**Travel Itinerary Template**

Effectively organizing all the details of an executive’s travel plans requires a travel itinerary template that you use consistently. Don’t ask your travelers if they want one – just do it! They’ll thank you for it later. And in the meantime, you’ll have saved them a lot of time and hassle in sorting through multiple documents or scrolling through various emails to find the information they need while traveling. The following are additional tips to make the most of this template:

**Think Chronologically**

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

**How to Use This Travel Itinerary Template**

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

Here are some tips to get you started:

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

**EACH TIME YOU NEED TO CREATE AN ITINERARY, FOLLOW THESE STEPS TO UPDATE THE TEMPLATE WITH YOUR EXECUTIVE’S TRAVEL INFORMATION:**

1. Personalize the **HEADER** information on the template
   1. Include your executive’s name and your company name.
   2. Insert your company’s name/logo.
   3. Update the travel dates.
2. Update/add all **AIRLINE** information:
   1. Delete all previous times on the itinerary template.
   2. Update all airline information requested on the template: dates, times, flight numbers, airline 800 numbers, travel agency numbers, or any other information that might be needed while traveling.
3. Update the **GROUND TRANSPORTATION** information:
   1. Be sure to include car service info or shuttle/taxi contact numbers.
   2. List on the itinerary where the car service or shuttle will pick the passenger up.
   3. Include the confirmation number.
4. Update the **HOTEL** information:
   1. Be sure there is a hotel contact number to reach the hotel.
   2. Include street address and any applicable driving directions necessary.
   3. Include the confirmation number and room rate.
5. Insert all pertinent **MEETING INFORMATION** in order of dates/times.
   1. Make sure to reference which time zone the time is listed in.   
      [Go to [**http://www.timeanddate.com/time/**](http://www.timeanddate.com/time/)to find out which time zone abbreviations apply at various times of the year.]
   2. Include conference number dial in and passcode information in case their flights are delayed and they need to join the meeting from their cell phone until they arrive at the meeting location. (It happens!)
6. Check each section of the itinerary for information that needs to be updated.
7. Treat the compilation of the itinerary as though you were the traveler. What additional information would you want to know?
   1. Driving directions
   2. Restaurant options and/or locations
   3. Entertainment venues
   4. How to dial in to get voice messages
   5. How to access email (or webmail) remotely
8. PROOFREAD, PROOFREAD, PROOFREAD the completed itinerary. There are a lot of details here, so make sure you proof it well.

**HOW TO NAME YOUR ITINERARY FILES**

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

XXXXXX – Location – Name or Initials of Traveler (i.e. 073024 – Tampa FL – JLP)

XXXXXX – Location Event Name of Traveler (i.e. 073024 – Tampa FL APC Conf JLP)

In these examples, the beginning date of the trip was July 30, 2024. The destination was Tampa, Florida for ASAP’s APC Conference. The traveler’s initials were JLP.

When using dates in your file names, consider using full six-digit dates so they always align in order by date. You may also consider starting with a 2-digit or 4-digit year, so you can find things by the year, then the month and day. Using the same sample data from above, that would look like this: 2024 0730 Tampa FL JLP

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

**For other tips and strategies to make your administrative life easier,**

**visit our website at www.asaporg.com**

Executive Name

Insert company logo here (optional)

Company Name Board Meeting

City, State

Travel Itinerary

Month X, 2024 – Month X, 2024

| **Time:** | **Event:** | **Details:** |
| --- | --- | --- |
| **Monday, Month X, 2024** | | |
| 5:45 AM CST | **Car Service Name** will pick you up at \_\_\_\_\_\_\_\_\_\_ and transport you to the \_\_\_\_\_\_\_\_\_\_\_ Airport (XXX – 3 letter airport code here). | Phone: (XXX) XXX-XXXX  Confirmation #: XXXXXXXX  Paid for with \_\_\_\_\_\_\_ - $XX |
| 7:05 AM CST | **Depart City** – Airline Name Flight # XXXX  To Chicago, O’Hare Airport (ORD)  Flight time: 1 hour | Airlines Phone: (XXX) XXX-XXXX  Confirmation Number: XXXXXXXXX  E-Ticket #: XXXXXX  Freq. Flier #: XXXXXXXX  Food will NOT be available during flight. |
| 8:05 AM CST | Arrive Chicago O’Hare |  |
| 9:00 AM CST | **Depart Chicago O’Hare –** Airline Name Flight #XX to  City, State  Flight Time: 9 hours 25 minutes | First Class Seat  Food will be served during flight. |
| 2:25 PM HST | **Arrive City, State** | TIME CHANGE IS X HOURS DIFFERENT FROM CENTRAL TIME. |
|  | **Ground Transportation: Car Service Name** will provide transportation from the Airport to the \_\_\_\_\_\_\_\_\_\_\_\_. The driver will meet you at the gate with a sign with your name. | Telephone: (XXX) XXX-XXXX  Cost will be charged directly to \_\_\_\_\_\_\_\_ account. |
|  | **Accommodations:**  Hotel Name  Hotel Address  Hotel Address | Resort Telephone: (XXX) XXX-XXXX  Confirmation No: XXXXXX  $ XXX.00 USD plus 11.4166% Tax  Check In Time:  Check Out Time: |
| **Tuesday, Month X, 2024** | | |
|  | **Ground Transportation:** Taxi service is available via the valet from the Hotel to the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ offices. |  |
|  | Meeting Location:  **Company Name**  Street Address  City, State Zip | Corporate Receptionist: (XXX) XXX-XXXX  Contact Person’s cell: (XXX) XXX-XXXX   * Please check-in with Security on the ground floor with a picture ID to obtain a badge. |
| 7:30 AM HST | **Continental Breakfast** |  |
| 8:00 AM – 9:30 AM HST | **Audit Committee Meeting** | Attire: Business Casual (no tie or jacket) |
| 10:00 AM – 1:30 PM HST | **Board of Directors Meeting** |  |
| NOON HST | **Lunch** |  |
| 3:00 PM HST | **Ground Transportation:** Car service by \_\_\_\_\_\_\_\_\_\_\_ from \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_to the airport. | Cost will be charged directly to \_\_\_\_\_\_\_\_\_\_ account. |
| 5:50 PM HST | Depart City, State – Airline Name Flight # XXTo City State (3 digit airport code) Flight time: 8 hours 5 min. | Airlines Phone: 800-433-7300  Confirmation Number: XXXXXXXXX  E-Ticket #: XXXXXX  Freq. Flier #: AA XXXXXXXX  First Class Seat  Food will be served during flight. |
| 5:55 AM CST | **Arrive City, State** |  |
| 7:00 AM CST | **Depart City, State on Airline Name Flight # XXXX**  To City State (3 digit airport code) | Food will NOT be served during flight. |
| 7:55 AM CST | **Arrive City State** – Airport Name |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Office Phone** | **Cell Phone** | **Home Phone** |
| Other VPs |  |  |  |
| Company Execs |  |  |  |
| Admin Assistant’s Info |  |  |  |
| Key Dept Heads |  |  |  |
| ETC |  |  |  |
|  |  |  |  |
|  |  |  |  |