

BEST PRACTICE IN TRAVEL RISK MANAGEMENT 2024



KEY LEARNINGS FROM

The Future of
Travel Risk Forum

beTravelwise

SNOWBALLS

Before the forum began, the attendees were asked to write down their number one purpose for attending on a piece of paper, scrunch it into a ball and throw it to the back of the room. The following are some of those reasons that they shared.

ISO 31030 & TRM

- Understand how other companies manage TRM
 - ISO 31030
- How to manage several hundreds of people travelling at a given time
- Better understanding of how ISO 31030 can be used
 - To understand if other organisations are implementing ISO 31030
 - Application of ISO 31030 for international organisations
 - ISO 31030 and compliance
 - New ISO understanding, getting best out of assistance providers and TMCs
 - Update and Refresh 31030
 - Leading Panel

ASSISTANCE PROVIDERS

- Gather Information on assistance providers ahead of RPP
- Understand the challenges companies have with their TRM platform and assistance provider
- Travel assistance Provider Advice
- Assistance providers what is out there and am I getting the best value for money

RISK UPDATES

- Understanding Global Risk Appetite
- Global travel risk insight

PEER ADVICE

- What am I not doing, Steal an objective for next years bonus
- To leave with additional expertise to support my role and team
- TRM as a function of security
 - Learn from my peers
 - Gather thought perspectives from Travel risk owners

BEST PRACTICE & BENCHMARKING

- Best Practice for medium size entities
- Sharing ideas and benchmarking
 - Benchmark
- External Benchmarking and ideally best practice
 - Industry Standards
- Learn from peers share best practice

PEER BEST PRACTICE

- Hearing from other organisations about their biggest challenges and how these are managed
- Hear from other practitioners on latest trends in TRM
- To learn from peers in the industry
 - To understand how others execute their TRM programme

IT & INNOVATION

- AI and TRM
- Innovations in AI

Here we share the insights we gained at the Future of Travel Risk Forum last December about the new innovations and challenges facing Travel Risk Management.

The five papers cover:

- 01.** How ISO 31030 provides a strong benchmark to compare your travel security strategy against, and how to navigate difficulties from complying with the standard.
- 02.** What to look out for when going through the RFP Process, best practices when choosing an assistance provider, and ways to develop a genuine partnership with your provider.
- 03.** The new risks that have developed since COVID-19 and the extent to which travel risks have evolved, if at all.
- 04.** Technological innovations in TRM and how the role of the TRM manager will change as a result.
- 05.** How TRM can differentiate itself from other security functions within an organisation and how to ensure buy-in from the C-suite to gain funding for TRM.

The forum programme and speakers:

ISO 31030: THE MISSING LINK OR THE MILLSTONE?

Richard Merry, Author

Laetitia Piroddi, Global Security Senior Manager, PwC

Andrew Lipinski, Global Safety and Security Leader, WaterAid

David Herd, Group Security Manager, Unilever

ASSISTANCE PROVIDERS: THE GOOD, THE BAD AND THE UGLY

Justine Oliver, Woman Travel Advisor

David Jovic, Travel Security Manager, Vodafone

Steve Barry, Security and Corporate Services, Kellanova/Kellogg's

Gemma Crolla, Risk and Security Manager, DLA Piper

TRAVEL RISKS: MORE OF THE SAME OR ARE THEY EVOLVING?

Jeremy Wilkes, LGBT+ Travel Advisor

Graeham Mackenzie, HSE Group Director, Viridien

Nick Hymans, Independent Travel Risk Management Consultant, Chair GBTA EMEA Risk Committee

Nathanael Jarrett, Global Safety Advisor, Danish Refugee Council

IT & AI IN TRM: MAKING TRM EASIER OR MORE COMPLEX?

Tim Willis, VP Partnerships and Strategic Accounts, Restrata

Andrew Lowe, Security Specialist, bp

Andrew Seaward, Personnel Protective Security Risk Management and Incident Response, Deloitte

TRM AS A FUNCTION OF SECURITY

Sam Roper, Director, Enterprise Security EMEA, Netflix

Ben Mason, Global Security Manager, BBH

Ceri McQueen, Global Travel Security Lead, Dyson

Julia Pettifer, Head of Security EMEA, Blackrock

01 ISO 31030: The Missing Link or the Millstone?

What is ISO 31030? asks Richard Merry, who is chairing the first panel of the day. It is a framework for all organisations, regardless of their size, that explains how to manage travel-related risk. It elaborates on the duty of care that organisations have towards their employees and outlines best practices for travel risk management.

A Tool in Developing a Travel Security Strategy

David Herd argues that ISO 31030 is an effective tool when first developing a travel security strategy at a company. Every company should engage with the standard as you can compare your travel risk protocols against it as a benchmark. ISO 31030's effectiveness as a benchmark is demonstrated when answering surveys from insurance and travel companies before work travel; if your company follows ISO 31030, you will find that many of the questions are already covered.

