CBT UX Enhancements for SWABIZ R4+: Part 1

SWA UX Design

December 18, 2018

January 15, 2019

Objective
What problem are we trying to solve?

Questions:

- *What are the high-value user-facing features and UX enhancements for SWABIZ R4+?*
- *What are their parameters and UI considerations?*
- *How do they map to the SWABIZ roadmap?*

Sources:

- SWABIZ SME Booking Channel Workshop Pre-Read
- CBT Benchmarking Consolidated Report
- Discussions with SWABIZ team
- UX Design analysis

Southwest

Recommended SWABIZ Enhancements
Recommendations have been made for new SWABIZ features

Suggested enhancements include:

- Omni-Channel UX

- Multi-Pax booking enhancements

- Enhanced Duty of Care features

- Enforce and track traveler policy compliance

- Enhanced reporting features

- More third-party integration

- Other enhancements

Southwest

Enhancements: Current Discussion

To keep the discussion's scope manageable, this presentation (Part 1) will focus on:

✓Omni-Channel UX   Reviewed 12-18-18

✓Multi-Pax booking enhancements   Reviewed 12-18-18

• Enhanced Duty of Care features

• Enforce and track traveler policy compliance

Other features will be evaluated and discussed in subsequent presentations.

Southwest

Summary: Booking tool and reporting design principles
Survey and research insights help to surface a few 'principles' that can guide decisions related to booking channel

SWABIZ should exhibit these key design principles:

1. **CTM one-stop shop:** SWABIZ will serve as the primary CTM access point for Southwest's SME offering.

2. **Value-oriented:** Focus on value-added CTM services, build trust so that CTMs feel they are receiving the best value.

3. **Set and forget:** Travel management in SWABIZ is not a daily task for someone in the Travel Administrator role. Allow Travel Administrator to set policies and enter one-time data without dealing with daily minutia.

4. **Invest where it matters (and not where it doesn't):** Focus on features that add value to customer, build Southwest brand, and contribute to the bottom line.

5. **Traveler experience consistent with .com:** As part of the Customer Journey, deliver the right functionality at the right time in the right channel. This seamless in-brand experience will include Southwest.com

Southwest

Enhancement | Omni-Channel UX Strategy

Executive Summary: Omni-Channel UX Strategy

Per 12-18-18 Discussion

Omni-Channel UX Strategy delivers the right functionality at the right time and in the right channel as part of the Customer journey.

Different channels offer different capabilities and are used in different contexts. We can leverage these to deliver unique experiences that are consistent, "in-brand", and seamless parts of the overall Southwest Customer Experience.

Customer and user research to inform and validate this Omni-Channel UX Strategy is critical.

Omni-Channel UX Strategy
What are we trying to solve?

Deliver the right functionality at the right time in the right channel as part of the Customer Journey.
This results in a consistent, seamless, "in-brand" experience for users across all channels.

Doesn't mean all channels support all tasks for all users at all times.

This strategy considers:
- Users' roles, attributes, and goals
- Channels' SWA product (Leisure, Business)
- Channels' technology

Southwest®

Omni-Channel UX Strategy

Consider these factors for omni-channel Southwest business booking/travel strategy.

User Roles	Tasks Supported	Context of use	Technologies	Products
Travel Administrator	[Identify requirements]	Home	Desktop Web	SWABIZ
Travel Arranger		Office	Mobile Web	Southwest.com
Business Traveler		Mobile	Mobile App	
		More detailed context…	Messaging	

Messaging:
- Email
- Push notifications
- Mobile app notifications
- Desktop notifications
- Inline travel advisories

Southwest

Omni-Channel UX Strategy
Potential Tasks

User: **Travel Administrator**
Product: **SWABIZ**

Different channels have different **Contexts of Use** and **Technology Capabilities.**

Additional detail can be found in Appendix 1A:
Potential User Tasks by Channel

Channel	Task
Desktop Web	• Create and modify Traveler bookings; incl. ancillaries, car, and hotel • Manage Traveler, Travel Arranger, Ghost Card, IRN • View and redeem Corporate RR Points • Generate Reports • Manage travel policy and enforcement
Mobile Web	• Create and modify Traveler bookings; incl. ancillaries, car, and hotel
Mobile App	• Create and modify Traveler bookings; incl. ancillaries, car, and hotel
Messaging	• As configured: • Receive TRM alerts, including Flight In Trouble (FIT). • Violations of fare/class policy?

Southwest

Omni-Channel UX: Technology Context of Use
Environment an important factor in channel design.

What are the CTM's needs in this environment? What are our opportunities?

Examples:

Channel	Location	Requirements	Usage Notes
Desktop Web	Desktop: Office, home Laptop: Office, home, remote	Web access	Remote laptop use has overhead: connectivity, power, space (seated/standing), time.
Mobile App	Anywhere	Mobile data	Overhead: app installation

Details for all channels can be found in Appendix 1B: Technology Context of Use

Southwest

Omni-Channel UX: Technology Capabilities
Different channels support different types of interactions.

What types of interactions does the channel support? What are its strengths? What unique capabilities does it offer?

Examples:

Channel	Display	Input	UI Rules	Other Resources	Awareness, w/permission
Desktop Web	Desktop or laptop	Keyboard, mouse/touchpad	Desktop browser	Desktop web, desktop, mobile web, mobile	Location (limited)
Mobile App	Mobile	Touch keyboard or STT, touch	Mobile OS	Mobile web (limited), mobile (limited)	Location, other sensors, WiFi, Bluetooth, NFC

Details for all channels can be found in Appendix 1C: Technology Capabilities

Southwest

Enhancement | Multi Pax Booking Improvements

Executive Summary: Multi-Pax Booking Enhancements
Per 12-18-18 Discussion

True multi-pax booking gives us the opportunity to examine a key SWABIZ assumption about how multi-passenger corporate travel is funded:

Does corporate travel billing work the same as leisure travel, where a single Traveler pays for all Travelers' tickets?

Switching to a multi-PNR model where each Traveler pays for her respective travel could better map to corporate travel billing practices and offer benefits in trip management and Traveler privacy.

The proposed model is one potential solution for one potential problem. Customer and user research to gauge pain points and validate decisions is critical.

Multi Pax Booking
What are we trying to solve?

In the current SWABIZ multi pax booking model, all Passengers in a trip are assigned a single PNR. All of the Passengers' travel is paid for by a single ("Primary") Passenger.

Is this built upon valid assumptions about SME business travel?

Multi passenger travel booking may be more similar to individual single pax bookings. Passengers share O&D + Date/Time, but each Passenger is responsible for payment of his/her own travel.

What are the implications of shifting to a multi pax, individual PNR booking solution?

Southwest

Multi Pax Booking: Assumption
Methods of payment

Assumption: A Primary Passenger *is fiscally responsible for/shares fiscal responsibility with* all other passengers.

Southwest.com:

Primary Passenger is the booking passenger ("Mom or Dad Booking").

SWABIZ:

Due to technical limitations, Travel Arrangers have booked travel as a proxy for the Primary Passenger. When we implement true third-party booking (including multi-pax) for Travel Arrangers, does Primary status reflect a real relationship?

Single PNR Booking: Southwest.com

User	Books a trip for	Using FOP
Passenger A	Passenger A	Passenger A

	User	Books a trip for	Using FOP
Mom or Dad Booking	Passenger A	Passenger A Passenger B Passenger C Passenger D	Passenger A

All of these Passengers share a single PNR.

