticket has been issued?*

*Can you help me change my flight during travel?*

## **Credits**

*How do I use a credit on a new reservation?*

## **Visa/Passport/TSA Numbers**

*My reservation is not accepting my visa/passport/TSA number.*

## **Upgrades Groups**

*I have a promo code for an upgrade – can I use it?*

## **Groups**

*I need to make a reservation for a group.*

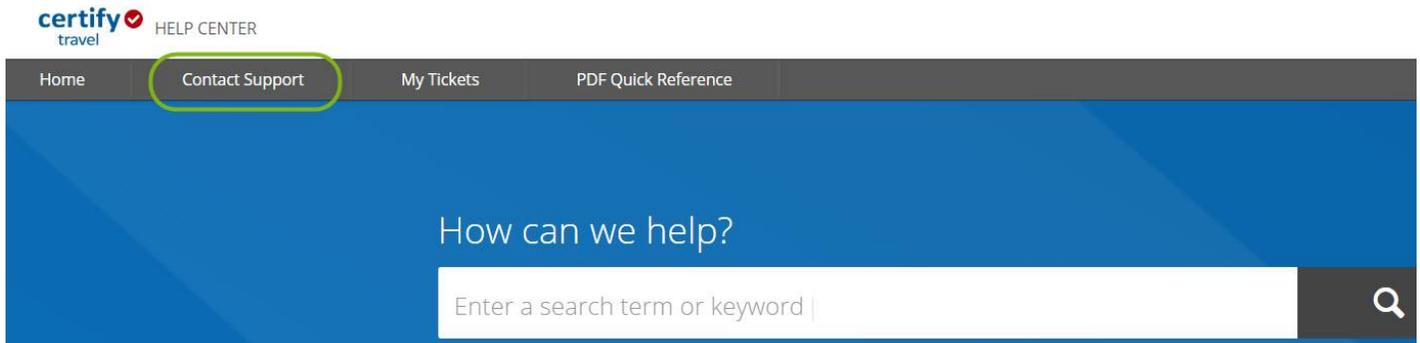
## **Special Requests**

*Was my special request fulfilled?*

# Submitting Support Tickets

Utilize **Certify Travel Support** for any technical issues experienced while using the tool.

**Step 1:** From [help.certifytravel.com](https://help.certifytravel.com), click **Contact Support**.



**Step 2:** Complete the form and click **Submit**. You'll receive a response shortly!

[Certify Travel](#) / [Submit a request](#)

## Contact Support

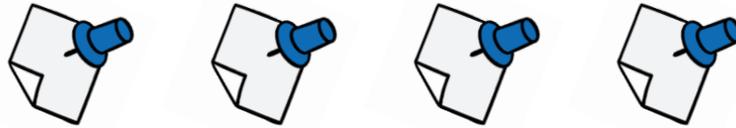
Ask us a question or describe the issue you are experiencing. Include examples if possible.

A screenshot of the 'Contact Support' form. The form is white with a light grey border. It contains several input fields: 'Your email address \*' with the value 'traveladmin@travel.com', 'Subject \*' with the value 'Reset password', and 'Description \*' with the value 'Hi, could you please reset the password for my employee?'. Below these fields is a small note: 'Please enter the details of your request. A member of our support team will respond as soon as possible.' Further down are fields for 'Company Name' (value: 'Best Travel Company'), 'Traveler's Name' (value: 'Liz Traveler'), and 'Attachments' (with a button 'Add file or drop files here'). A blue 'Submit' button is located at the bottom right of the form, circled in green.

Alternatively, you may email [support@certifytravel.com](mailto:support@certifytravel.com) to create a ticket.

**Travel Management Companies** may view their existing, open tickets by logging into <https://help.certifytravel.com/access/normal>.

# Tips & Tricks for Using Certify Travel



## Mobile App

To use the Certify Travel mobile app, travelers will need to [register a new account on the app](#) using their email address. Be sure to distribute the unique company name, given during your implementation, as it is required to complete registration.

## Email/Spam Filters

For corporations using trip authorization, make sure that authorizers check their spam/quarantine folders just in case approval emails land there.

## Reservation Issues

For issues after successfully booking online, travelers should contact their travel agency.

For technical issues while using the Certify Travel booking tool, please contact Certify Travel Support directly via a support ticket.

## Search Results

By utilizing a lowest-fare shopping engine, we can return the lowest logical fares for any search request based on the traveler's travel preferences and company policy. More expensive flights may not return in search results, which ensures that the tool is presenting the lowest-fare options. By narrowing search criteria and modifying the travelers' travel preferences, search results will show more expensive flights if required.

# Free Training Resources



## Recorded Training

Led by an instructor, learn best practices for booking as well as reviewing analytics.



## Tutorial Videos

Time crunch? Watch these quick tutorial videos and be on your way!