There are three crucial parts to following the standard. As a company you must assess your risk, apply risk assessments and make sure you have a plan for all eventualities. You must have a risk assessment program for each country; for example, the risk rating for South Korea went to high (red) the night before a conference due to an unstable political climate. Having a risk assessment program that can change rapidly in response to world events ensures that employees are as safe as possible.

Whilst the standard suggests that you should review your travel security risk annually, David shares that they have a quarterly review to make sure that their protocols are fit for purpose. Regular checks prompt quick responses to any gaps that might occur in the system.

Having plans for every eventuality (ranging from broken legs to assessing each airline) further ensures the safety of your colleagues, and a prompt response to any potential situation that they might face.

The ISO 31030 is not just relevant to the business traveller but also to the budgeting of an organisation. The standard encourages an exploration of the boundaries of what the TRM team can cover, which has an impact on the team's allocated budget. There are cases where the definition of a travel security risk becomes vague, or where travel security risks in the standard are not relevant to an organisation, the standard can help determine these definitions.

There needs to be an active engagement with the standard, not just an acceptance of everything that the standard proposes. The organisation must also decide whether the ISO 31030 is relevant to just employees or guests as well. Being able to make this decision allows your organisation to write a framework around situations involving guests, all facilitated by the use of ISO 31030.

The creation of the standard was a collaborative process. Both David and Laetitia Piroddi were invited to a working group before ISO 31030 was officially launched, which encouraged strong engagement with the standard and ensured that their feedback was implemented before the standard was released.

How easy is it to comply with the standard?

The best way to measure compliance with the standard is through having an external audit of your TRM procedures, argues Laetitia. An external audit allows an independent organisation to provide suggestions on where you might be struggling. These travel risk auditors can provide best practice advice which will allow your organisation to not only follow ISO 31030 but also to develop a more well-rounded approach to TRM.

Laetitia stressed the challenge which came with receiving feedback from travellers, as part of the implementation process of following ISO 31030. Much of the feedback they initially received from their feedback mechanisms was about comfort (of flights or hotel rooms) or other types of issues that weren't security related.

Due to this, they restructured where their feedback mechanisms were placed, moving them to their travel booking system. Reframing the feedback questions to make them security related is also important, so you receive directly relevant feedback.



‘For organisations with less resources, ISO 31030 proves challenging’

For organisations with less resources, ISO 31030 proves challenging, argues Andrew Lipinski. The standard assumes that you have the resources to be able to conduct comprehensive monitoring, which is much more difficult for organisations with smaller TRM teams. As an NGO, he highlights that it would be very difficult to be 100% compliant with the standard.

However, Andrew agrees that when developing a travel policy from the ground up, the standard is a useful tool to build upon as a template. As a goal to build policies towards, the standard serves a great purpose when trying to rewrite travel policies.

Rewriting travel policies allows clearer communication of travel security policies to not just the security team but to leaders and travellers as well, encouraging a stronger engagement with security measures. The standard, therefore, even if granular in the way it is written, encourages clarity in the way that the TRM team can rebuild and communicate travel security measures.

ISO 31030, whilst granular and difficult for smaller organisations to achieve, provides a great framework for an organisation (small or large) to build their travel risk policies upon. It also provides an ideal standard to strive towards. Whilst some organisations may not be able to follow every section of the standard, aiming to fulfil as many sections as possible allows an organisation to have a very strong approach to TRM.

ISO 31030 is a standard developed by the International Organization for Standardization (ISO) that provides guidelines for managing travel risk within organisations. Officially titled “**ISO 31030:2021 - Travel risk management - Guidance for organizations,**” it offers a framework to help organisations identify, assess, and mitigate risks associated with business travel.

The standard is designed to protect employees, contractors, and other stakeholders who travel for work, ensuring their safety and well-being while aligning with the organisation’s duty of care obligations. It applies to all types of travel, including domestic and international trips, and covers risks such as health and safety, security, natural disasters, and geopolitical issues.

Key aspects of ISO 31030 include:

- 01. Risk Assessment:** Identifying and evaluating risks associated with travel.
- 02. Risk Mitigation:** Implementing measures to reduce or manage risks.
- 03. Communication & Training:** Ensuring clear communication with travellers before, during, and after trips, including travel risk training.
- 04. Emergency Response:** Establishing protocols for responding to travel-related incidents.
- 05. Monitoring and Review:** Continuously improving travel risk management processes.



ISO 31030 is not currently a certification standard but rather a guidance document that organisations can use to enhance their travel risk management practices. It complements other ISO standards, such as ISO 31000 (risk management principles and guidelines).



02 ASSISTANCE PROVIDERS:

THE GOOD, THE BAD AND THE UGLY!

You can have all the policies in the world but if you don't have the follow-up stage for when things go wrong, these policies do not help at all, says panel host Justine Oliver. In an emergency, the right assistance provider can make all the difference.

Tailoring your Assistance Provider to your Organisation

David Jovic states that when thinking about your assistance provider, you must ask yourself whether you have the right supplier for yourself or the right supplier for the company.

There are pitfalls in focusing too much on what might be good for the travel security manager over what might be good for other parts of the company. He gave the example of travel tracking; whilst regular business travellers may not want to be tracked, for the travel security manager travel tracking can help pre-emptively prevent many of the security risks that the business traveller may encounter.

