

Insight. Action. Results.

Consulting:
Your Edge in Supplier Negotiations

is a world leading travel technology and services provider offering more than twenty software utilities for online booking, reservation, data intelligence, and process automation. We provide patented savings maximization solutions, travel analytics consulting practice, extended management services to travel buyers all over the world. We complement all of these offerings with

Presenters

Brian Tripplehorn
Director, Sourcing and Analytics
TRX, Inc.

Victor Johnson
Manager Hotel Practice
TRX, Inc.

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What We Can Provide

❑ Financial Savings

- Travel Strategy and Policy Assistance
- Strategic Sourcing Solutions
- Spend Monitoring and Optimization

❑ Experienced Consulting

- Comprehensive Solutions
- Respected by suppliers and clients alike
- Industry veterans who speak the language
- No supplier biases ensures objective analysis

❑ Truly Actionable Information

- Make sense of your travel data, (*in a timely manner*)
- Which carriers or hotels are my key drivers?
- What do market changes mean to my organization?
- What will changes within my company mean to my supplier base?

Differentiators

Truly an Independent Team

- Validate your air program with an objective, third party provider
 - Operate with no supplier bias.
 - No travel agency tie-ins



Patented Analytical Methods & Tools

- Highly Rigorous Analytics help uncover deeper savings opportunities faster
- Fully automated data process for the highest degree of accuracy
- Ability to include a wider variety of metrics, including ancillary fees



Benchmarking Against TRUE Operating Costs

- Compare your costs vs. airline's operating costs at the city pair level for your travel footprint



Our analytical offerings clearly STAND OUT among our competitors.

Areas of Expertise

❑ Air Sourcing Solutions

- Sourcing Strategy – In depth strategy study of company’s travel footprint
- RFP Management – Complete client partnership throughout the sourcing process
- Program Optimization – Contract goal evaluation and risk analysis

❑ Air Contract Performance Management

- Detailed analysis of carrier performance
- Monthly and/or quarterly reviews

❑ Ad Hoc Air Consulting

- Analysis of carrier pricing/target adjustments
- Assistance with changes to supplier landscape (Mergers/Joint Ventures/Route Changes)

❑ Hotel Sourcing Analytics

- Data Normalization and Matching
- Market Profiles and Clusters
- Strategic Savings Scenario Models
- Bid Logic

❑ CO2 Reporting

- “Top CO2 Calculator in the World” by SEI
- On-line Calculator
- Standard and Custom CO2 Reporting

Recent Partner List

- ✓ **Procter & Gamble**
- ✓ **Oracle**
- ✓ **PWC**
- ✓ **Hoffmann La-Roche**
- ✓ **WPP**
- ✓ **Nokia**
- ✓ **Fortune Brands**
- ✓ **Abbott Labs**
- ✓ **Deloitte**
- ✓ **ConAgra**
- ✓ **Ernst & Young**
- ✓ **Interpublic Group**
- ✓ **GSA**



85% Re-Engagement Rate

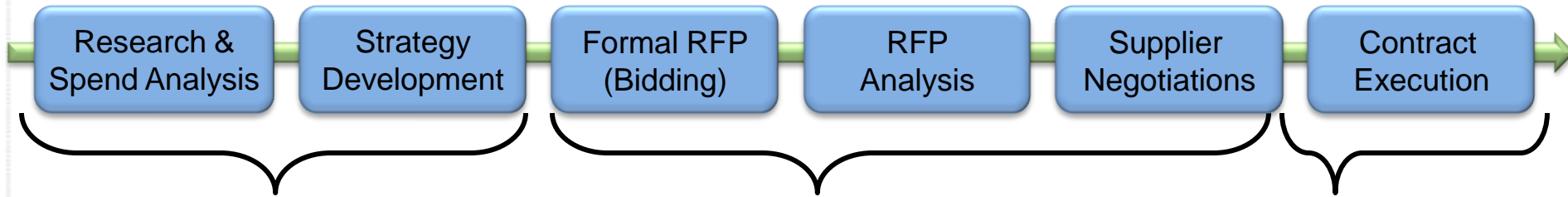
Background Information – State of the Airline Industry

- > **Industry Experts Forecast Year over Year Fare Increases in the Range of 6 to 11%**
 - Oil trading at approximately \$119 per barrel
 - Carrier labor costs are holding relatively steady

- > **Carriers continue to scramble to generate additional revenues**
 - Re-introduction or increasing fuel surcharges
 - Greater unbundling of services
 - Grounding older, less fuel efficient aircraft
 - Elimination of unprofitable routes

- > **Consolidation along with more unified Alliances and Joint Ventures (JV's)**
 - CO/UA Merger 75+% completed
 - AC/LH/UA(CO) JV becoming more cohesive
 - AF/DL/KL fairly entrenched as a Transatlantic partnership
 - AA/BA/IB is approved and proceeding steadily, although in the early stages

Air Sourcing Solutions



Sourcing Strategy

- In-depth strategy study of travel footprint
- Analytical review across at least 2,500 city pairs
- Over 100 carrier scenarios modeled to expose maximum savings opportunities
- Benchmarking against airlines operating costs by patented cost model analytics

