

The essential checklist to successfully implement your **Corporate Card** program.





Setting up your Corporate Card program

A successful Corporate Card program begins with a well-planned implementation. Ultimate success depends on a coordinated and multidimensional approach.

Setting up a Corporate Card program can be looked at in two phases:

I. Evaluation and design

Evaluation of existing practices, selection of card options, identification of eligibility criteria, analysis of travel policies, program implementation processes

II. Communication of program implementation

Communication, training cardholders and relevant departments, documentation relating to travel policy compliance

Before handing out cards to your employees, devote time to the design and construction of your program. Time spent on Phase I and II activities will contribute to a smooth implementation and build a solid foundation for your program.

When you set up your program, take the time to explain its benefits to your employees. Employee acceptance and approval improve the chances of success. Implementing a well-planned communication strategy, complete with training activities, will help you maximize card usage, travel policy compliance and overall employee engagement.

The investment will ultimately increase program uptake by your employees and other stakeholders.

Phases I & II

Phase I: Evaluate and design

1. Assess the current situation
2. Define your ideal scenario by reviewing best practices and potential obstacles to implementation
3. Consider what changes, if any, you wish to make
4. Discuss your findings with your AirPlus sales manager
5. Review your travel practices and policies in relation to the options you have chosen
6. Identify any necessary changes to be made to your processes and contracts
7. Plan an implementation with AirPlus, taking both parties' schedules into account



What to consider in Phase I:

- What are your program's objectives and goals?
- What indicators would you like to put in place to measure your program's success?
- What are your data requirements?
- What controls would you like to put in place within your program?
- What obstacles and challenges do you anticipate within your company when implementing your AirPlus Corporate Card program?
- What internal changes do you anticipate that should be taken into consideration?
- Who are the key stakeholders involved in the process?
- What elements will make up the strategy, communication plan and tools needed to support your implementation?

Phase II: Communicating the program implementation

1. Review the official contract to make yourself aware of the options you have chosen for your AirPlus Corporate Card program
2. Make any necessary changes to your processes and contract documents
3. Invite involved departments to customize their internal communication

What to consider in Phase II:

- How will you specifically communicate the objectives and goals of your program?
- How will you communicate choices that have been made about your program?
- Communicate who is in charge of managing the card program within your company.
- Consider any changes that may occur within your company and how they may affect program implementation.
- What training have you planned for card users? How will you process expense reports, make AirPlus payments, manage the program's daily tasks, and monitor travel policies/processes?
- What are the strategy, communication plan and tools needed to support implementation?
- What means of communication do you have at your disposal to announce the AirPlus Corporate Card program (e.g., intranet, flyers, posters, presentation sessions, email)?

AirPlus support during implementation

AirPlus will support you throughout Phases I and II of the implementation of your Corporate Card program. Your AirPlus sales manager will be backed by a cross-functional team of experts.

Once implemented, your AirPlus Corporate Card program will be managed over the online AirPlus Portal, in conjunction with AirPlus customer support. Your implementation manager will be available for questions regarding your program's rollout and success.

Success factors for your implementation

Best Practices

- ✓ Set realistic deadlines
- ✓ Meet regularly with your AirPlus sales manager to progress through the key steps
- ✓ Gain the commitment and support of your cardholders
- ✓ Integrate all relevant stakeholders and functions in the design of the Corporate Card program (e.g., compliance, finance, tax, legal, HR)
- ✓ Keep the Corporate Card program and related policies simple – complexity confuses and can cause delays
- ✓ Ensure data protection requirements are met
- ✓ Devote time and energy to a properly planned implementation

Obstacles

- ✗ Insufficient understanding of existing travel policies and processes
- ✗ Lack of support from cardholders
- ✗ Limited communication to all parties influenced by the implementation of a Corporate Card program
- ✗ Lack of tangible benefits for users (e.g., lengthy reconciliation period, cumbersome admin processes, difficult approval process)

Focus on the steps of the implementation process