The assistance provider must tailor their product to the service line of your organisation. A more technological organisation, such as Vodafone, requires a technologically sleek product, whilst another organisation might prioritise the different types of assistance that the supplier would be able to supply or the aesthetic branding of the product.

'There is a difference between the desired provider for the TRM teams and the desired provider for the business traveller'

There is a difference between the desired provider for the TRM teams and the desired provider for the business traveller, agrees Steve Barry. There is a generational difference in approaches to travelling which needs to be factored into choosing the right assistance provider.

Younger travellers (who are increasingly becoming a large proportion of the business travel population) consume content differently to older travellers; an assistance provider being able to tailor content to this younger generation means that the information will be communicated more effectively.

Genuine Partnerships with Assistance Providers

It is important when selecting an assistance provider to feel like it is a genuine partnership, argues Steve. The ideal assistance provider would make the relationship feel collaborative and not merely financial, as well as being responsive to any changes that you suggest.

Steve suggested the metaphor of looking at an “à la carte” menu versus looking at an all-you-can-eat buffet when searching for new assistance providers. An “à la carte” menu provider would be one that allows to cherry pick specific services, with no peripherals, whilst an all-you-can-eat buffet provider gives you many different options (all included) that you can select from but not necessarily tailored to your needs. “À la carte” menu providers are usually far more responsive and often will adapt to your needs.

The adaptability of a provider is what makes them stand out. Gemma Crolla identified three key desired attributes for a provider: their adaptability to your needs, their ethos on continuous improvement and their behaviour when receiving feedback from you as a client. All assistance providers, whilst providing similar services and products, are certainly not the same; their approach to delivering their services is what stands them apart.

‘For me the potential to build a relationship is the most important part in the decision process for selecting an assistance provider’

Steve and Gemma agree that the potential to build a relationship is the most important part in the decision making process for selecting an assistance provider after the RFP process. Gemma says that getting to know a provider’s approach and ethos is crucial to her firm; speaking to the leaders of an assistance provider, one hopes that the ethos of a company influences everything that they do and is instilled in the wider teams, not just in the leadership.

Steve argues that the provider becomes more open to change and adaptability if you build a relationship in these initial stages. The simple ability to pick up the phone and reach out to a provider is extremely important to Steve, and having this relationship develops a collaborative approach to travel security which will benefit your team in the long run.

The RFP Process

The RFP process takes a lot longer than you might think, Gemma says; unexpected and unanticipated things always come from the process, whether internally or externally. You have to make sure that everyone is thoroughly engaged internally before you put your requirements out, so that there is an internal ambition before you go through the process. Internal stakeholders can act as champions for you when it comes time to embed the new services and new provider, so making sure that they are on your side is important during the RFP process.

Developing clear criteria and understanding how you grade each individual question is extremely important, argues David. You must grade each requirement with a scientific approach, particularly if you have a long list of requirements. Using this approach, the quality and the speed of the RFP process will be much higher and faster.

The actual change process can be difficult. You must update all your employees' awareness of the new travel security protocols, as well as develop a clear strategy into how the assistance provider will be embedded into the organisation's protocols. Steve highlights the importance of having a mid-long term plan for what to do after signing the contract with a new provider; thinking how it will affect your employees in six to twelve months time to ensure that your implementation strategy is strong.

During the conversation, one of the panellists gives an example of a service provider bidding for a contract by describing an extreme incident in a country where their organisation did not operate. This example highlights the importance of research for the assistance providers; the assistance provider in this case did not tailor

their pitch to the specific organisation, which meant they seemed unprepared coming into the RFP. Not being swayed by extravagant stories during the RFP process is important, as the day-to-day incidents that an organisation's traveller is likely to face is often far more important than dealing with the more exotic, rarer ones.

Reference checking is also extremely important. References helped each panellist support their original decision during the RFP process. They highlight not to make the mistake of asking the suppliers for references, as they would simply provide the best possible references. Instead ask to contact clients in similar businesses to yourself with similar traveller profiles.

If you do not ask the right questions when getting a reference, you may run into trouble; good assistance providers tailor their approach to each business and so some references may not reflect the true experience that you may have as an organisation. Each organisation wants different things out of their assistance providers, and so when seeking references, you have to keep this in mind.

There are three key areas which the panellists believe are important in the process of securing an assistance provider: insisting on a trial period, making sure that the technology is functional and developing a comprehensive comms plan with the new roll out. A trial period allows you to determine whether the service provider is the right fit for the company, and in this period, you can test to see whether the technological capability is there. Without a comms plan, changing provider creates lots of inefficiencies. Developing a comprehensive comms plan is important so that your colleagues will easily be able to adapt to the change.

03 TRAVEL RISKS: MORE OF THE SAME OR ARE THEY EVOLVING?

“Are travel risks the same or are there new challenges in the world of business travel?”, asks Jeremy Wilkes to kick off the panel. The discussion focuses on a range of topics: how to adjust to different age groups’ approach to travel, navigating bleisure, and how TRM managers can be prepared to react to any challenges that might arise.

