



Travel Guide: Pre-Travel Checklist

- Identify first day of travel/training; ensure this is cleared with the traveler, their manager, and your manager
 - Add applicable travel start and end dates to Outlook calendars
- Send welcome email to your incoming traveler
- Send out email to your team announcing incoming traveler, their name, what team they are coming from etc.
- Where are you going to be training the traveler?
 - Reserve conference rooms, if necessary
 - If virtual – does the traveler have the required software installed and available?
- Compile any supplies that may be needed to train your traveler
 - Flip charts and markers
 - Notebooks, pens, etc.
 - Access to relevant group drives, computer programs, building or areas, etc.
- Schedule time to have your traveler meet with your manager, to go over your team’s overall function within the department
- Prepare a tentative training schedule, in accordance with your team’s travel itinerary. Ensure this schedule includes a plan or agenda for their first day with your team.
 - Ensure you are abiding by all requirements on their Boarding Pass
 - How long can they travel until?
 - How many hours per week can they spend with your team?
- Send any useful materials or manuals for the traveler to read over prior to their arrival
- Use an Assessment Chart to evaluate traveler skill level at the beginning, middle and end of the travel experience
 - A Sample Assessment Chart is available in the Appendix
- Check in with your manager to confirm all pre-travel preparations