Southwest®

Single PNR Booking: SWABIZ

User	Books a trip for	Using FOP
Passenger A	Passenger A	Passenger A
CTM Proxy for Passenger A	Passenger A	Passenger A
CTM Proxy for Passenger A	Passenger A Passenger B Passenger C Passenger D	Passenger A

Is this valid for business travel?

All of these Passengers share a single PNR.

Early proposals for potential booking flow can be found in Appendix 3: Potential Multi Pax Booking Flows

Southwest

Multi Pax with Single PNR
Current Conceptual Model

Multi Pax with Individual PNRs
New Conceptual Model

Booking Session			
Trip			
O&D + Date/Time			
Passenger A PNR A	Passenger B PNR B	Passenger C PNR C	Passenger D PNR D
Payment	Payment	Payment	Payment
Car	Car Shared	Car Shared	Car Shared
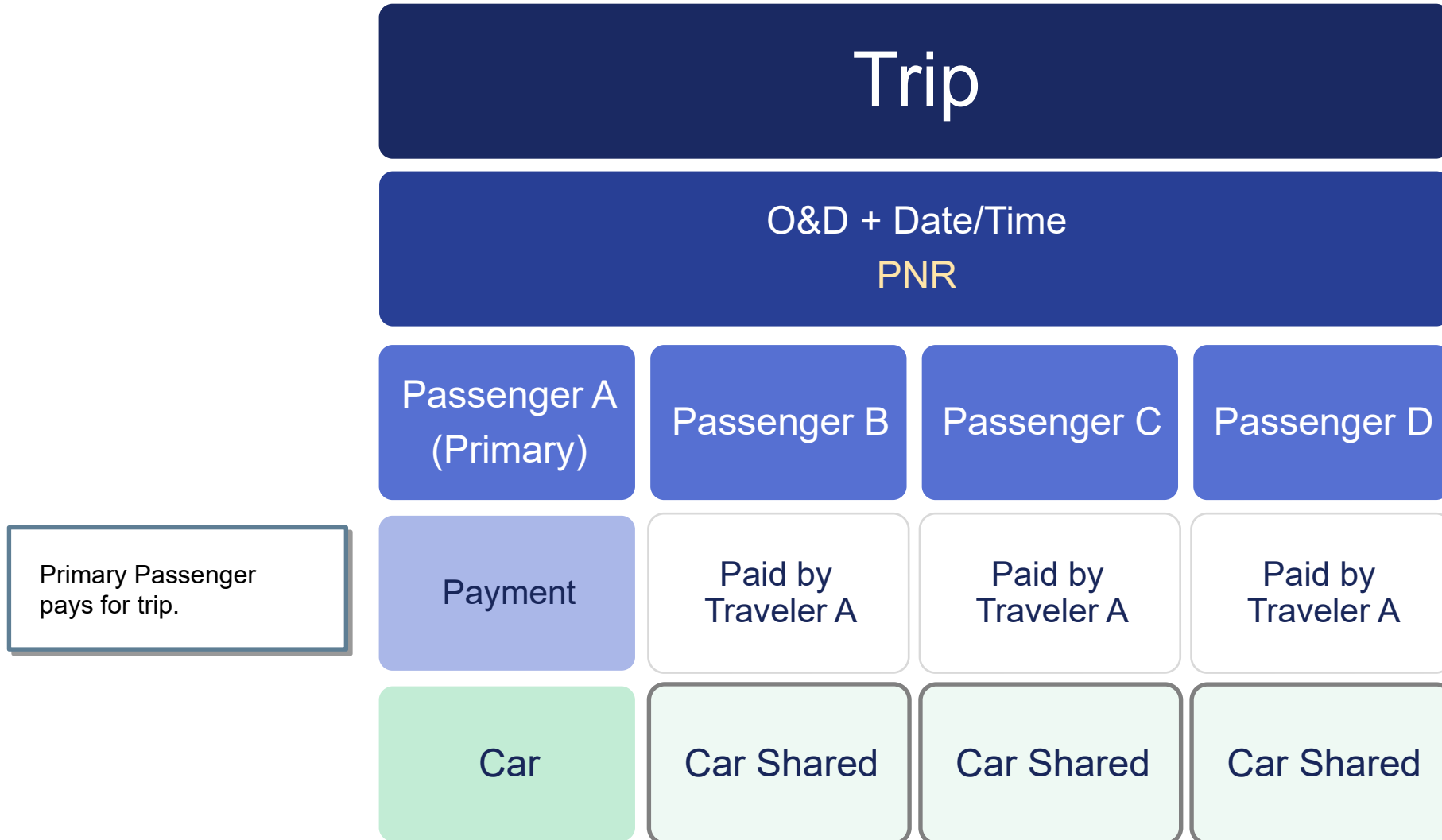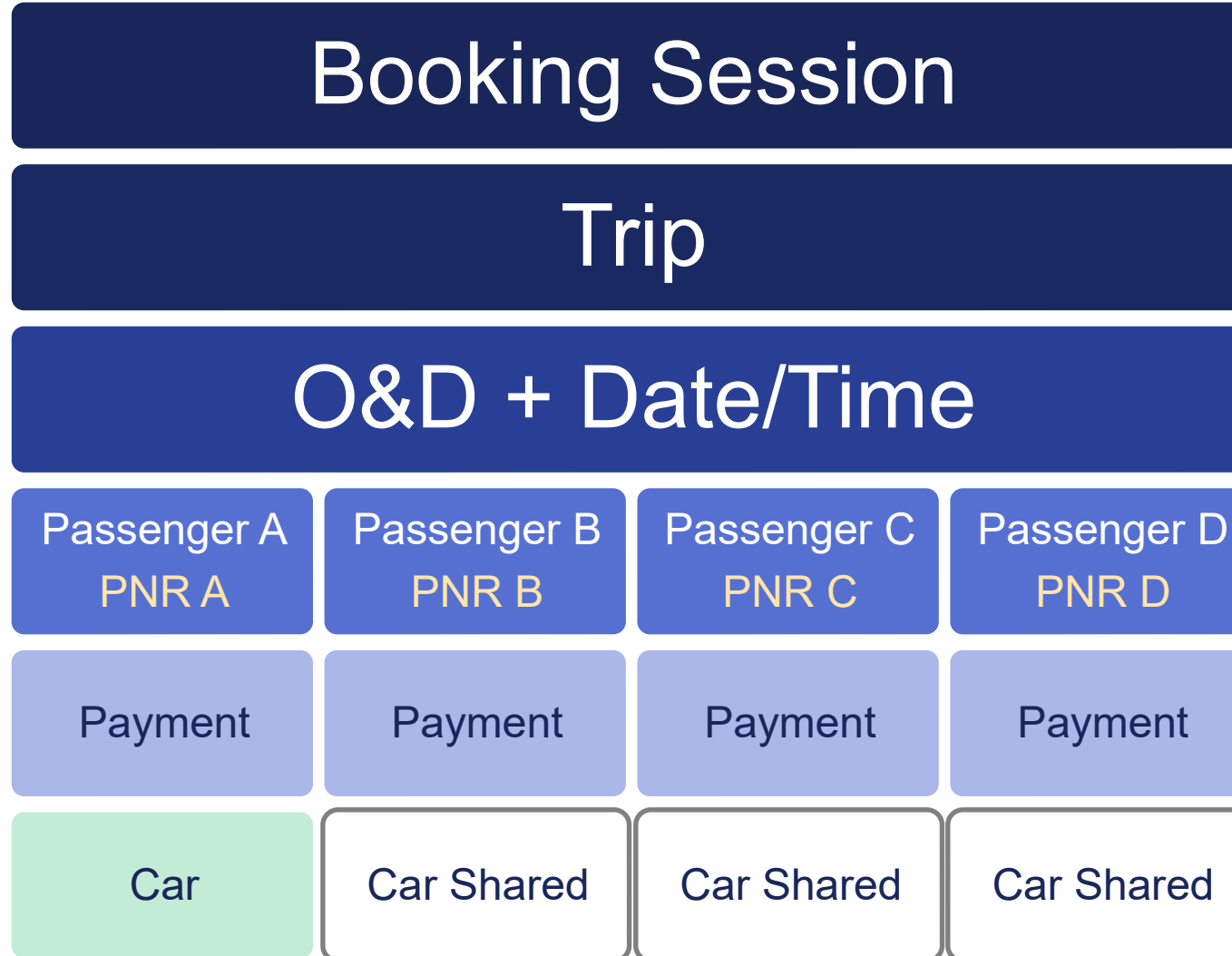
Each passenger pays for own trip.