New challenges from different age demographics

Since the pandemic, new workers have not been exposed to the same risks, as they have mainly worked from home, argues Graeham Mackenzie. When they first engage in business travel, therefore, they are less risk aware than new travellers were before the pandemic.

Accompanied by this change from the pandemic, the focus of his organisation has changed as well; shifting from a high-risk environment to one that is primarily office-based. With less exposure to high-risks, and fewer in-office interactions, the new joiners to the workplace face many new challenges that colleagues had not faced previously.

Graeham suggests that training must evolve to reflect this. With different attention spans and different exposure to risks, new approaches to



training younger colleagues are necessary to ensure the best possible outcomes.

‘Approaching TRM with a diverse team is a great way to combat differences between age demographics’

Approaching TRM with a diverse team is another great way to combat differences between age demographics; having younger members of the team enables stronger communication from the team across all age groups. Using apps, screensavers and elearning enables travel risk training to be entertaining and not too boring, encouraging engagement from all parts of an organisation.

Creating new, engaging ways to respond to travel risks encourages buy-in from the management of organisations as well. Showing the ways in which your travel risk management programme is technologically focused is a great way to demonstrate its effectiveness. Graeham always uses a three click rule when working with suppliers: if you can’t get through the app to what you need within three clicks, then he does not use the app. User-friendliness is very important; over-complicated technology for your colleagues is ineffective in the travel risk management space.

Have the travel risks really changed that much?

On the other hand, Nick Hymans argues that the risks have not changed significantly. Drawing from his experience at large financial organisations, in the finance industry he believes that the generational gap does not cause such a difference in resilience and risk awareness.

He argues that standards such as ISO31000 and ISO31030 pose challenges to the travel risk management team. Attempts to standardise approaches within a large organisation are difficult; employees have lots of different ways of accessing and understanding knowledge, and you must be aware of these differences.

If you are an organisation which has different teams who focus on different sectors, you need to adjust your communication style accordingly. Some travellers, for example, may not want to be tracked when engaging in business travel if they are building new relationships with clients. Tracking their business trips would allow the person with access to that information to be aware of the next strategies of the company.

It is the responsibility of the TRM team to communicate to these travellers that there is not only a duty of care for the organisation to the travellers but also a duty of loyalty from the individual travellers to the organisation. If one of these employees weren't tracked and they were lost in a high-risk area, this would be an extremely distressing situation both for the organisation and the employee.

To succeed in your role, you need to make sure you use your suppliers and the internal resources of your company. You pay the suppliers to ensure that they deliver the best possible product, so giving them lots of feedback on their products or services means that you are getting the best value out of this money. In the financial services industry, and across many other industries, front offices have huge resources, so trying to tap into some of these resources by outlining to the staff travelling abroad the importance of travel safety can be a good way to navigate challenging budgets.

Cultural changes in the office

Nathanael Jarrett argues that cultural changes in the office may change approaches to travel risk management. In an organisation, there needs to be the right balance between staff resilience, good travel, and developing a relationship with incident management.

'Through internal training your organisation can develop resilience before situations occur'

It is crucial to conduct resilience training. Through internal training (HEAT*, crisis management and incident management training), your organisation can develop this resilience before situations occur. Finding the time to conduct this training is difficult but crucial.

Nathanael also highlights the problem of the responsibility of the TRM team; where do you draw the line in terms of who you look after? In an organisation which has a heavily decentralised, regionalised operation, it's very difficult to map and centrally control travel and organise responsibility if an incident occurs. As organisations become less centralised due to advancements in technology, it is crucial to establish clear boundaries in terms of the TRM team's duty of care to maximise the value that they can add.

Jeremy agrees that culturally many organisations have faced new changes. Organisations must be aware that these changes do not always impact just the younger members but the older members as well. Older employees may be less likely to read the briefing documents before going on business travel and so could be less aware of the societal or cultural values of the country they are visiting. Making sure to target all age groups in communications is important, and not just the younger generation.

‘Bleisure’

The topic of bleisure (business + leisure) comes up on the panel, and each panellist gives their own view on TRM responsibilities with bleisure. Nathanael identifies the challenge of when R&R is mixed with personal leave: how do you ensure that the traveller is as safe as possible when engaging with this mix? In practice, he thinks it's very difficult, you must accept the shades of grey and try and manage what you can.

Nathanael also discusses social media use on work travel, in particular cases where a traveller is travelling to a country where certain views or beliefs are illegal, yet they have old postings aligning with these beliefs on their social media. How do you make sure that they can be safe whilst also recognising their right to free speech? Taking a clean laptop or deconflicting some of your information is a strong approach to navigating travel to these places; as is questioning the need for travel there. Only by having challenging conversations can TRM teams work out how they would navigate these situations.

Graham responds that you must put policies in place before bleisure occurs so that if any incidents happen, the traveller will know what will be covered by the organisation and what will not be covered. You need to formalise the difference between work time and time off work; the handover of responsibility where at the weekend the traveller must take responsibility for themselves.

