



THE ADMIN

— COMMUNITY —

TRAVEL CHECKLIST

Are you ready to become an expert in executive travel planning? Uncover the 10 crucial steps for booking and managing executive travel with our in-depth checklist! With The Admin Community, you'll gain access to invaluable resources like this one, engage in exclusive courses, and connect with a network of like-minded administrative professionals committed to learning and growth.

Confirm the executive's travel dates and itinerary:

Consult with the executive to establish the location, dates, and preferred travel times, or connect directly with the event organizer to determine the necessary arrival and departure times.

Determine the travel budget:

Collaborate with the executive or team members to establish budgetary guidelines for travel. Adhere to your organization's travel policies and keep a copy handy for reference. ([Join and visit the learning resources section in our admin community for budget guides.](#))

Research and book flights:

Find and book flights that accommodate the executive's schedule, budget, and any preferred airlines or loyalty programs.

Reserve accommodations:

Secure hotel reservations that align with the executive's preferences and travel budget.

Organize transportation:

Coordinate airport transfers and any additional transportation needed during the trip.

Plan meal reservations:

Review the event itinerary to identify provided meals, and consult with the executive to determine additional dining reservations needed. Pro tip: For conferences, book 2-3 flexible reservations with varying times and attendee quantities, and cancel as needed.

Prepare travel documents

Compile essential documents such as flight itineraries, hotel confirmations, and rental car information, and provide them to the executive.

Confirm reservations in advance:

Ideally, a week before departure, verify all reservations—including flights, accommodations, and transportation—to ensure everything is in order.

Create a detailed itinerary:

Develop a comprehensive itinerary that includes all travel arrangements, meetings, and important events. Tailor the format to the executive's preference (e.g., PDF or calendar). Pro tip: Include all relevant details, such as confirmation emails, contact information, and addresses, in the appropriate timezone. ([Explore our calendar management course in the community for best practices.](#))

Manage expenses and submit expense reports:

Keep track of all trip-related expenses, including receipts and invoices. Create accurate, detailed expense reports promptly after the trip, and submit the completed expense report.