Exception: Car

Southwest

Multi Pax with Individual PNRs
New Conceptual Model, Multiple Trips

Booking Session	
Trip 1	**Trip 2**
O&D + Date/Time 1	O&D + Date/Time 2

Passenger A PNR A	Passenger B PNR B	Passenger C PNR C	Passenger D PNR D
Payment	Payment	Payment	Payment
Car	Car Shared	Car Shared	Car

When O&D and/or Date/Time are modified for one or more Passengers, SWABIZ splits those passengers' travel into a separate trip.

When a change splits the changed flights into a new Trip, SWABIZ provides the option to book another car.

Southwest

Potential Benefits

Advantages to multiple pax booking with individual PNRs

More closely aligns to SME booking/funding practices. Each Passenger pays for and expenses his/her own travel.

Each Passenger receives his/her own confirmation and itinerary via email. This is an important privacy concern.

Travel Arranger can change origin/departure, date/time for one or more passengers online through SWABIZ without calling a SWABIZ representative on the phone to split it into a new PNR. This reduces SWABIZ's call volume, and the accompanying expense.

Southwest

Potential Challenges
Considerations for multiple pax booking with individual PNRs

The PNR is used by the Travel Arranger and Passengers for functionality that applies to everyone in the travel "party". If these are to be retained, alternate methods must be implemented. Examples:

- Travel Arranger accessing/modifying a trip
- One passenger checking in for all passengers

Assuming that multiple Passengers share use of a car, a car is unique in that it's a shared resource in business travel.

- How does a Travel Arranger determine who "pays" for a car on a multi pax business trip?
- Why do car rental companies require a single form of payment for business travel booked for multiple travelers?
- Has the rise of alternate transportation (Uber/Lyft, hotel shuttles) impacted car bookings in business travel?

Hotel bookings may also be a shared resource.

This proposal is one potential solution to one potential problem in multi-pax booking. Further analysis is due.

Southwest

Enhancement | **Expanded Duty of Care**

Expanded Duty of Care
What are we trying to solve?

Duty of Care is a company's moral and legal responsibility for the well-being of its employees. A company's Travel Risk Management Program ensures that the company meets its obligations for Duty of Care while their employees are on business travel.

Enhancements to SWABIZ would help our customers meet their Duty of Care obligations to their employees as a part of their Travel Risk Management Program.

Potential new features:
- Traveler tracking system
- Traveler contact information
- Alerts to Travel Administrators, Travel Arrangers and Travelers
- Heatmap Representation of Traveler locations and/or incident areas

Southwest

Travel Risk Management Maturity Model (TRM3)

Our Customers have a responsibility to protect their employees from foreseeable harm. Failure to meet their obligations presents many risks, including:

- Fines
- Business interruptions
- Loss of stock value
- Litigation
- Potential bankruptcy

The Travel Risk Maturity Model (TRM3) by the Global Business Travel Association (GBTA) provides assessment and structured guidance for corporate Travel Risk Management programs over time.

Southwest

Travel Risk Management Maturity Model (TRM3™)

Five levels of Travel Risk Management Program maturity

TRM3 Measuring Program Maturity

This model provides assessment and structured guidance for corporate Travel Risk Management programs over time. KPAs are assessed across five levels of maturity:

Optimized (5) — Program integrated throughout organization.

Managed (4) — Metrics collected and reviewed. Cross-organization support.

Proactive (3) — Consistent execution of travel risk management processes.

Defined (2) — Basic travel risk management policies defined and documented. Primary focus on incident response.

Reactive (1) — Ad hoc. Few policies. Chaotic in the event of an emergency.

Southwest

Duty of care – Airline CBTs

As a baseline, airlines offer opt-in alerts and provide travel waivers; some airlines partner with Concur to offer additional duty of care solutions for mutual[1] customers

Airline CBT	Provided services	During emergencies
DELTA	• Opt-in flight notifications • Complimentary rebooking or travel waiver issued during irregular operations	• Adhere to typical policy[2]
American Airlines	• Opt-in flight notifications • Travel waivers	• Partnership with Concur[3]
UNITED	• Opt-in flight notifications • Travel waivers	• Partnership with Concur
jetBlue	• Opt-in flight notifications	• Adhere to typical policy
Alaska	• Opt-in flight notifications • Weather waivers	• Adhere to typical policy
HAWAIIAN AIRLINES	• Opt-in flight notifications • Travel waivers	• Adhere to typical policy
AIR CANADA	• Opt-in flight notifications • Traveler report aggregation	• Partnership with Concur

1. Mutual customers are the airtline's corporate customers who also subscribe to Concur.
2. Typical policy is defined as, no specific difference between corporate and leisure travelers
3. Mutual customers can take advantage of Concur's duty of care solution (ex. fwd-ing itineraries to TripIt), even if they book outside preferred channels (dot com or 3rd party)
Sources: Corporate websites, Concur

Southwest

Concur's duty of care solution

A comprehensive risk management platform that integrates several technology capabilities to keep travelers safe and simplify travel managers' jobs

	Before trip	During travel	Crisis management
Travel	• Send itinerary to TripIt • Update contact information and opt-in to notifications	• View latest itineraries • Request trip changes	• **Request assistance during emergencies**
Mana	• Aggregate traveler itineraries (flights, hotels, cars, etc.) • **Group multiple travelers**	• Update traveler itineraries • Monitor for potential disruptions • **Real-time location tracking**	• Mass notifications[1] to travelers • Dispatch proper emergency services