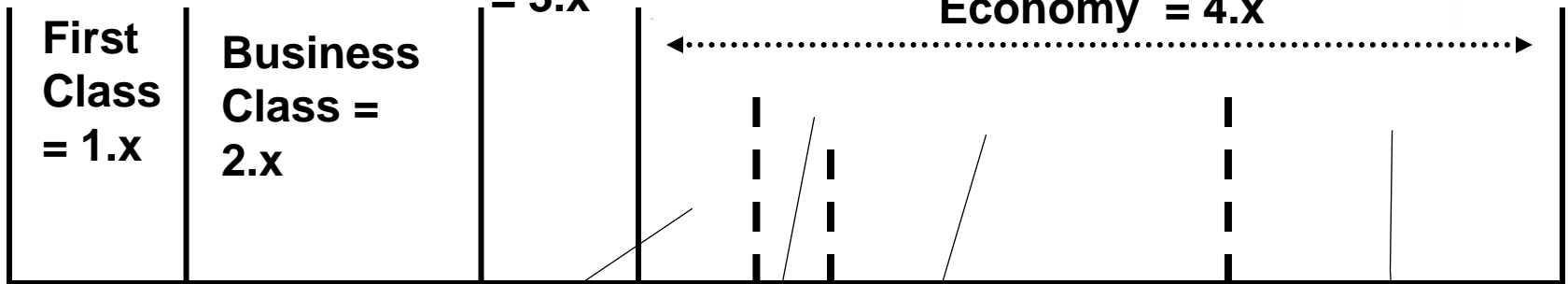
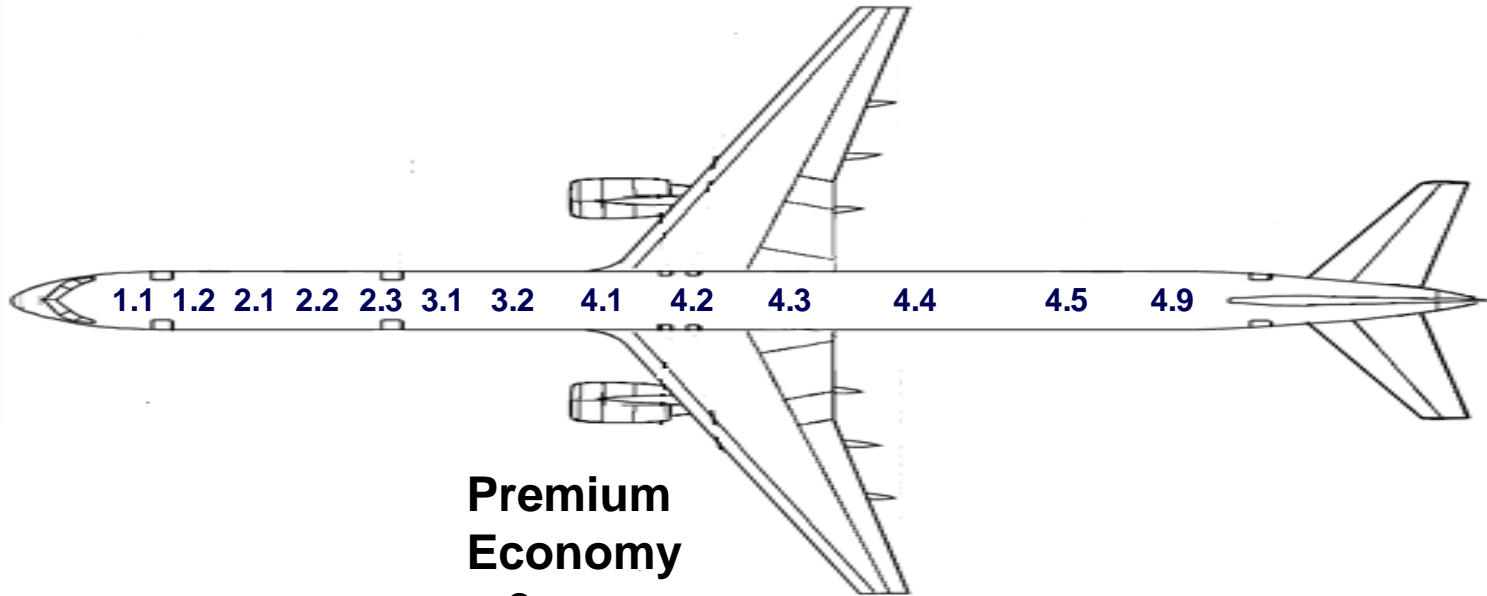
RFP Sourcing Management

- Complete client partnership through sourcing phase
- RFP documents creation and management
- Accelerated sourcing via Turbo-Sourcing
- Multi-Round savings and contract goals analysis
- Negotiation script creation and support

Program Optimization

- Airline contract goal performance evaluation
- Diagnosis of goal shortfalls
- Goal risk analysis
- Quarterly Business Review (QBR) Process Support
- Ongoing savings identification

The Travel Analytics System For Classifying Fare Types



X.1 = Unrestricted, e.g. Y, J, F

X.2 = Lightly Restricted, e.g. A, B, H

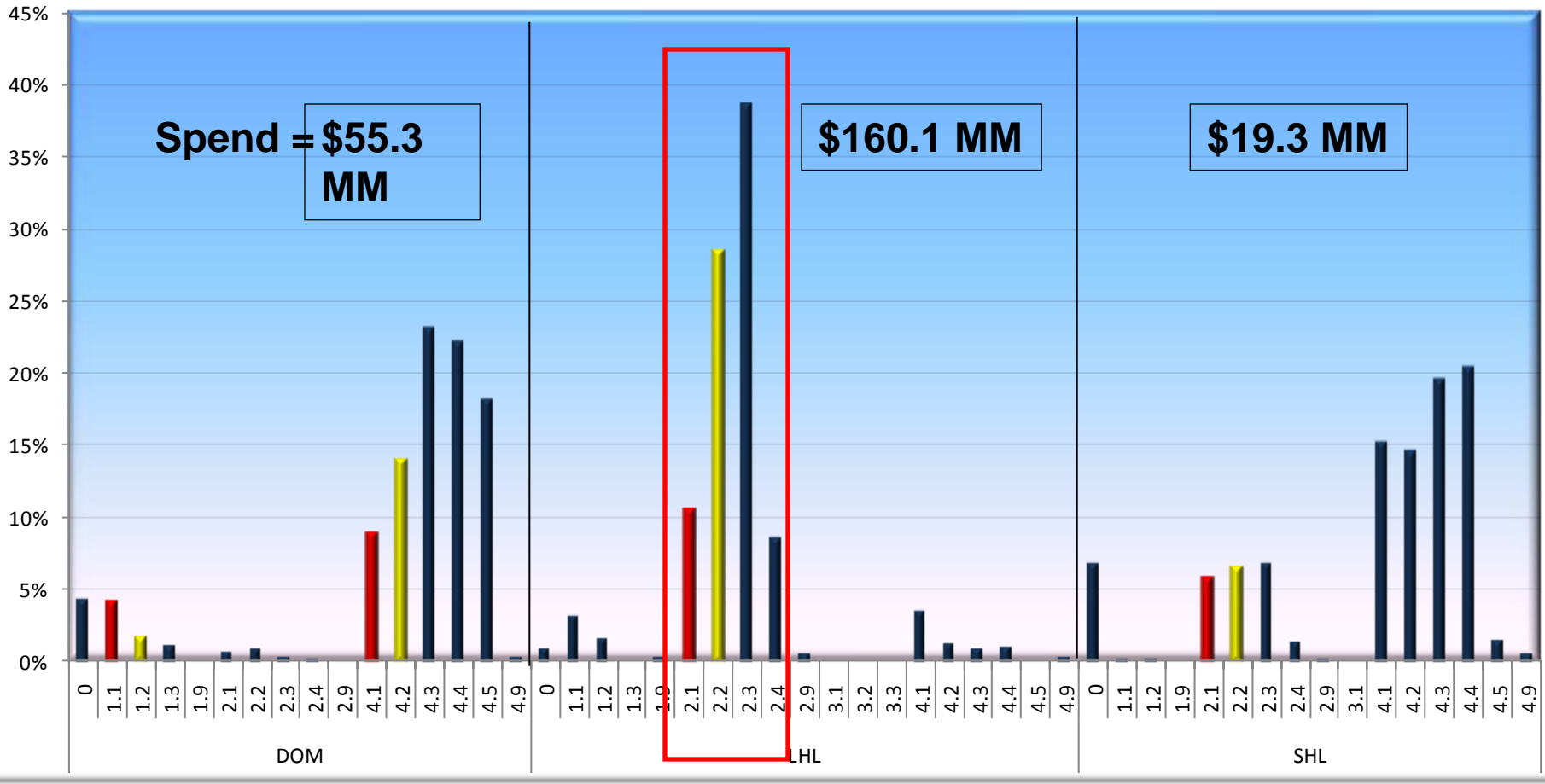
X.3 = Moderately Restricted, e.g. M, D

X.4 = Highly Restricted, e.g. V, T

87% Of ABC Co.'s Long Haul Spend Is Ticketed In Business Class Inventory Booking Codes