Ultimately, it comes down to the decision of the business, Nick concludes; some companies he has worked for have supported their employees during leisure travel and some have not. It is up to the business to draw the line in terms of what is covered by the TRM team; by clearly drawing this line, responsibility over issues will be clear not just to the employee but the wider TRM team as well.

04 IT AND AI IN TRM: MAKING TRM EASIER OR MORE COMPLEX?

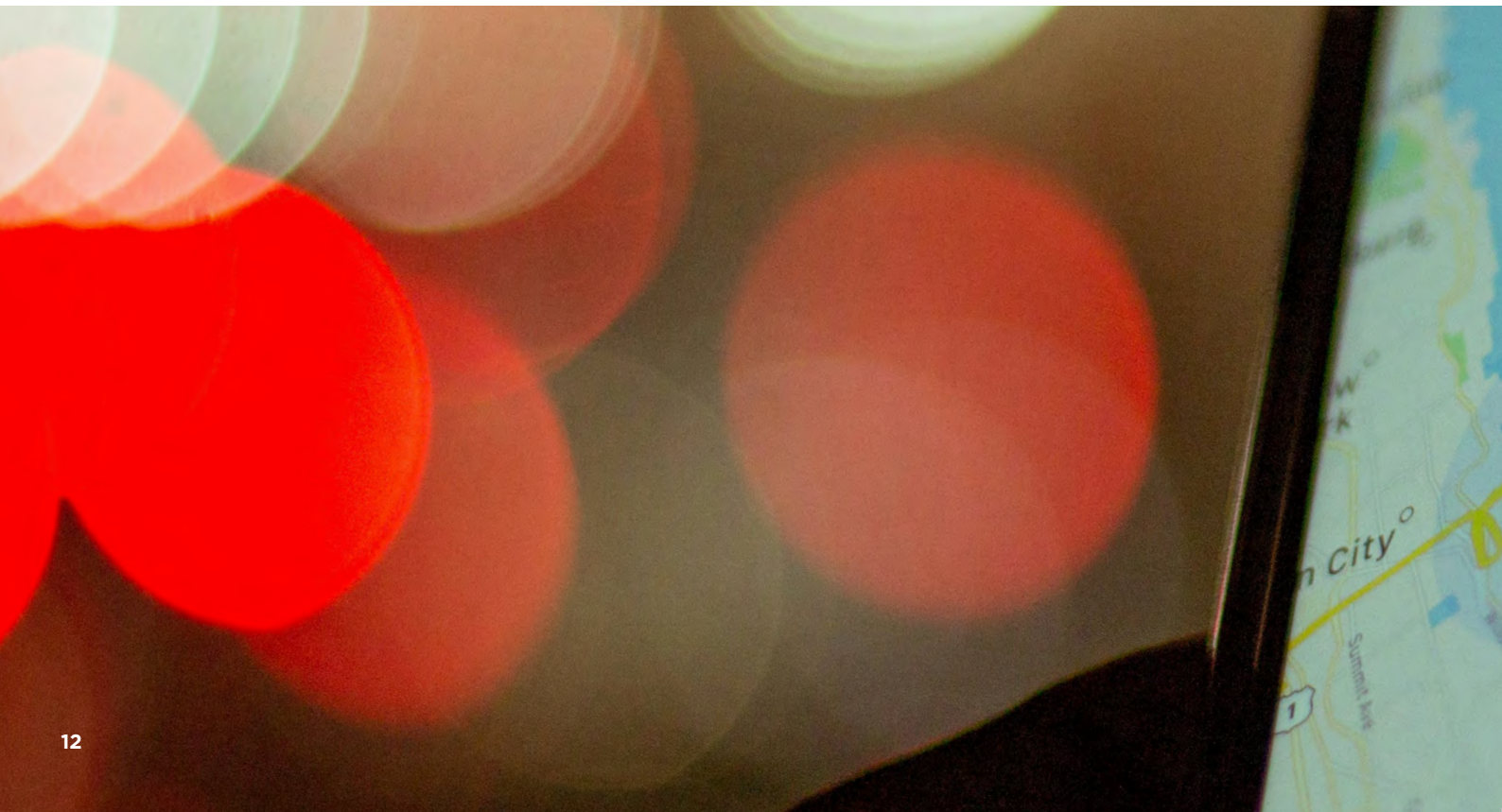
How tech-led has the role of travel risk manager become? This is the question that kicks off the panel led by Tim Willis.

Travel Risk Portals and Compliance

Andy Lowe says that he uses technology regularly in his role, primarily to help with compliance. Technology makes information much more accessible, both in terms of availability and readability.

With travel risk management platforms, TRM teams can both check data and submit approvals. Technology makes all the information auditable and centralised, making it easily accessible for the TRM team.

Andrew Seaward similarly uses a travel risk approval and consultation portal. He outlines that there are two approaches to using the portal. There is first a pre-trip meeting with a member of the security team who then updates the portal. Then while travelling, the TRM team can communicate with the employees through the portal to fully prepare them for their travel. This communication process is not fully automated, with some of the messaging still coming from the security team itself.