Example technological capabilities
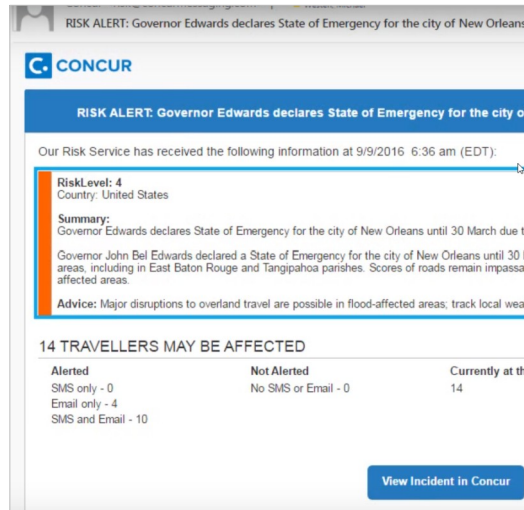
Grouping travelers helps to simplify itinerary management, particularly if a risk pops up
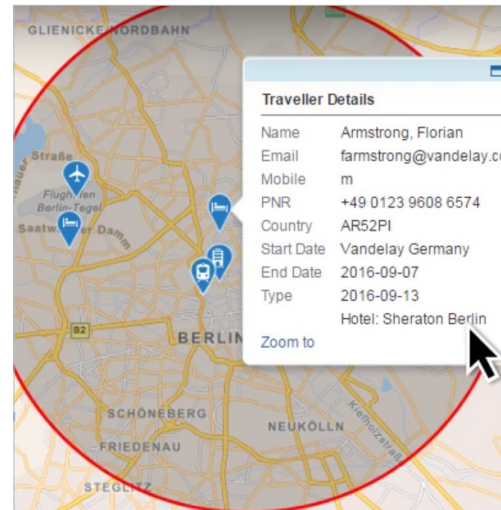
Confirm location of travelers (via scheduled itineraries) during crises
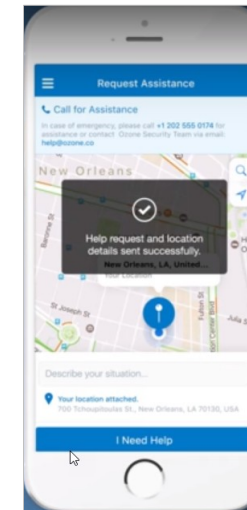
Send location during emergencies

1. Mass notifications are the ability to broadcast alerts and messages to all affected travelers. During crises, travel managers have the option to override default notification settings.
Sources: Concur website, TripIt

Southwest

Potential Benefits
Advantages to enhanced TRM features

Increase in SWABIZ adoption, bookings due to:

- Higher awareness of corporate responsibilities of managing traveler safety and upholding Duty of Care.
- SWABIZ becoming an option for SMEs with mature Travel Risk Management Programs.
- Encouraging SMEs to implement a Travel Risk Management Program, leveraging SWABIZ as one of its tools.

Empowering our Customers to minimize the risks associated with failure to meet their duty of care obligations.

Southwest

Potential Challenges
Considerations for enhanced TRM features

In internal and external discussions, Southwest should refer to these features as "Travel Risk Management" or "TRM" features, instead of "Duty of Care" features.

Subject matter expertise on Travel Risk Management is critical.

Our Customers' legal obligations are changing (generally expanding), and vary by locale.

For displaying a Passenger's location/status/etc., a tabular display is optimal. Maps and heatmaps as a primary display don't meet accessibility requirements.

Determine information that would be shared if an event occurs aboard a Southwest flight (locked manifest).

More upfront and ongoing support effort is required from Southwest for:
- Deeper integration into existing TRM processes and systems
- Customers with more mature TRM programs, per TRM3.

SWABIZ is a single-airline CBT. Consider the Customer overhead involved in splitting TRM tasks between SWABIZ and other booking tool(s).

Southwest

Enhanced TRM features

Three potential options

Lightweight Solution	• Minimum TRM support features • Traveler Tracking widget (tabular) • Enhanced reporting? • No integration into particular TRM processes
Full-Featured Solution	• Integrate into existing TRM systems • Make raw data available to aggregator such as Concur • Similar to other airlines' solutions; would allow rich TRM support as a "one-stop shop" for Travel Administrators/Travel Arrangers for multiple airlines' bookings
Hybrid Solution	• Offer both Lightweight and Full-Featured Solutions • Lightweight can provide quick information "at a glance" for non-emergency contact • Lightweight serves SMEs with less mature TRM processes; Full-Featured serves those with more mature processes • Scales as SME moves up the TRM Maturity Model.

Southwest

Enhancement | **Enforce and Track Travel Policy Compliance**

Enforce and Track Travel Policy Compliance
What problem are we trying to solve?

Allow Travel Administrator to manage company travel policies and track travel policy compliance.

Potential features:

- Traveler policy compliance reporting
- Enforce and track compliance on rules such as:
  - Selection of specific fare class(es)
  - Total fare must be below a set limit
  - Selection of flights with lowest fare
  - Selection of ancillaries (e.g. EarlyBird, WiFi)
  - Selection of specific car/hotel providers
  - Car/hotel daily cost must be below a set limit
    - Hotel: Restrict prepaid/nonrefundable?

Southwest

Enforce and Track Travel Policy Compliance

Components of policy in SWABIZ

1. Travelers
- To whom will the policy apply?

2. User Behavior
- What are we measuring?

3. Limit
- What constitutes a violation?

4. System Response
- What happens when policy is violated?

5. Reporting
- What is our history of compliance? Trends?

Southwest
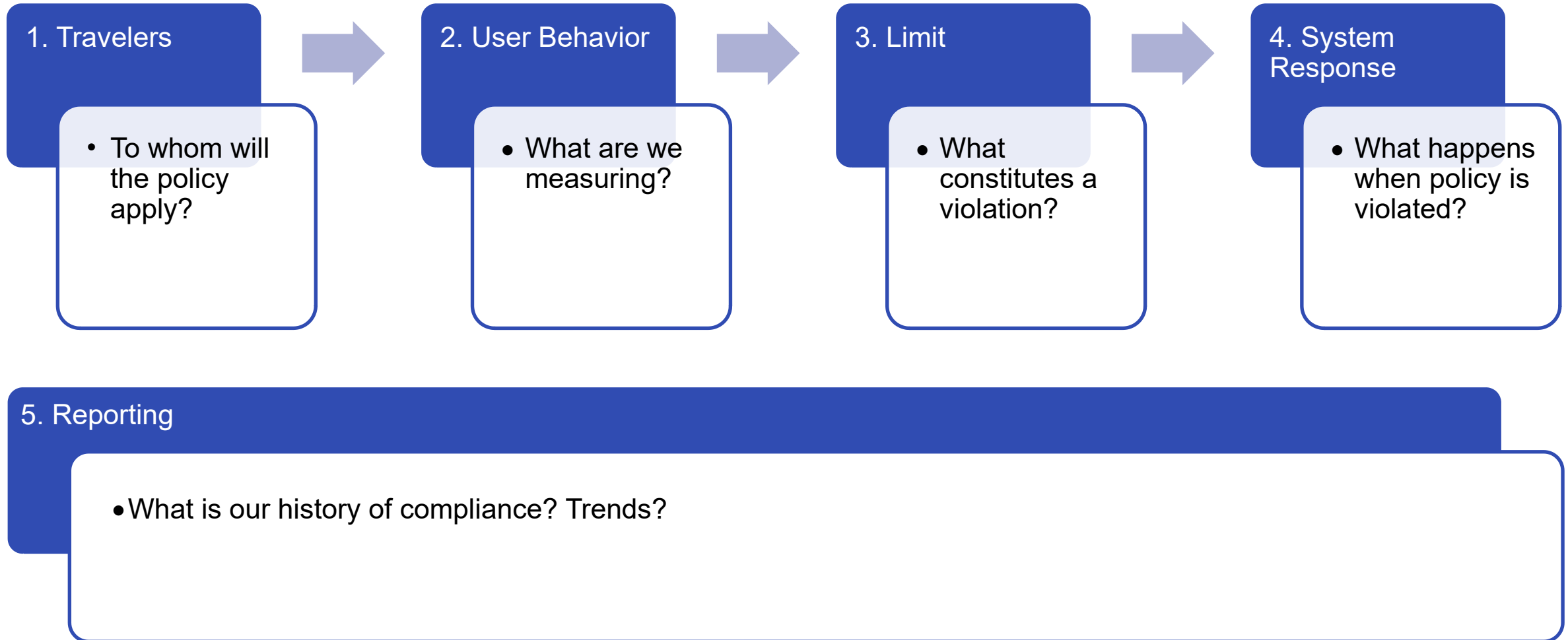
Enforce and Track Travel Policy Compliance