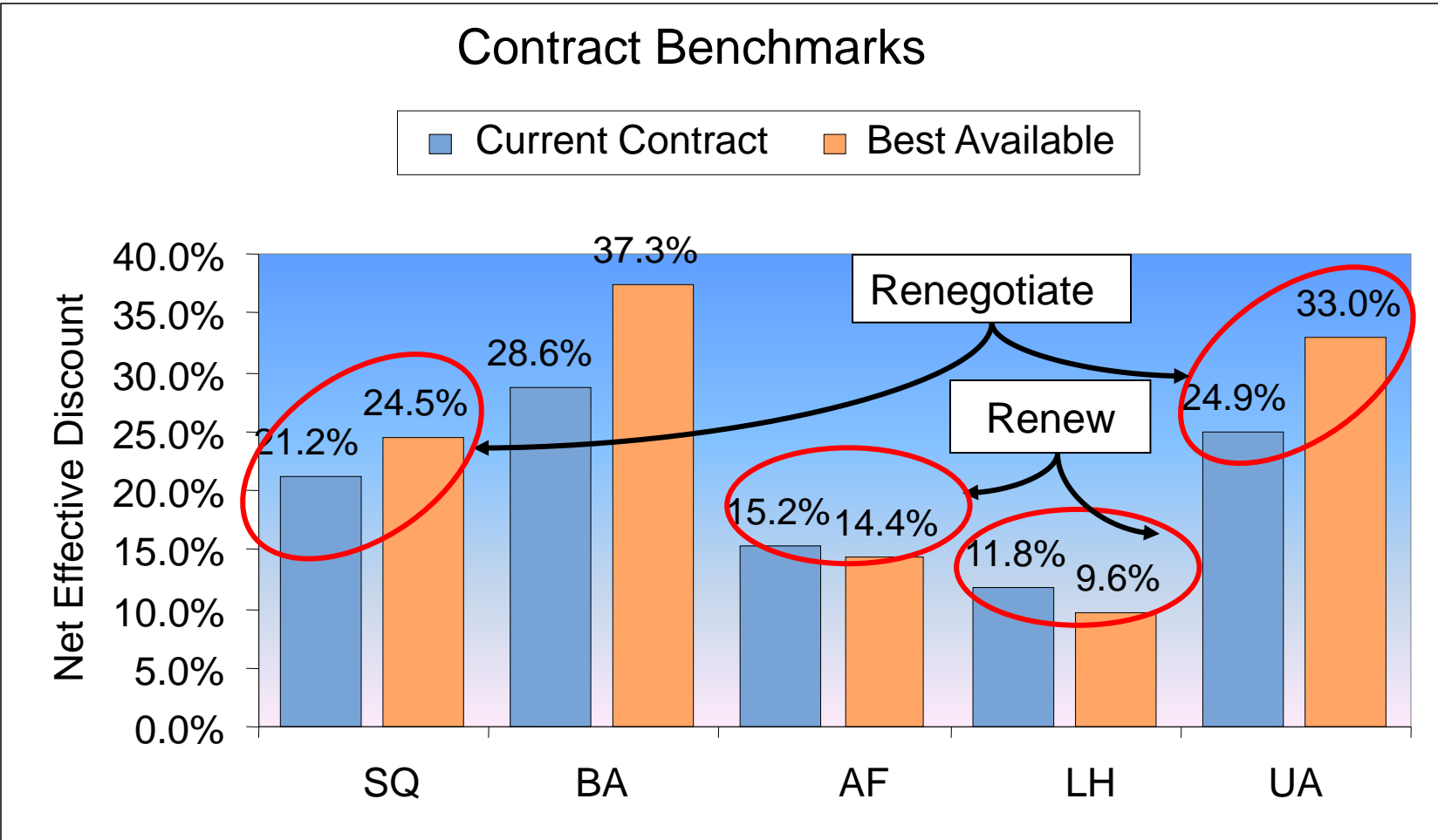
Inventory Booking Codes

Share of Spend by FX Code per Stage Length



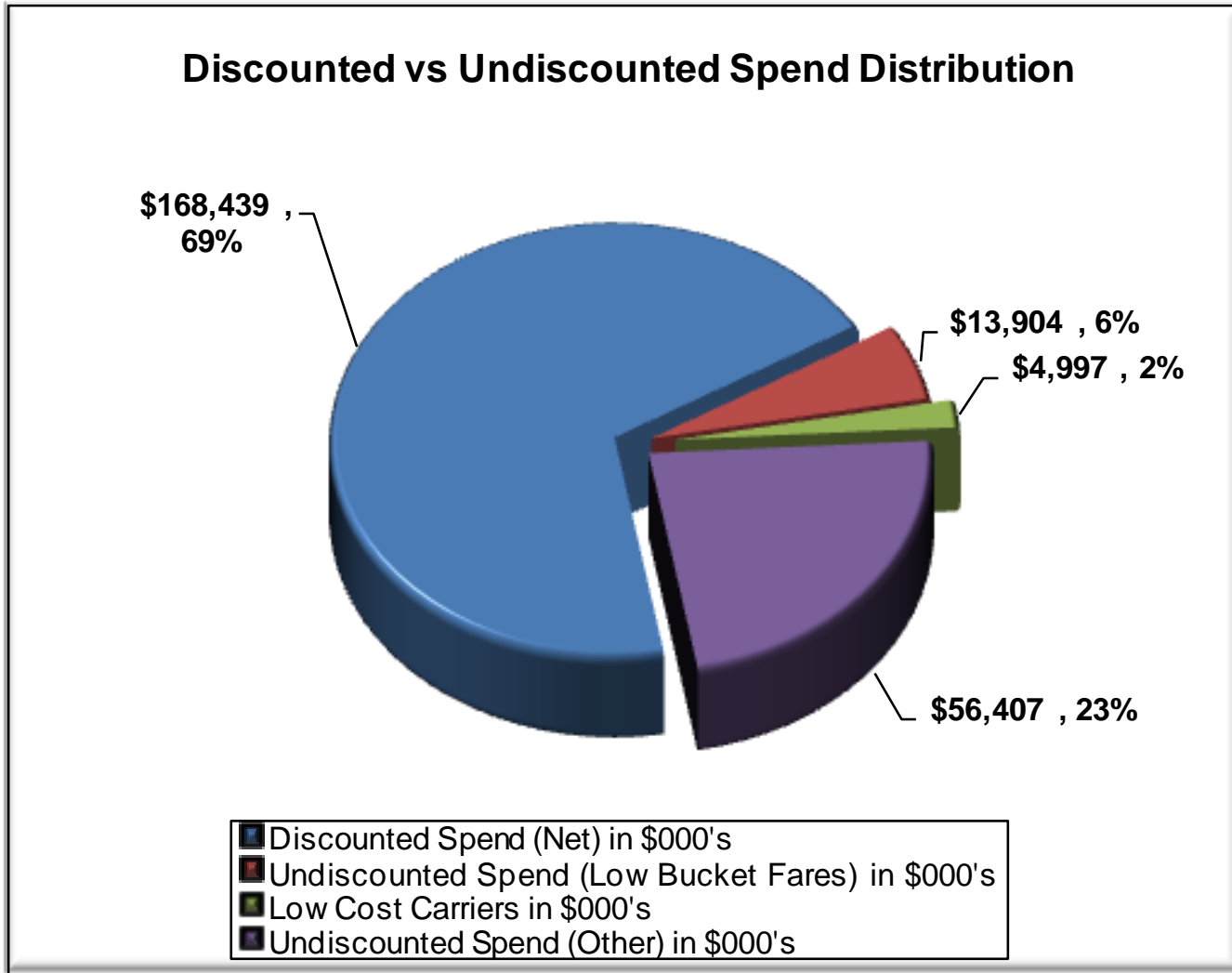
Understand Contract Performance Relative to Today's Market