There are other technologies, Andrew says, that a TRM team can use, such as content created by elearning providers and your assistance provider's app. Elearning providers help put tech-reliant training and learning in front of people to prepare them before they travel, and your assistance provider's app can be used in case of any emergency communications. Being open to all of these forms of technological assistance helps the TRM team better protect their colleagues.

Combatting app fatigue in travel risk management

App fatigue is definitely a real issue, Andy says. As a TRM manager, you are security oriented, while most travellers do not have the same approach to security. Therefore, when organising the travel process, you must approach it from the point of view of somebody who is less security-conscious, so that your communication strategy is stronger.

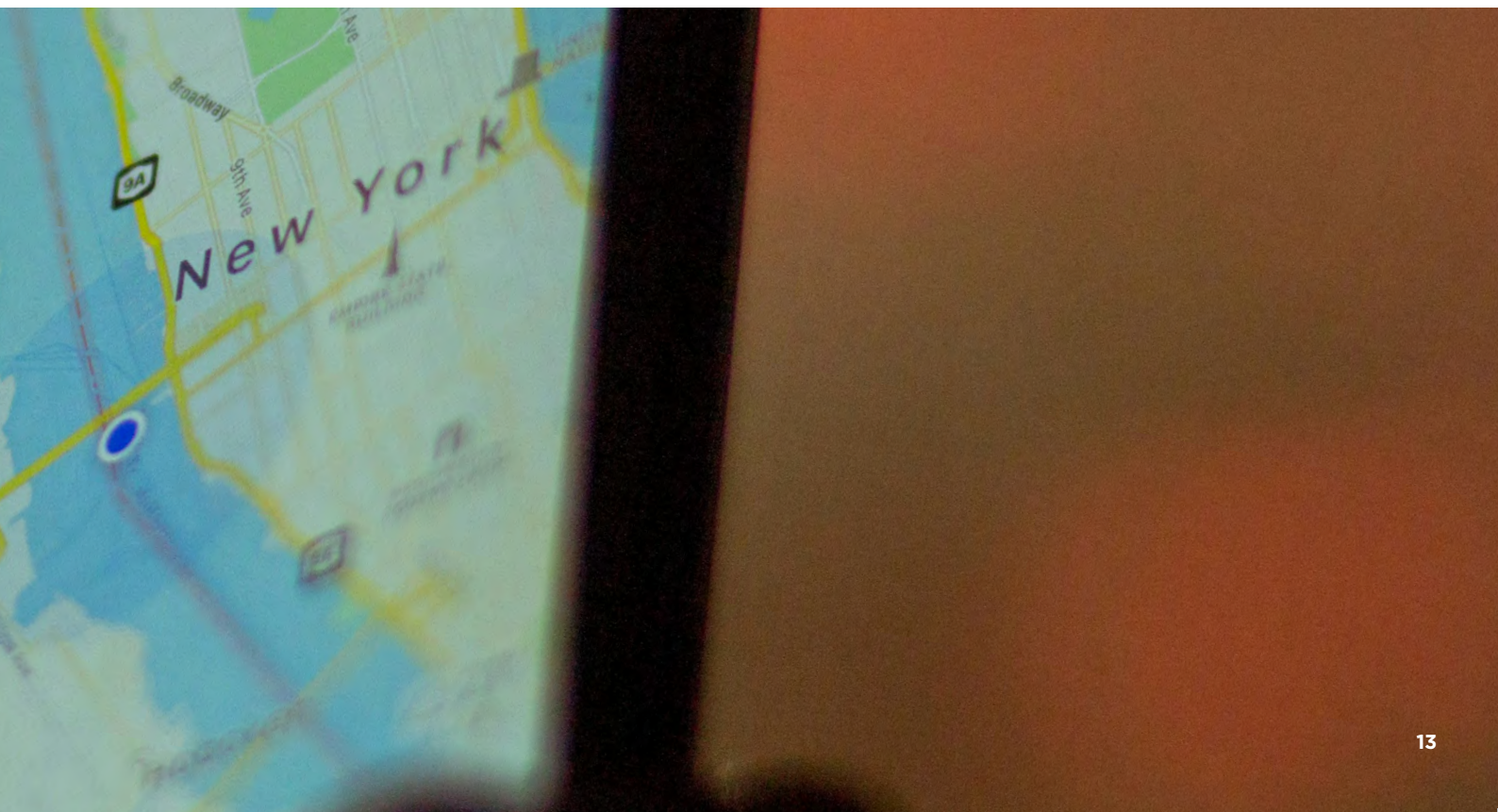
Over-customisation is the "kiss of death" for apps, Andy states. New technology makes it easier to initially create apps, leaving more time for customisation. While customisation has its benefits, excessive customisation prolongs projects greatly, and if an app is designed for

everyone, its suitability often ends up being suitable for no one.

Keeping travel technology in apps simple and easy to use is extremely important. Data privacy issues can arise from excessive customisation options. While having information about people's whereabouts or addresses of residence might create more stylish features, you must be very aware of who has access to this data. When engaging with suppliers, you need to make sure that their product suits your company and avoid being overpersuaded by some customisable features that are not relevant.