To whom does the policy apply?

Estimated complexity of solution
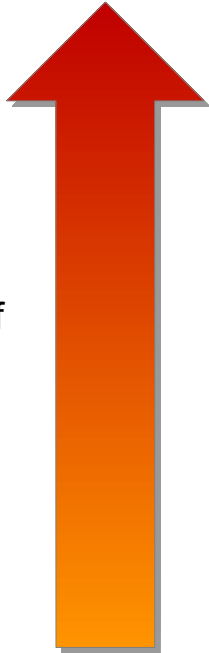
Travelers	SWABIZ Implication
Travelers meeting combinations of the below criteria.	Boolean logic, builder UI.
Travelers in a specific group.	Group creation and management (LDAP?)
Travelers with specific roles.	Role creation and management (LDAP?)
Users above/below a salary grade.	Add salary grade to of user profile (LDAP?)
All of the Company save for specific users (exceptions).	User selection
Specific users within the Company.	User selection
Everyone in the Company.	

Southwest

Enforce and Track Travel Policy Compliance
What happens in response to a violation?

Estimated complexity of solution
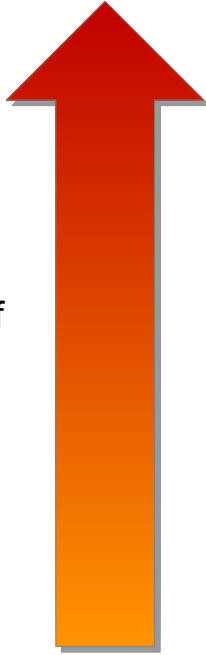
System Response	SWABIZ Implication
Send alert and initiate approval flow, including non-CTMs such as management (escalation).	Alerting and approval system with cross-user workflow.
Send alert to Travel Arranger, require approval before proceeding.	Alerting and approval system.
Send alert to Travel Arranger	Alerting system.
Warn Traveler of non-compliance, flag for reporting	Keep a record of non-compliance.
Prohibit action	Ability to lock out features.
Allow action	Ability to lock out features.

If it is possible for the booking Travel Arranger/Passenger to "unlock" the prohibited option, display the option and disable it.

If it is **not** possible for the booking Travel Arranger/Passenger to "unlock" the prohibited option, hide the prohibited option.

Southwest

SAP Concur Free Expense Policy Template Builder
A quick study

https://www.concur.com/en-us/expense-policy-builder

This tool does:

- Offer a very simple experience, configuration of a few fixed parameters.
- Construct a barebones Corporate Expense Policy document.
- Allow users to further customize that document.

It does not:

- Specify actions for Corporate Expense Policy violations.
- Build policies/rules for use by the CBT.

Corporate Expense Policy ≠ CBT Travel Policy

- Corporate Expense Policy lives outside the CBT; any configuration tool in the CBT UI would allow the Travel Administrator to configure rules that reflect this Policy.

All screeenshots can be found in Appendix 4: SAP Concur "Free Policy Template Builder" Wizard Screens

Southwest

SAP Concur Free Expense Policy Template Builder

High-level view

Potential Benefits

Advantages to enforcing and tracking travel policy compliance

Increase in SWABIZ adoption, bookings due to:

- Allowing Travel Administrator to set criteria for fare cost and other metrics.
- Providing reports for tracking travel compliance.

Southwest

Potential Challenges
Considerations for enforcing and tracking travel policy compliance

Subject matter expertise on Travel and Expense (T&E) is necessary.

Corporate T&E policy exists outside of SWABIZ. Corporate T&E is a mature, multidisciplinary field that touches many departments in a company.

Need to determine level of integration into existing T&E processes and systems.

SWABIZ is a single-airline CBT. Consider the Customer's overhead involved in splitting its travel policies and T&E tasks between SWABIZ and other booking tool(s).

Southwest

Enforce and Track Travel Policy Compliance

Three potential options

Lightweight Solution	• Minimum Travel Policy definition and enforcement • Limits on fares, total spend, booking class • Single-tier (Travel Arranger or Administrator) approval • Reporting on approvals and warnings • No integration into T&E tools
Full-Featured Solution	• Integrate into existing T&E systems and processes • Make raw data available to aggregator such as Concur • Similar to other airlines' solutions; would allow rich T&E support as a "one-stop shop" for Travel Administrators/Travel Arrangers for multiple airlines' bookings
Hybrid Solution	• Offer both Lightweight and Full-Featured Solutions • Lightweight serves SMEs with simple T&E processes; Full-Featured serves those with more sophisticated systems and processes • Scales with an increase in SME's T&E needs

Southwest

Generalizations

Generalizations: Omni-Channel UX
What are we learning?

Omni-channel UX will provide a consistent, fluid experience across Southwest booking channels.

- The experience won't be the same for every channel. It will be a cohesive overall experience, where data is shared from channel to channel where appropriate.
- Research is necessary to determine what features add value to the customer for a given platform.
- User profiles and goals, context of use, platform characteristics, and Leisure Vs. Corporate Travel positioning must be considered.
- Design of all features for all platforms must follow this strategy.

SWA has the resources and expertise to build and implement a world-class Omni-Channel UX Strategy.

Southwest

Generalizations: Multi-Pax Booking
What are we learning?

The SWABIZ third-party booking flow is implemented as a "proxy booking" overlay over Southwest.com leisure-style booking.

This decision was driven by a technical limitation, not a business requirement. Booking by proxy must be abandoned for true multi-passenger booking. Abandoning proxy booking allows us to consider the right way to do it.

The current "proxy booking" flow for third-party passenger booking may be relatively sound.
- Switching from "booking as" to "booklng for" allows us to address privacy issues inherent to proxy.
- We must still examine the flow and remove artefacts of proxy booking, including terminology.

In the Southwest.com payment model, one Passenger is responsible for payment for all of the passengers' travel. This may not be valid for business travel - we must examine this assumption.

Each passenger paying his or her own way on a business trip requires some considerations, including:
- Issuing multiple PNRs; one PNR per passenger.
- Rolling a PNR up to a "trip" in order for a Travel Arranger to access multiple PNRs at once, and for a Passenger to check in multiple PNRs at once
- Determining which Passenger will pay for a shared car.
- Splitting off modified PNRs to form a new "trip" (which would eliminate costly calls to SWABIZ)

Southwest

Generalizations: TRM and Travel Policy Enforcement
What are we learning?