Evaluate how well your contracts are performing relative to today's market

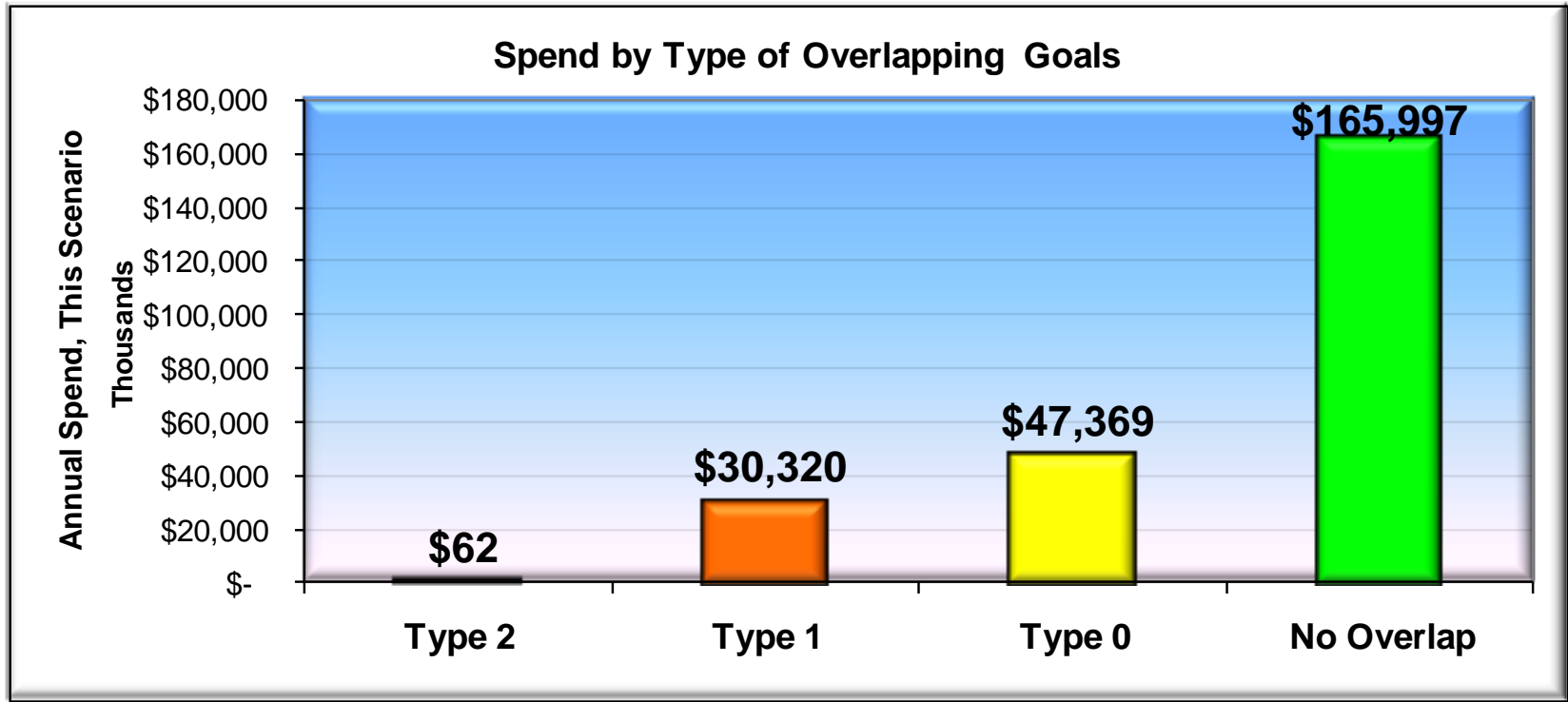


**Identify contracts that may be at risk to attack proactively or protect.*

Of The \$70MM Undiscounted Spend Not Booked On LCCs, Nearly \$14MM Is Booked In The Least Expensive "Low Bucket" Booking Codes



ABC Co.'s Overlapping Goal Markets



Overlapping Goals: Types and Definitions

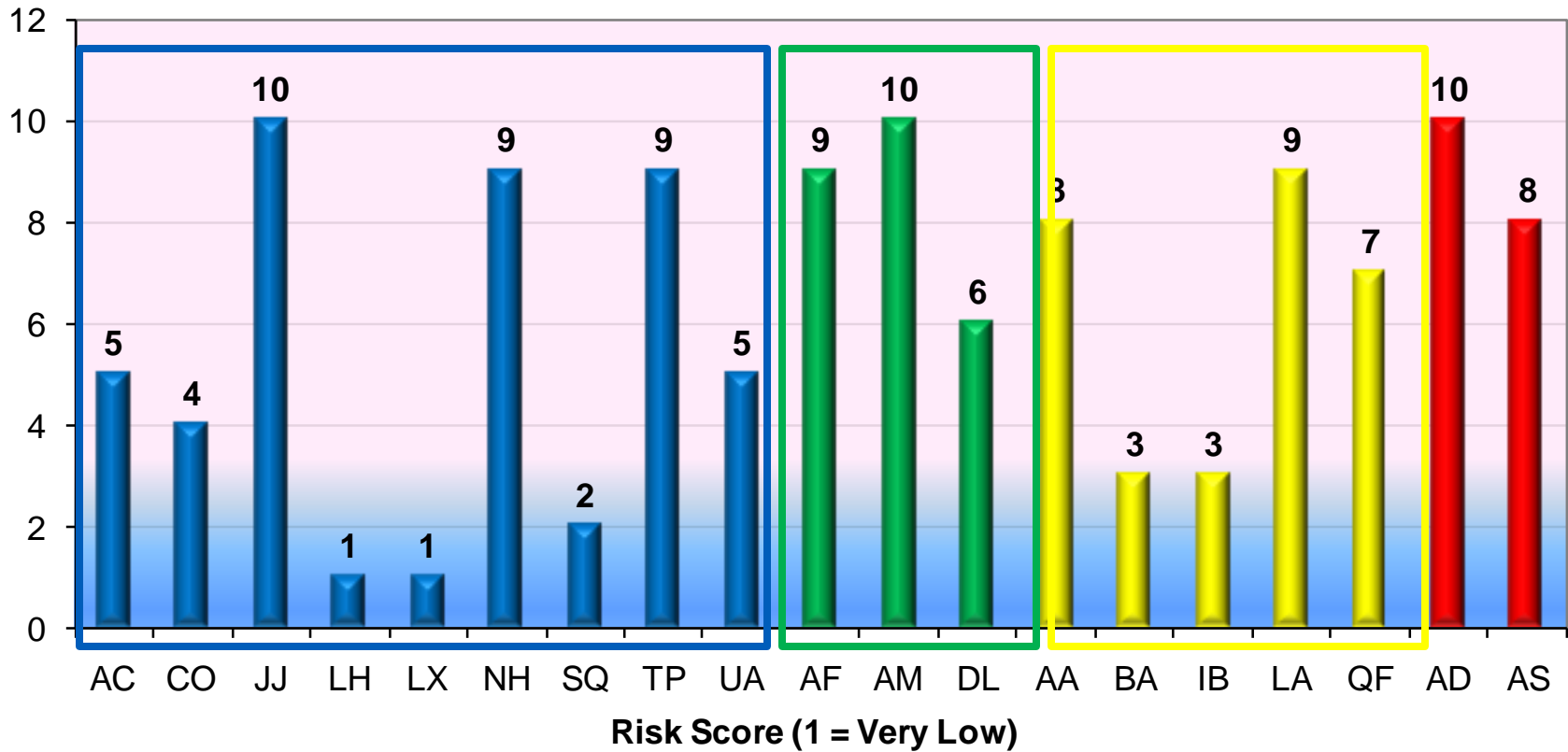
Type 2 Overlaps are very high risk. A Type 2 market has overlap, and has at least two carriers that have named the market as a single -market goal.