'Whilst technology can pose risks, you have to embrace it and utilise it to fully exploit it'

Andrew agrees that fatigue is indeed a problem, but whilst technology can pose risks, you have to embrace it and utilise it to fully exploit it. Technological change is not a new challenge, but one that will always occur within a large organisation with lots of different functions. As a team you can create a culture where you are open to change, which will put you on the front foot when adopting the next inevitable change in technology.





Artificial intelligence and travel risk management

AI is the big trend on the horizon in TRM, Andrew argues. AI can certainly be used in the future to improve TRM systems. Data from the travel risk approval and consultation portal will be used by AI to increase effectiveness. This system led by AI will either be developed by a supplier or internally within the travel risk team; it will be interesting to see from a data privacy perspective whether it will be an external or internally led transformation.

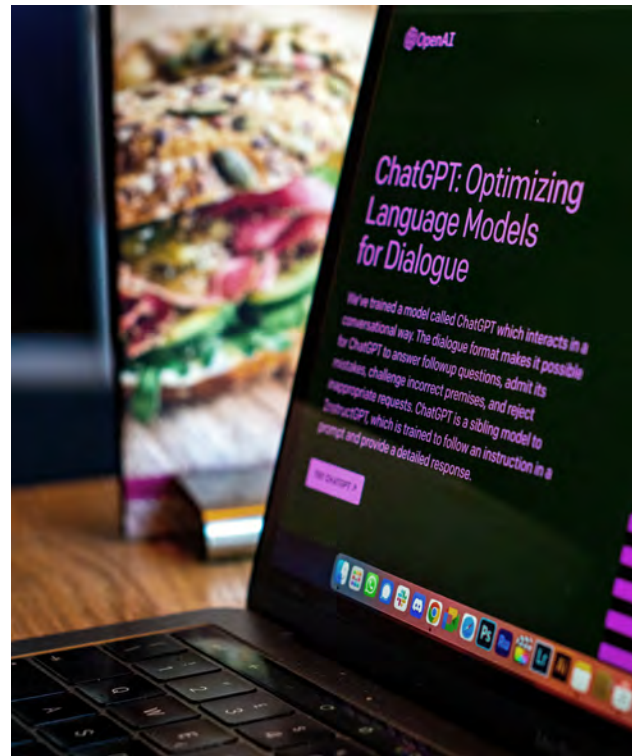
Andrew sees AI being used around the office on a day-to-day basis already and identifies its tactical applications; it is not a near future tool but a contemporary one.

‘AI is not a near future tool but a contemporary one’

In terms of day-to-day tangible benefits of AI, currently Copilot and content creation are the two main benefits that the panel recognise. The ease with which Copilot takes meeting notes and the ability of ChatGPT to compose emails allows the workflow of the day to be faster by taking away laborious tasks.

AI is going to be great in terms of data usage, Andy states. Being able to analyse information that you would not normally have the time to analyse (for example the minutiae of flight times) will be extremely productive for the organisation; taking all the tasks that are really laborious and making them simpler.

However, using AI to track data about your employees should be approached with a degree of caution. Gathering too much sensitive information may raise an issue of trust for the employee concerned. Andrew argued that if you do not treat people like adults, they will not behave like adults when abroad.



Andy adds to this that there may be legal challenges you face if you try to create more security systems led by data tracking; whilst it would be great in terms of security to know the location of people, in order to maintain resilience, you should maintain simplicity.

You also have to be wary of suppliers using ‘AI’ as a buzzword and unproductively. They use it in pitches to describe their plans but do not fully explain their capabilities now. A supplier who is self-aware of their technological capability is more attractive than one who does not describe how their technology works currently.

AI is having tangible benefits right now in the travel risk world. Learning to build “prompts” is becoming an important skill for the travel risk manager. AI does not only help create content but also can be an invaluable tool in analysing data, so has indeed had an important change in the TRM space.

05 TRM AS A FUNCTION OF SECURITY

How can you highlight the importance of TRM programs so that they stand out amongst the wider capabilities of an organisation's security function? Sam Roper asks this question to begin the final panel of the day.

The Importance of Communication

You must communicate effectively, says Julia Pettifer. You must identify who the key stakeholders are who might be champions down the line for your budget and make sure they understand what you're doing (whilst maintaining the privacy of those involved). Collaborating with legal and health and safety can work in your favour as well; to demonstrate you are showing value, you must show it is a legal requirement to have the different forms of travel security in place.

Speaking in the language of the C Suite and talking about the things that they're worried about is very important when turning their attention to TRM, Julia says. Currently, there is massive unpredictability in both the markets and in geopolitics, which means that it is less predictable how to respond to situations, which increases risk. Talking in terms of increased risk, TRM is crucially important as its function allows the firm to get things done.

'Highlighting TRM's importance is all about storytelling'

It is all about storytelling, points out Ben Mason. When a traveller can meet a high net worth individual abroad and close a deal, you can explain how they accomplished this through your TRM programme to senior stakeholders. Demonstrating that you have not just a legal but also a moral obligation to your travellers gives more value to your TRM's global function.