- [Creating your Travel Profile](#)
- [Booking Travel](#)
- [Approving Travel](#)
- [Administrator Tools](#)



## Help Center

Bookmark a few articles in our [Help Center](#) with screenshots for repetitive tasks.

**Great, but... where do I start?** ↩

↩ <https://help.certifytravel.com/hc/en-us/articles/360017676553-Getting-Started-with-Certify-Travel> ↩

# Pre-Launch Reminders



**Enter travel assistance contact information:**



For Technical Assistance contact [redacted]  
Phone: [redacted]  
Email: [redacted]



**Send early communication prior to release date**

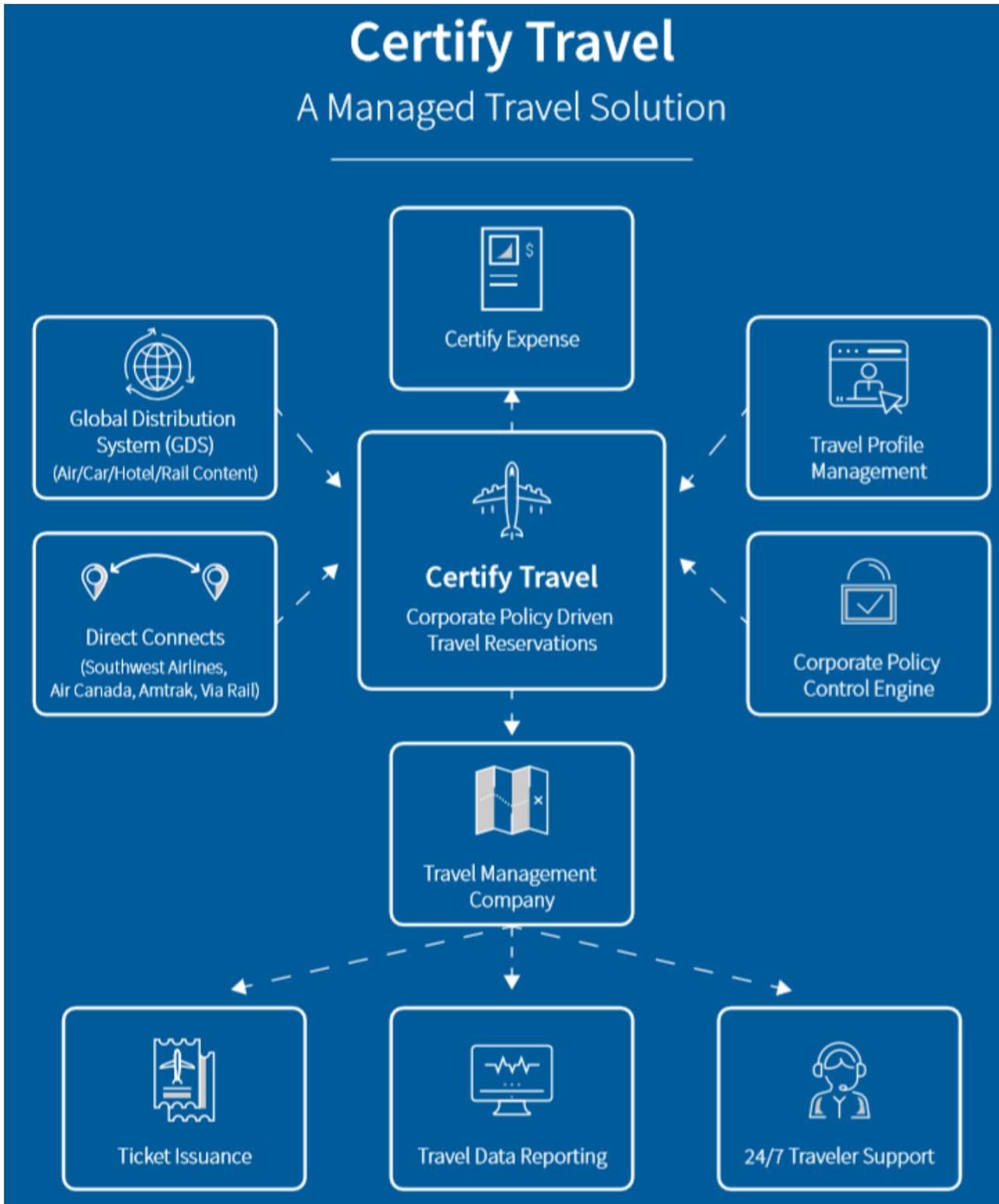
**!!NEW TRAVEL TOOL COMING!!**



**Define and communicate internal travel policies**

*!! Economy class only!! Book 14 days in advance!! Use company-preferred vendors at all times!!*

# A Managed Travel Solution



# Your Team at Certify Travel