Type 1 Overlaps are high risk. A Type 1 market has overlap, and one carrier has made the market a single-market goal, meaning that 70% or more of the segments in the goal are expected to come from a single market.

Type 0 are moderately risky. A Type 0 market has overlap, but no carrier has made the market a single-market goal.

ABC Co.'s Overall Contract Risk Scores Range From 1 – 10 (Out of 10); 5 Indicates Moderate Risk, While 10 Indicates Unachievable Goals

Risk Scores by Carrier

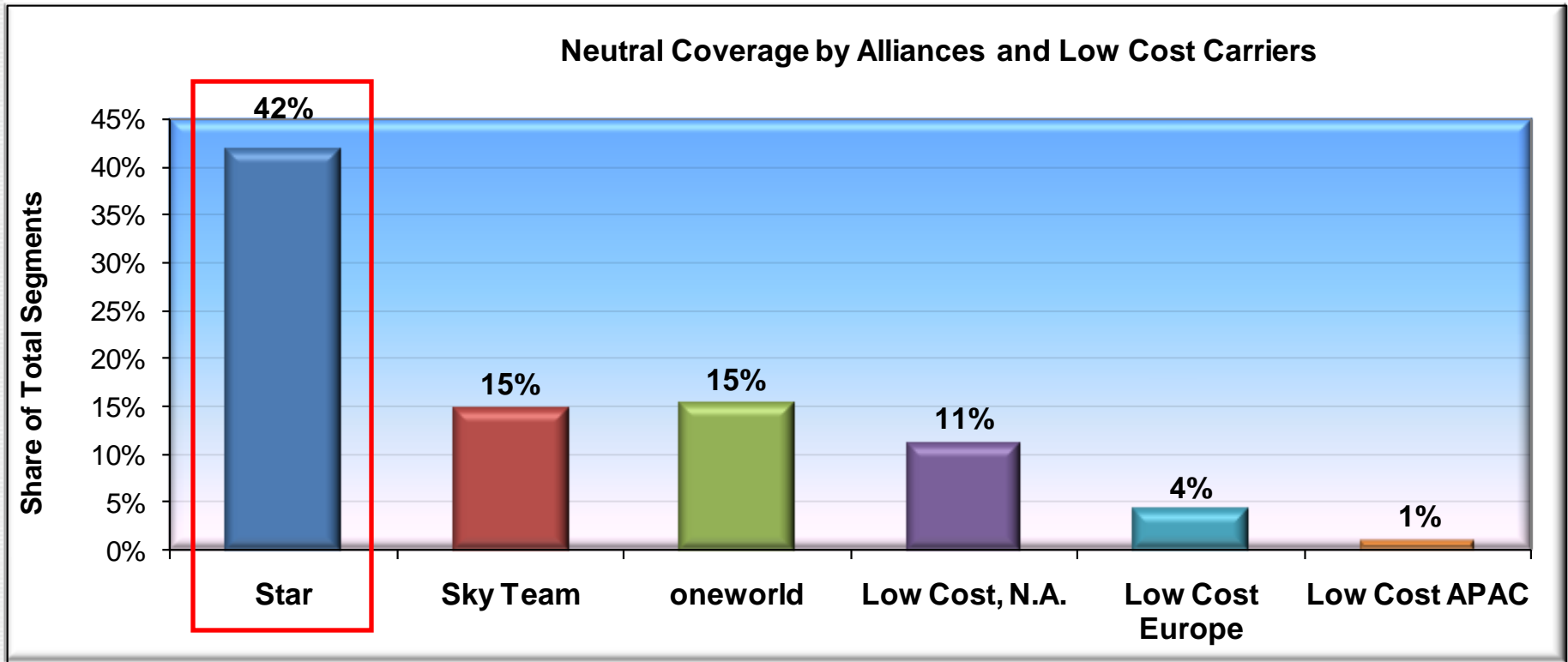


Star

SkyTeam

Oneworld

Star Offers The Best Alliance Coverage For ABC Co.



Key Carriers in the Top Alliances:

oneworld

American Airlines
British Airways
Iberia
Qantas Airways
Lan Airlines
Cathay Pacific Airways

Sky Team

Delta Air Lines
Air France
Aeromexico
Alitalia
Copa Airlines
KLM

Star

United Airlines
Lufthansa
SWISS
Continental Airlines
US Airways
Air Canada

Key Hotel Program Takeaways from Today's Session

- > **Insight - Learn how actionable information will help you**
 - Improve spend capture
 - Obtain greater insight into program compliance
 - Expand your alternatives
 - Simplify the bid process

- > **You'll also learn how "Clustering" is changing the procurement landscape**
 - Pre-sourcing analytics
 - Scenario modeling

- > **Understand how our approach can help**
 - Improve the overall procurement process
 - Bring greater insight into your program options

Sourcing and Procurement Market Needs

The Situation:

For years, travel managers have received reports from various sources including their TMCs and credit card providers. These reports have been very limited in scope; presenting only data about where money has been spent. From a practical standpoint, these types of reports offer little insight into the travel program.

"INSANITY
IS DOING THE
SAME THING OVER
AND OVER AND
EXPECTING A
DIFFERENT RESULT."

--ALBERT EINSTEIN

What the market wants:

Our program analysis should not only provide data on where the money was spent, but also where the money might better be spent and detail specific savings opportunities.



