

CHECKLIST FOR CAO TRAVEL PREFERENCES

In the Executive Assistant Toolkit “Travel Management for the CAO” section there is a list of questions to ask your boss about their travel preferences to ensure he/she has a successful trip.

It’s also important to remember that preferences change with time and circumstance. Your boss might prefer different things for different trips, and it’s good to keeping a running list in an easy-to-edit-file. Some of these preferences may be the same for each trip, however others might be more specific. Maintaining this list of priorities will eliminate repetitive conversations and save everyone time.

Below is a template to keep track of your boss’ travel preferences. Keep this checklist handy.

	TRAVEL INFORMATION
Passport Number	
Record of COVID Vaccinations	
Airport Preference	
Airplane Seat Preference (window/aisle, front/back, extra leg room)	
Time Preference of Flights (morning, afternoon or evening)	
In-flight Meal Preferences	
Allergies	
Airport Lounge Access #	
Airline Points Card #	
Type of ground transportation (train, taxi, uber, rental car)	
Rental Car Company and Loyalty Points Card #	
Hotel Preference and Loyalty Card #	
Hotel amenities (wi-fi, working space, gym, room services, etc.)	
Hotel Proximity to restaurants	
Airport Hotel / In Town for one night stay?	
International Roaming Package (activation and carrier)	
Copy of itinerary sent to spouse or family member?	
Other Information	