Leveraging subject matter expertise on **Travel Risk Management** and **Travel and Expense** is vital..

Need to scope features clearly and manage users' expectations carefully. **What these features do** and **what they don't do**.

Must assess target SMEs' TRM and T&E processes and systems in order to scope potential solutions.

Southwest may want to consider relying upon partner(s), given:
- Complexity of both domains (technical, logistical, regulatory, liability, etc.)
- Availability of existing tools and use by other airlines
- SWABIZ is a single-airline portal
- Cost to develop in-house, given that SWABIZ is offered at no charge

Potential solutions include:
- A minimal solution within SWABIZ for smaller/less mature SMEs (and for TRM, traveler status at a glance).
- A full-featured solution that could involve using an aggregator like Concur.
- A hybrid including both solutions, for smaller/less mature SMEs and larger/more mature SMEs.

Remember to invest where it matters!

Southwest

Summary

Omni-Channel UX

- We can and should do this.
- SWA has the expertise and resources to deliver a world-class experience.

Multi-Pax booking enhancements

- Opportunity for enhancements.
- Further research is necessary to question our assumptions.

Enhanced Duty of Care features

- Corporate TRM is a rich domain: Complex, dynamic civil/legal implications for SMEs.
- SMEs that fly with other airlines use OAs tools.
- What are SMEs' needs, current TRM practices/tools?
- Consider partnership with tool(s) such as Concur.
- **Invest where it matters.**

Enforce and track traveler policy compliance

- How does this fit into T&E practices?
- T&E policy resides outside CTM tools.
- SMEs that fly with other airlines use OAs tools.
- Consider partnership with tool(s) such as Concur.
- **Invest where it matters.**

Southwest®

Next Steps

- Socialize with Marketing and Corporate Sales

- Inform R4+:
  - Further research
  - Scoping and roadmap
  - Design and validation

- Proceed with evaluation of other features

Southwest®

Appendix 1A. | Omni-Channel UX Strategy:
Potential User Tasks by Channel

Omni-Channel UX: Tasks, Travel Administrator

Examples

Technology	SWABIZ	Southwest.com
Desktop Web	• Create and modify Traveler bookings; incl. ancillaries, car, and hotel • Manage Traveler, Travel Arranger, Ghost Card, IRN • View and redeem Corporate RR Points • Generate Reports • Manage travel policy and enforcement	Login to Southwest.com desktop site with Travel Admin credentials redirects to SWABIZ.com desktop site hot state.
Mobile Web	• Create and modify Traveler bookings; incl. ancillaries, car, and hotel	Login to Southwest.com mobile site with Travel Admin credentials redirects to SWABIZ.com mobile site.
Mobile App	• Create and modify Traveler bookings; incl. ancillaries, car, and hotel	?

Messaging	• As configured:
	  • Receive TRM alerts, including Flight In Trouble (FIT).
	  • Violations of fare/class policy?
		?

Southwest®

Omni-Channel UX: Tasks, Travel Arranger
Examples

Technology	SWABIZ	Southwest.com
Desktop Web	• Create and modify Traveler bookings; incl. ancillaries, car, and hotel • Potential TRM and Travel Policy tasks	Login to Southwest.com desktop site with Travel Arranger credentials redirects to SWABIZ.com desktop site.
Mobile Web	• Create and modify Traveler bookings; incl. ancillaries, car, and hotel	Login to Southwest.com mobile site with Travel Arranger credentials redirects to SWABIZ.com mobile site.
Mobile App	• Create and modify Traveler bookings; incl. ancillaries, car, and hotel	?
Messaging	• Duty of Care: Flight In Trouble (FIT) alerts.	?

Southwest®

Omni-Channel UX: Tasks, Business Traveler

Examples

Technology	SWABIZ	Southwest.com

Desktop Web	• Per policy, create and modify own bookings; incl. ancillaries, car, and hotel
	• Check in for SWABIZ-booked flights.
		• Upon login, ask traveler if she wants to book/manage personal or business travel:
		  • Personal: Continue on Southwest.com
		  • Business: Redirect to SWABIZ.COM hot landing page or flow.

Mobile Web	• Per policy, create and modify own bookings; incl. ancillaries, car, and hotel
	• Check in for SWABIZ-booked flights.
		• Upon login, ask traveler if she wants to book/manage personal or business travel:
		  • Personal: Continue on Southwest.com Mobile.
		  • Business: Redirect to SWABIZ.COM Mobile hot landing page or flow

Mobile App	• Per policy, create and modify own bookings; incl. ancillaries, car, and hotel • Check in for SWABIZ-booked flights.	?
Messaging	• Receive Duty of Care alerts, including Flight In Trouble (FIT) alerts. • Other native notifications from mobile app.	?

Southwest

Appendix 1B. | Omni-Channel UX Strategy:
Technology Context of Use

Omni-Channel UX: Technology Context of Use
Examples

Technology	Location	Requirements	Usage Notes
Desktop Web	Desktop: Office, home Laptop: Office, home, remote	Web access	Remote laptop use has overhead: connectivity, power, space (seated/standing), time.
Mobile Web	Anywhere	Mobile data	More difficult to access than a mobile app.
Mobile App	Anywhere	Mobile data	Overhead: app installation
Email	Anywhere	Mobile data or Web access	Reactive: A user may initiate an action from/upon receipt of a notification.
Push Notifications	Anywhere	Mobile data	Reactive: A user may initiate an action from/upon receipt of a notification.
Mobile App Notifications	Anywhere	Mobile data	Reactive: A user may initiate an action from/upon receipt of a notification.
Desktop Notifications	Desktop: Office, home Laptop: Office, home, remote	Desktop: Web access Laptop: Mobile data or Web access	Reactive: A user may initiate an action from/upon receipt of a notification.

Southwest

Appendix 1C. | Omni-Channel UX Strategy:
Technology Capabilities

Omni-Channel UX: Technology Capabilities
Examples

Technology	Display	Input	UI Rules	Other Resources	Awareness, w/permission
Desktop Web	Desktop or laptop	Keyboard, mouse/touchpad	Desktop browser	Desktop web, desktop, mobile web, mobile	Location (limited)
Mobile Web	Mobile	Touch keyboard or STT, touch	Mobile browser	Mobile web (limited), mobile (limited)	Location
Mobile App	Mobile	Touch keyboard or STT, touch	Mobile OS	Mobile web (limited), mobile (limited)	Location, other sensors, WiFi, Bluetooth, NFC
Email	Desktop or laptop, Mobile	Mouse/ touchpad, touch	Static email format	Desktop: Desktop web, desktop, mobile web, mobile Mobile: Mobile web (limited), mobile (limited)	None
Push Notifications	Mobile	Touch	Mobile OS push notifications	Mobile web (limited), mobile (limited)	None
Mobile App Notifications	Mobile	Touch	Mobile OS	Mobile web (limited), mobile (limited)	None
Desktop Notifications	Desktop	Mouse/ touchpad	Desktop OS	Desktop web, desktop, mobile web, mobile	None

Appendix 2. Multi Pax Booking Improvements:
Potential Multi Pax Booking Flows

Travel Arranger can

more Passengers.