Best Practices Approach to Hotel Sourcing & Procurement



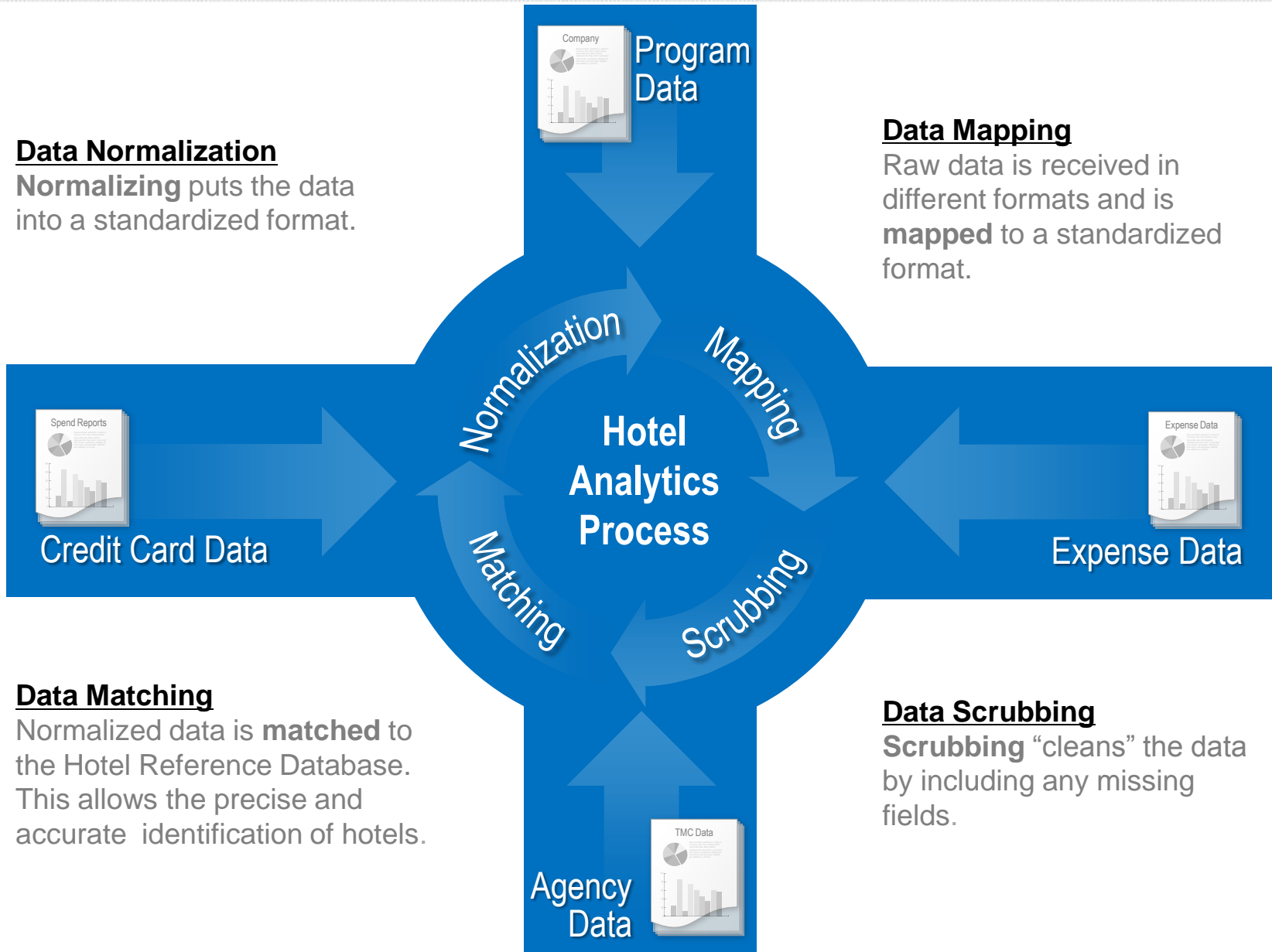
The Process: Data Analysis

Data Normalization

Normalizing puts the data into a standardized format.

Data Mapping

Raw data is received in different formats and is **mapped** to a standardized format.



Data Matching

Normalized data is **matched** to the Hotel Reference Database. This allows the precise and accurate identification of hotels.

Data Scrubbing

Scrubbing “cleans” the data by including any missing fields.

Consolidated Spend Report

| | A | B | C | D | E | F | G |
|----|---------|---------------------------------------|-------------------|-----------|-------------------|----------|---------|
| 1 | TRX ID | TRX Hotel Name | TRX Brand | TRX Chain | Address1 | City | State |
| 5 | 1268516 | HOMEWOOD SUITES BY HILTON COLUMBUS/D | HOMEWOOD SUITES | HILTON | 5300 PARKCENTER A | DUBLIN | OHIO |
| 7 | 1219707 | HILTON SACRAMENTO ARDEN WEST | HILTON HOTELS | HILTON | 2200 HARVARD ST | SACRAME | CALIFOF |
| 9 | 1243276 | EMBASSY SUITES HOTEL ON THE RIVER | EMBASSY SUITES | HILTON | 101 E LOCUST ST | DES MOIN | IOWA |
| 13 | 1278094 | HILTON GARDEN INN ATL EAST/STONECREST | HILTON GARDEN INN | HILTON | 7890 MALL RING RD | LITHONIA | GEORGI |
| 14 | 1254581 | HAMPTON INN | HAMPTON INN | HILTON | 4225 SW 40TH BLVD | GAINESVI | FLORIDA |
| 19 | 1331172 | HOMEWOOD SUITES HILTON | HOMEWOOD SUITES | HILTON | 5733 CLEVELAND ST | VIRGINIA | VIRGINI |
| 20 | 1290443 | HAMPTON INN & SUITES COLUMBUS POLARIS | HAMPTON INN | HILTON | 8411 PULSAR PL | COLUMBU | OHIO |
| 23 | 1248986 | HOMEWOOD SUITES BY HILTON CHARLOTTE M | HOMEWOOD SUITES | HILTON | 8340 N TRYON ST | CHARLOTT | NORTH |
| 25 | 1278079 | HOMEWOOD SUITES BY HILTON BIRMINGHAM | HOMEWOOD SUITES | HILTON | 215 INVERNESS CEN | BIRMINGH | ALABAM |
| 27 | 1222836 | HILTON COLUMBIA | HILTON HOTELS | HILTON | 5485 TWIN KNOLLS | COLUMBIA | MARYLA |
| 28 | 1241701 | HAMPTON INN | HAMPTON INN | HILTON | 1577 GATEWAY BLV | RICHARDS | TEXAS |
| 29 | 1254607 | HAMPTON INN | HAMPTON INN | HILTON | 4230 UNION DEPOS | HARRISBU | PENNSY |
| 35 | 1327934 | EMBASSY SUITES TESTS HOTEL | EMBASSY SUITES | HILTON | 755 CROSSOVER LN | MEMPHIS | TENNES |
| 39 | 1264341 | HAMPTON INN & SUITES | HAMPTON INN | HILTON | 5001 S ULSTER ST | DENVER | COLORA |
| 44 | 1288956 | HOMEWOOD SUITES BY HILTON EL PASO ARP | HOMEWOOD SUITES | HILTON | 6656 GATEWAY BLV | EL PASO | TEXAS |
| 50 | 1273650 | HOMEWOOD SUITES BY HILTON | HOMEWOOD SUITES | HILTON | 249 RUCCIO WAY | LEXINGTO | KENTUC |
| 51 | 1274239 | HAMPTON INN ATLANTA NE I-85 | HAMPTON INN | HILTON | 6010 SUGARLOAF PI | LAWRENC | GEORGI |
| 52 | 1219671 | DOUBLETREE HOTEL SACRAMENTO | DOUBLETREE | HILTON | 2001 POINT W WAY | SACRAME | CALIFOF |
| 53 | 1260766 | HOMEWOOD SUITES BY HILTON CRABTREE | HOMEWOOD SUITES | HILTON | 5400 HOMEWOOD E | RALEIGH | NORTH |
| 60 | 1279175 | HAMPTON INN SUITES IR | HAMPTON INN | HILTON | 370 COMMERCE ST | LITTLE R | ARKANS |