Ceri McQueen agrees with Ben about the importance of storytelling. You do not want to be the security team that just says "no" to everything. Being able to give examples to senior stakeholders of where the TRM programme has been a success really benefits your case. By going above and beyond what some companies do in terms of supporting employees, you can develop employee loyalty, which will be beneficial to the organisation in the long term.

TRM's Place in the Wider Organisation

Different organisations across the panel had different approaches to how responsibilities over risk are divided up internally. Sam and Julia agreed that travel risk needs to be owned by the travel team, the security manager has to coordinate across lots of different internal stakeholders and having clear boundaries of responsibility ensures that you can maximise your effectiveness. Ceri, on the other hand, has a travel security working group; she works closely with the travel and expense team to collaborate on any potential business travel.

One of the main questions that Ben asks is how can you build TRM into your overall strategy across the firm? Having a three-year strategy about the value of TRM makes your advocacy for TRM resonate more strongly within the firm. If there is a firm-wide strategy, adapting your TRM strategy to reflect this can also benefit your team.

Sam asked Ceri about her role's creation, to which Ceri replied that Dyson saw a gap in the security strategy in their coverage of TRM and created her role. Having worked with the security team for a number of years, she found that ISO 31030 benefitted her enormously in understanding the full scope of the function.

'In American companies, ISO 31030 does not have the same importance it seems to have with other organisations'

Being able to apply one hundred percent focus on TRM, Ceri is able to first get policies approved and then focus on other parts of TRM that usually she would never be able to do, such as training with her neurodiverse and LGBTQ+ networks. Being in a dedicated role means that they have a very collaborative physical security function within her organisation, and the regional security managers are happy that some

of the risk responsibilities of their roles are now being covered by an overall travel security lead.

As an American company, Julia argues, ISO 31030, and external values as a whole, are not valued to the same extent as they are at other organisations. In financial services, there is such a compliance driven culture and they are audited to such an extent that they do not feel the need for external standards. As a British manager in charge of travel security, you must be aware of cultural differences in terms of standards with your American colleagues.



The panel discusses how they started in TRM and security more widely. Working as an assistance provider before working in internal security has benefitted my role, Ben says. Having a base knowledge and understanding of what it is like from the other side from a risk perspective has its benefits, giving you practical experience of dealing with varied situations for a host of clients that prepares you and gives you confidence when dealing with situations in-house.

Ceri had a non-typical pathway into the industry, not coming from an assistance provider previously. She trained and received the security management certificate and then decided to specialise in travel security. She says that starting with TRM is a great stepping stone and you do not need to come from an assistance provider background. It's important to have a diverse team when approaching TRM so that as a team you can lean on each other's different experiences.

SUMMARY

Looking back over the day, we're pleased to see that many of the snowballs that our attendees wrote at the start of the day were covered by the panellists. Here are some of the key points summarised below:

- ISO 31030 provides a valuable tool to be able to identify internal weaknesses.
- ISO 31030 is particularly suitable for large corporates and charities as a benchmark to build your travel security strategies upon.
- You need to consider how you internally communicate changes in assistance providers.
- The timeline of changing assistance providers tends to be longer than you think.
- Attention spans are changing, and you need to make sure that the content you create for your travellers reflects this.
- COVID-19 and working from home policies have affected work travellers' risk awareness, so make sure you are open to different strategies to communicate to these travellers.
- A strategy needs to be created to how you justify the cost of the work you do - when you are doing a good job, nothing happens, so you need to make sure that the organisation knows the work you are doing.
- Bleisure can cause problems for your organisation, working out the line between business and leisure can help create your travellers understand their responsibility towards the organisation.
- Software makes managing lots of travellers easier, but you must make sure it is simple and easy to use.
- App fatigue is becoming a bigger and bigger problem, work out ways you can capture users' attention.
- Establish a policy that determines whether prioritising the safety of your travellers through data utilisation outweighs the importance of maintaining their data privacy.
- Storytelling is important when justifying TRM's value within an organisation.
- TRM helps the organisation secure big deals through ensuring that their high-profile travellers can reach places safely and securely and allows the organisation to avoid legal claims and health and safety prosecutions.
- Geopolitical tensions and the shifting of GDP to the Global East and South means that TRM is as important as ever.
- Great TRM teams try not to always say no to their travellers but try everything they possibly can to ensure that travellers can achieve their aims safely.

One of the key takeaways from the forum was that the best way that travel risk management teams can prepare themselves for future opportunities and challenges is to engage with colleagues about their different experiences. Through these conversations, you may uncover areas your organisation has overlooked or discover new approaches to navigating emerging industry standards, helping your team achieve the best possible outcomes for your organisation.

**THE BEST WAY
THAT TRAVEL RISK
MANAGEMENT
TEAMS CAN PREPARE
THEMSELVES
FOR FUTURE
OPPORTUNITIES
AND CHALLENGES
IS TO ENGAGE WITH
COLLEAGUES ABOUT
THEIR DIFFERENT
EXPERIENCES.**

beTravelwise

Leaders in Custom Travel Safety & Workplace Security Training

WHY DO OUR CLIENTS CHOOSE US?