m

Southwest
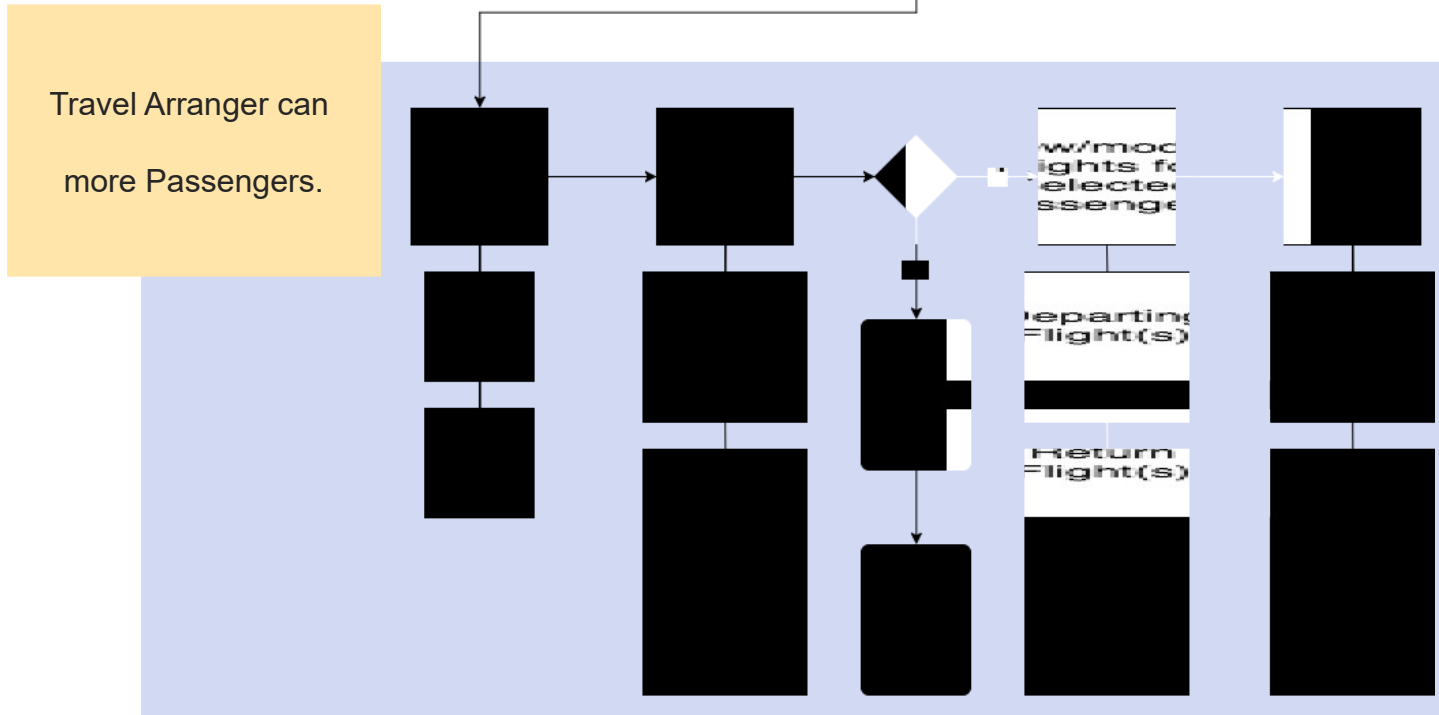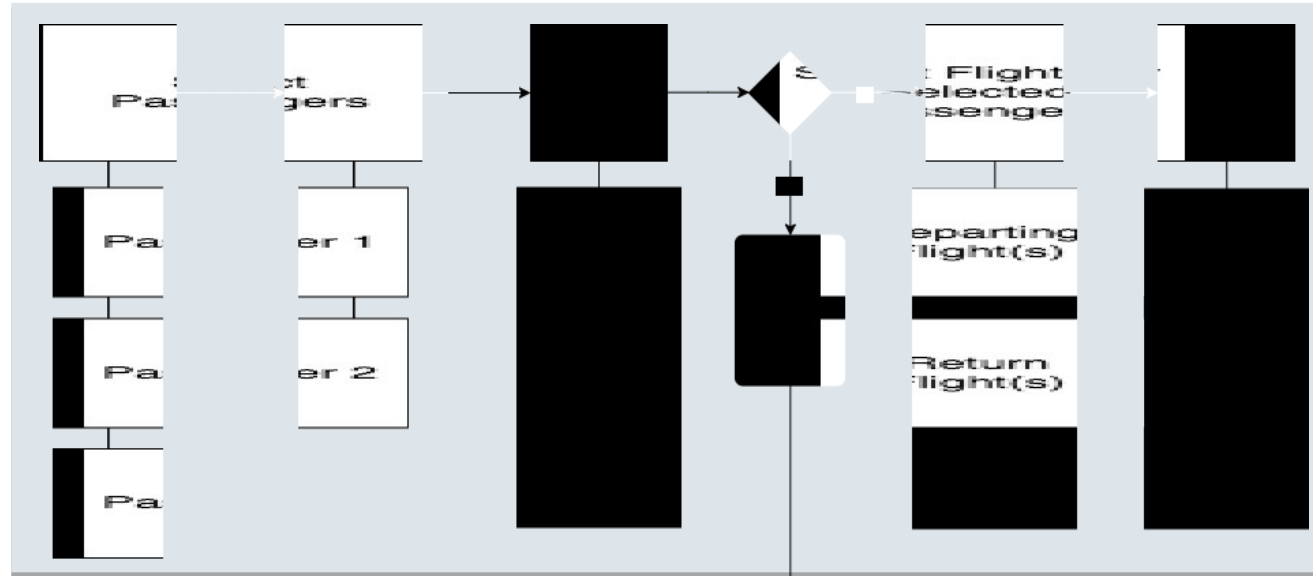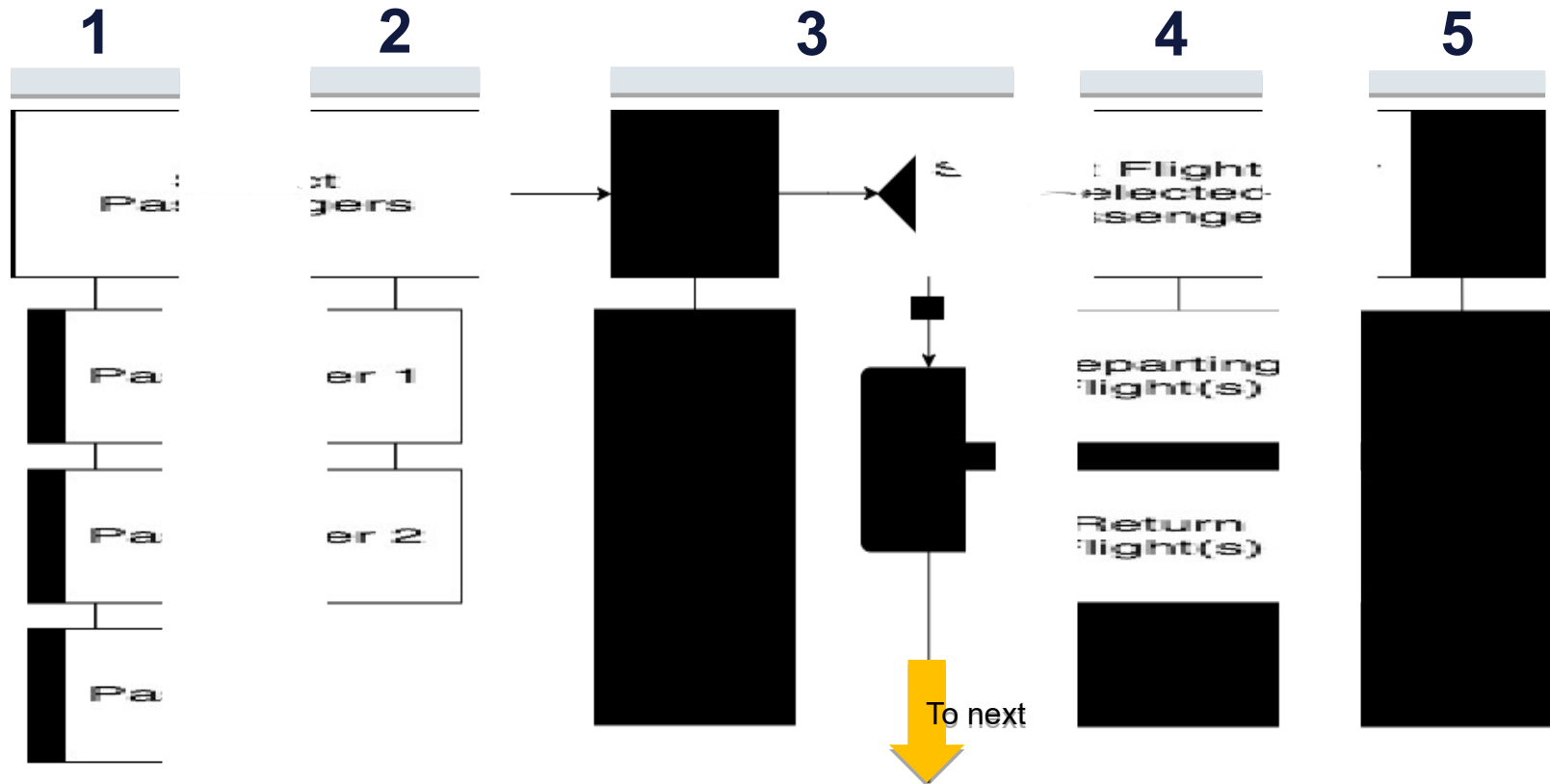
1   Multi-pax selection without "Primary" designation. Supports Travelers and Guests.
2   Unchanged.
3   CTM may change flights for one or more passengers. These will be split into new Trip(s).
4   Each Passenger is associated with that Traveler's stored payment info.
5   Total displayed for each passenger's travel. Each passenger issued a unique PNR and confirmation email.
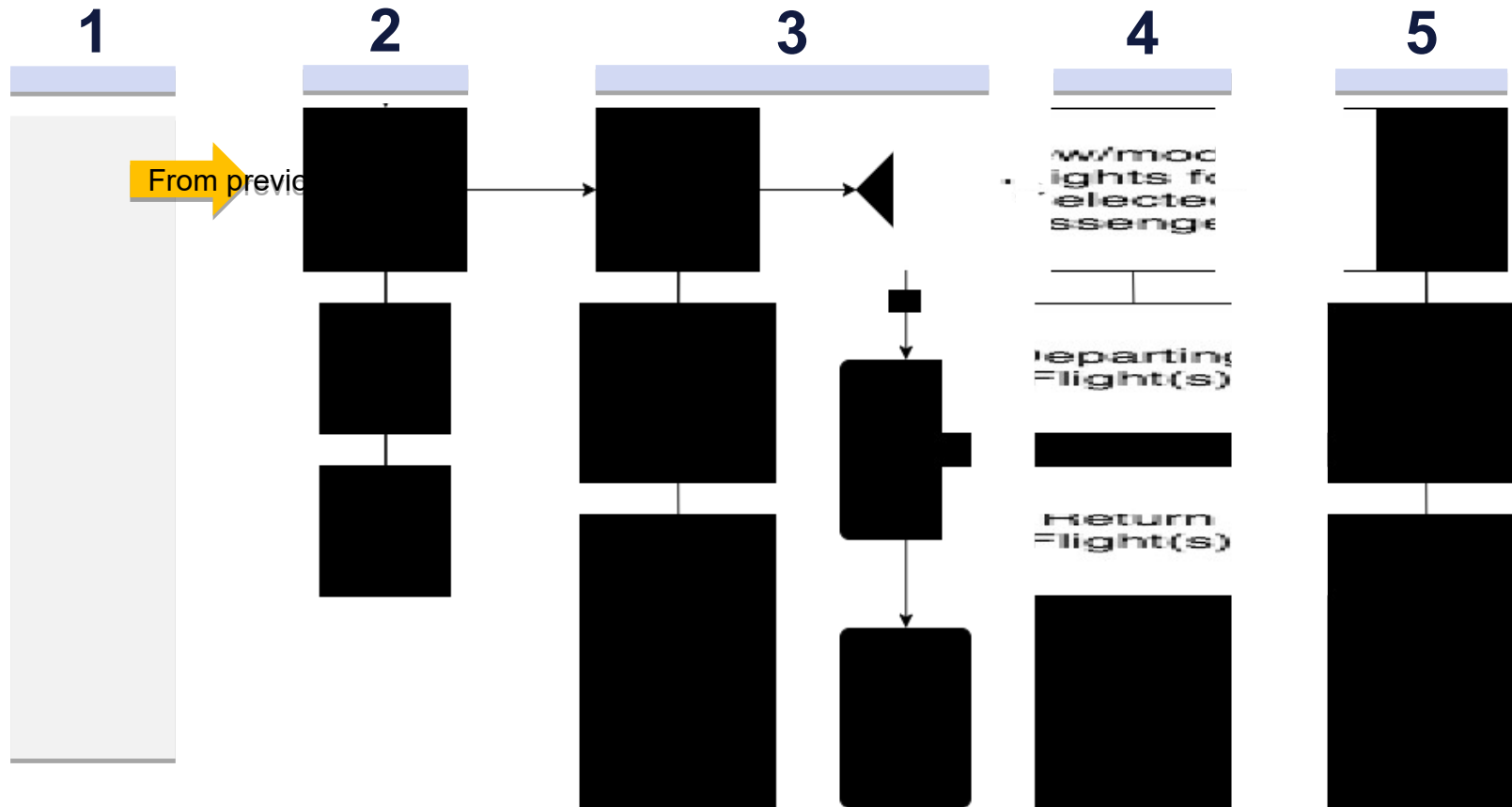
1   Passengers were selected from Trip and Price Details.
2   Current flights pre-selected (not current Modify flow).
3-5 If new flights were selected, they were split into Trip B.

Appendix 3. Expanded Duty of Care:
**SAP Concur "Free Policy Template Builder"
Wizard Screens**

Concur Free Expense Policy Template Builder: 1

Concur Free Expense Policy Template Builder: 2

Concur Free Expense Policy Template Builder: 3

Concur Free Expense Policy Template Builder: 4

Concur Free Expense Policy Template Builder: 5

Concur Free Expense Policy Template Builder: 6