Action: Hotel Strategy Assessment & Planning

- > **Clustering analysis produces actionable insights uncovering opportunities to reduce corporate expenditures and increase corporate hotel policy compliance.**

- > **Action plans are readily devised using a series of outputs including:**
 - Hotel property “Bid List”
 - Financial impact of switching to another hotel chain or brand
 - Financial impact of “Tiering Down”
 - Compliance measurement and on-going monitoring
 - Corporate hotel policy recommendations
 - Comparisons of quarterly and yearly hotel costs and compliance

Hotel Strategy Study Example

Challenge:

International audit firm with a vast global footprint, suspected additional savings could be achieved through improvements and modifications to their hotel program.

Markets Evaluated:

- Beijing
- Dubai
- Helsinki
- Munich



Results:

- Key recommendations made to drive additional savings in the areas
 - Compliance
 - Vendor negotiation
 - Tier down savings



HOTEL STRATEGY STUDY

- Agency & Preferred Data Analysis
- Strategic Market Segmentation
- Hotel Program Compliance
- Tier Down Savings
- Scenario Savings Opportunities
- Results

Executive Summary: Agency & Preferred Data Analysis

> Summary of analysis for major audit firm

- 4 cities analyzed: Beijing, Dubai, Helsinki, Munich
- Agency Data for April 2009 – March 2010
- Preferred Data – calculated weighted average rate for this time period

| Agency Data Summary: | Totals | |
|---|--------------|-------|
| Agency total | \$15,151,201 | |
| Agency; matched to reference database | \$15,119,854 | 99.8% |
| Agency; unmatched | \$31,347 | 0.2% |
| Agency; hotel maximum unmatched spend | \$984 | |
| Agency; hotel maximum unmatched room nights | 10 | |
| | | |
| | | |
| *We purposefully excluded hotels with total spend of less than \$1,000 as being unimportant for this report | | |

| Preferred Data Summary: | Totals | |
|-------------------------|--------|------|
| Preferred total | 77 | |
| Preferred matched | 77 | 100% |
| Preferred unmatched | 0 | 0% |

Executive Summary: Clustering Analysis

> Results:

- Major audit firm’s hotel data included over 100,000 room nights in 233 booked hotels segmented into 63 clusters.
 - Overall Average Booked Rate (ABR) \$150
 - Less than 1% of the spend was booked outside of cluster boundaries for the 4 cities examined

| | Number of Hotels | Room Nights | Spend | Average Room Rate |
|--|------------------|-------------|---------------|-------------------|
| All hotels, including no stays | 754 | 100,866 | \$ 15,119,854 | \$ 150 |
| Booked hotels | 233 | 100,866 | \$ 15,119,854 | \$ 150 |
| Orphan hotels (low stay, outside clusters) | 51 | 442 | \$ 79,330 | \$ 179 |
| Booked hotels in Clusters | 182 | 100,424 | \$ 15,040,524 | 150 |
| Non-booked hotels in Clusters | 524 | - | \$ - | - |
| Total hotels in clusters | 706 | 100,424 | \$ 15,040,524 | 150 |

* Clustering also known as Strategic Market Segmentation is a TRX patent-pending statistical clustering methodology which buckets hotels into neighborhood level groupings

Executive Summary: Hotel Program Compliance

> Results:

- Overall Hotel Program Compliance was 83% - FAIR
- Core Hotel Program Compliance (Clustered Markets) was 95% in those markets where a preferred hotel is available – GOOD
- ADR ~\$150 for markets with and without preferred hotels.
 - Implication: Company ABC could be more aggressive in pursuing discounts for the Preferred Hotel Program(s)


Hotel Program Compliance Analysis

| | Total | | | Non-Preferred | | | Preferred | | | Room Night Compliance | Spend Compliance |
|--------------------------------------|---------|--------------|---------------|---------------|-------------|---------------|-----------|--------------|---------------|-----------------------|------------------|
| | RNs | Spend | Avg Room Rate | RNs | Spend | Avg Room Rate | RNs | Spend | Avg Room Rate | | |
| All booked hotels, all markets | 100,866 | \$15,119,854 | \$150 | 17,354 | \$2,610,355 | \$150 | 83,512 | \$12,509,500 | \$150 | 83% | 83% |
| Markets with Preferred | 100,646 | \$15,086,550 | \$150 | 17,134 | \$2,577,050 | \$150 | 83,512 | \$12,509,500 | \$150 | 83% | 83% |
| Markets without Preferred | 220 | \$33,304 | \$151 | 220 | \$33,304 | \$151 | 0 | \$0 | - | 0% | 0% |
| All booked hotels, clustered markets | 100,424 | \$15,040,524 | \$150 | 16,912 | \$2,531,024 | \$150 | 83,512 | \$12,509,500 | \$150 | 83% | 83% |
| Clustered Markets with Preferred | 87,573 | \$13,154,863 | \$150 | 4,061 | \$645,363 | \$159 | 83,512 | \$12,509,500 | \$150 | 95% | 95% |
| Clustered Markets without Preferred | 12,851 | \$1,885,661 | \$147 | 12,851 | \$1,885,661 | \$147 | 0 | \$0 | - | 0% | 0% |

Understanding Tier Down Savings Analysis

We examine each cluster and the quality rating of hotels within that cluster. We calculate the savings that can be gained by downgrading by 1 tier (e.g. a 5.0 hotel to a 4.5 hotel) or by 2 tiers (e.g. a 5.0 hotel to a 4.0 hotel).

| TRX Brand Rating | One-tier downgrade | Two-tier downgrade |
|------------------|--------------------|--------------------|
| 5.0 | 4.5 | 4.0 |
| 4.5 | 4.0 | 3.8 |
| 4.0 | 3.8 | 3.5 |
| 3.8 | 3.5 | 3.3 |
| 3.5 | 3.3 | 3.0 |



| Brand Rating | Market Tier | Service Level | Examples |
|--------------|-------------------|-------------------|--------------------------------|
| 5.0 | Luxury | Full Service | Conrad Hilton, Four Seasons |
| 4.5 | Upper Upscale | High End Service | JW Marriott, Renaissance |
| 4.0 | Upper Upscale | Full Service | Embassy Suites, Grand Hyatt |
| 3.8 | Upscale | Full Service | Ramada, Holiday Inn |
| 3.5 | Upscale | Limited | Courtyard, Hilton Garden Inn, |
| 3.3 | Midscale | Full Service | Quality Inn, Best Western |
| 3.0 | Midscale | Limited | Holiday Inn Express, La Quinta |
| 2.9 | Independent/Mixed | Independent/Mixed | UNCLASSIFIED HOTELS |
| 2.0 | Economy | Limited | Days Inn, Red Roof Inns |
| 1.0 | Budget | Limited | HoJo Express, Microtel Inn |

