

# Standard Operating Procedure (SOP): Travel Itinerary Preparation and Documentation

This SOP details the process for **travel itinerary preparation and documentation**, covering the creation of detailed travel plans, scheduling transportation and accommodations, organizing activities and meetings, ensuring timely dissemination of the itinerary to all travelers, and maintaining accurate records for reference and compliance purposes. The aim is to facilitate smooth travel experiences by providing clear, comprehensive, and well-documented travel arrangements.

## 1. Purpose

To ensure organized, efficient, and compliant travel by preparing, documenting, and distributing comprehensive travel itineraries for all travelers.

## 2. Scope

This SOP applies to all personnel responsible for organizing company-related or official travel, including administrative assistants, travel coordinators, and management.

## 3. Responsibilities

- **Travel Coordinator:** Prepare itineraries, secure bookings, distribute documentation, and maintain records.
- **Travelers:** Provide required personal and travel details; review the itinerary for accuracy and notify of discrepancies.
- **Approving Manager/Supervisor:** Review and approve travel plans prior to booking.

## 4. Procedure

1. **Collect Travel Requirements:**
  - Obtain traveler details (names, passport/ID, preferences, etc.).
  - Define purpose, destination, dates, budget, and special requirements for the trip.
2. **Research and Schedule Transportation:**
  - Identify suitable transport options (flights, trains, cars, etc.).
  - Check schedules, fares, connections, and booking policies.
  - Make provisional reservations as required.
3. **Arrange Accommodation:**
  - Shortlist lodging options based on proximity, amenities, and budget.
  - Confirm availability and book accommodations.
4. **Organize Activities and Meetings:**
  - Schedule official meetings, site visits, and leisure activities as needed.
  - Coordinate with hosts or local contacts.
5. **Create Detailed Itinerary:**
  - Compile all bookings, confirmation numbers, contact details, maps, and instructions into an itinerary document.
  - Include emergency contact information, company travel policy references, and notes.
6. **Approval Process:**
  - Submit the itinerary for review and approval by the designated manager/supervisor.
7. **Dissemination of Itinerary:**
  - Share the final, approved itinerary with the traveler(s) and relevant stakeholders (HR, finance, etc.).
  - Provide electronic and/or hard copies as appropriate.
8. **Documentation and Record Keeping:**
  - Maintain digital and/or physical records of all travel documents and itineraries for future reference and compliance audits.

## 5. Documentation Template

Section	Details
Traveler Name(s)	[Enter Full Name(s)]

Travel Dates	[Enter Start and End Dates]
Destination(s)	[Enter Cities/Countries]
Transportation	- Mode: [Flight/Train/Car] - Carrier & Flight/Train Number: [Details] - Departure: [Date, Time, Location] - Arrival: [Date, Time, Location] - Confirmation Number: [Entry]
Accommodation	- Hotel Name: [Entry] - Address: [Entry] - Check-in/Out: [Entry] - Confirmation Number: [Entry]
Meetings/Activities	- Date & Time: [Entry] - Venue: [Entry] - Host/Contact: [Entry] - Purpose: [Entry]
Emergency Contacts	[Entry]
Notes & Special Instructions	[Entry]

## 6. Compliance & Record Retention

- All travel documentation must comply with company policy and relevant travel regulations.
- Records should be retained in accordance with the organization's document retention schedule (minimum period as defined by policy).

## 7. Review & Revision

This SOP should be reviewed annually or when significant changes in travel policy or procedure occur. Updates must be documented in the SOP revision history.