Executive Summary: Scenario Savings Opportunities

> Results:

- Scenario savings opportunities for the major audit firm:
 - Improved compliance by 50%: \$106K
 - Negotiation opportunities (lower available non-preferred rate): \$140K
 - Chain discounts: \$45K
 - Rate variance loss: \$660K
 - Tier down savings (1-2 levels): \$190K
- Savings already achieved by “Thrifty Travelers”:
 - Same quality, lower rate, non-preferred hotel nearby: \$26K

Scenario Savings Opportunities

| Improved Compliance | Negotiation Opportunities | Chain Discounts | Rate Variance Loss | Tier Down (1- 2 Levels) | Thrifty Traveler |
|---------------------|---------------------------|-----------------|--------------------|-------------------------|------------------|
| \$106K | \$140K | \$45K | \$660K | \$190K | \$26K |

Improved Compliance Savings - \$106K

Improved Compliance savings consist of those opportunities where savings can be achieved if employees stay at Preferred hotels where the rate is lower than nearby non-preferred hotels. The Savings Opportunity is calculated based on a 50% improvement in compliance. The top 10 US hotels are presented below.

| State | Cluster City | Top Preferred Hotel | Top Non-Preferred Hotel | Prf'd. RNs | Prf'd. Avg. Room Rate | Non-Prf'd. RNs | Non-Prf'd. Avg. Room Rate | Prf'd Avg. Rate is (Lower) Higher than Non-Prf'd by | Compliance Savings Oppty. |
|--------------------|---------------|---|--|------------|-----------------------|----------------|---------------------------|---|---------------------------|
| IOWA | MOINES | HOLIDAY INN HOTEL & STES, DES MOINES NW 4800 MERLE HAY RD, URBANDALE, 50322 | HOTEL FORT DES MOINES 1000 WALNUT ST, MOINES, 50309 | 5 | \$79 | 173 | \$137 | (\$58) | \$5,041 |
| COLORADO | DENVER | HYATT PLACE DENVER TECH CENTER 8300 E CRESCENT PKWY, GREENWOOD VILLAGE, 80111 | HILTON GARDEN DENVER TECH CENTER PLAZA 7675 E UNION AV, DENVER, 80237 | 70 | \$105 | 135 | \$164 | (\$59) | \$3,966 |
| NORTH CAROLINA | RALEIGH | FAIRFIELD INN BY MARRIOTT 2201 SUMMIT PARK LN, RALEIGH, 27612 | HOMWOOD SUITES BY HILTON CRABTREE 5400 HOMEWOOD BANKS DR, RALEIGH, 27612 | 135 | \$64 | 86 | \$156 | (\$92) | \$3,958 |
| DISTRICT OF COLUMB | WASHINGTON | MARRIOTT WARDMAN PARK HOTEL 2660 WOODLEY RD NW, WASHINGTON, 20008 | GRAND HYATT WASHINGTON 1000 H ST NW, WASHINGTON, 20001 | 14 | \$144 | 100 | \$202 | (\$58) | \$2,902 |
| CALIFORNIA | SAN FRANCISCO | HILTON SAN FRANCISCO 333 OFARRELL ST, SAN FRANCISCO, 94102 | MARRIOTT SAN FRANCISCO 55 4TH ST, SAN FRANCISCO, 94103 | 2 | \$112 | 75 | \$181 | (\$69) | \$2,597 |
| ILLINOIS | DOWNERS GROVE | MARRIOTT SUITES 1500 OPUS PL, DOWNERS GROVE, 60515 | EMBASSY SUITES 707 E BUTTERFIELD RD, LOMBARD, 60148 | 22 | \$83 | 33 | \$236 | (\$153) | \$2,524 |
| ILLINOIS | CHICAGO | HYATT REGENCY CHICAGO 151 E WACKER DR, CHICAGO, 60601 | EMBASSY SUITES CHICAGO LAKEFRONT 511 N COLUMBUS DR, CHICAGO, 60611 | 47 | \$199 | 59 | \$263 | (\$65) | \$1,909 |
| PENNSYLVANIA | CRANBERRY TWP | FOUR POINTS BY SHERATON PITTSBURGH NORTH 910 SHERATON DR, MARS, 16046 | RESIDENCE INN MARRIOTT 1308 FREEDOM RD, CRANBERRY TWP, 16066 | 29 | \$76 | 83 | \$107 | (\$31) | \$1,283 |
| OHIO | COLUMBUS | CROWNE PLAZA NORTH 6500 DOUBLETREE AVE, COLUMBUS, 43229 | HILTON COLUMBUS POLARIS 8700 LYRA DR, COLUMBUS, 43240 | 14 | \$92 | 24 | \$195 | (\$104) | \$1,243 |
| CALIFORNIA | LOS ANGELES | CROWNE PLAZA LOS ANGELES INT'L AIRPORT 5985 W CENTURY BLVD, LOS ANGELES, 90045 | HYATT REGENCY CENTURY PLAZA HOTEL 2025 AVE OF THE STARS, LOS ANGELES, 90067 | 6 | \$99 | 22 | \$200 | (\$101) | \$1,107 |

Hotel Strategy Case Study – Actionable Results Delivered

Challenge:

International audit firm with a vast global footprint, suspected additional savings could be achieved through improvements and modifications to their hotel program.

Markets Evaluated:

- Beijing
- Dubai
- Helsinki
- Munich



Results:

- Key recommendations made to drive additional savings in the areas
 - Compliance
 - Vendor negotiation
 - Tier Down Savings



HOTEL STRATEGY STUDY RESULTS

Actionable path
to save
\$1.1 Million
in annual spend

TRX's Hotel Sourcing & Procurement Approach

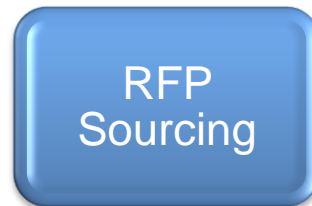
- Rigorous data normalization & matching procedures
- >150K Hotels in Database



- Patent-Pending analysis methodology - "Clustering"
- Savings Scenario Modeling
- Automated Bid List



- Compliance Monitoring
- YOY Variances
- Forecast Savings



- Integrated 3rd Party Benchmarks
- Total RFP Process Management
- Third Party Partnerships support on-line RFP solutions

Questions & Answers



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About TRX Travel Analytics

- > TRX Travel Analytics provides premium high quality spend management services to travel and procurement managers around the world. We help clients to identify, quantify, capture, and track travel-related savings, reduce contract risks, protect contracted savings, and improve travel policies and practices. Our rigorous analytically-driven services help clients build world class travel programs.**
- > Next generation and patent-pending methodologies designed to enable strategic management and maximize savings opportunities through improved compliance, intense scenario modeling, and automated bid logic.**

THANK YOU