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The New Operating Model for Business Travel

How Modern Connectivity Powers
Scalable, Automated, Traveler-Centric Operations

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Introduction

Business travel is experiencing a structural shift unlike anything in recent memory. Rising traveler expectations, increased operational complexity, and heightened financial scrutiny are creating new pressures across the ecosystem. At the same time, corporate travel programs and TMCs are being asked to deliver a more intuitive experience with fewer resources, while hotels confront unprecedented cost pressures and the growing importance of loyalty, merchandising accuracy, and channel profitability.

These converging forces framed the two industry roundtables DerbySoft hosted in London and Denver. In both sessions, leaders from hotel brands, TMCs, fintech innovators, distribution partners, and corporate program owners offered candid, unfiltered perspectives. Despite their varied roles, the message was remarkably consistent: modernizing business travel is now impossible without modernizing the underlying connectivity and data flows that support it.

The industry has attempted to build incremental improvements on top of legacy structures, but those foundations can no longer carry the expectations placed on them. This paper re-frames the operating model required for business travel to scale, automate, and meet the modern traveler where they are today. It is grounded in the insight shared at both roundtables and shaped by the industry's collective desire for greater accuracy, consistency, and collaboration.

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# Key Shifts Reshaping Business Travel

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Traveler Expectations Have Reset — and They Are Non-negotiable

Across both roundtables, one theme surfaced repeatedly:

> Today's business traveler expects the same clarity, transparency, and personalization they experience in leisure bookings. They want accurate content, clear inclusions, real-time pricing, and confidence that the rate they are selecting is the right one — no surprises at check-in, no friction around loyalty recognition, and no ambiguity on what's included.

Participants noted that many travelers now begin their hotel shopping on consumer channels because they offer richer content and clearer merchandising. Even when those travelers ultimately book through corporate policy, the inconsistency between systems fuels doubt. This behavior not only creates leakage; it undermines trust in the program itself.
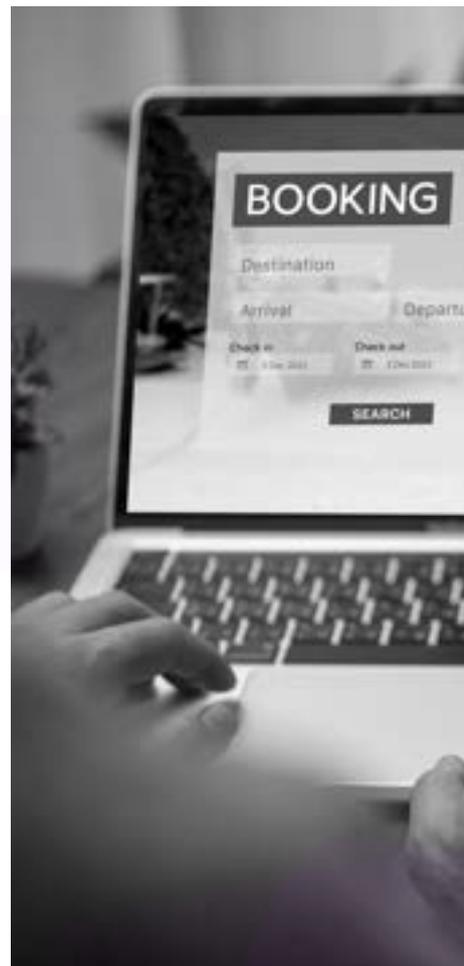
The new operating model must start with the traveler experience. Without consistent, accurate content flowing across channels, even the best-intentioned program will struggle to achieve satisfaction, compliance, or cost control.

Corporate Travel Programs are Under Pressure to Deliver More with Less

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Corporate buyers face a different but equally complex challenge. They are responsible for compliance, cost containment, traveler satisfaction, and duty-of-care visibility, but often without the staffing or tools that reflect the complexity of today's environment.

In both London and Denver, buyers described the impossibility of meeting rising expectations without more reliable data. Rate accuracy, cancellation policies, inclusions, and loyalty eligibility all vary depending on the source of content. When these discrepancies surface during a trip, the travel manager becomes the owner of the escalation — even though the root cause lies upstream in fragmented content and systems.

There was consensus that corporate programs are willing to embrace modern approaches — dynamic sourcing, personalized offers, AI-driven optimization — but only if the underlying data is trustworthy, consistent, and in real time.

TMC Operational Complexity Has Become Unsustainable

The TMC perspective was equally clear:

> The shift to multi-sourcing has increased traveler choice, but it has also dramatically increased operational burden. Agents and servicing teams are navigating inconsistent rate rules, mismatched content, unpredictable payment flows, and bookings that follow different servicing paths depending on the source.

The strongest sentiment from both roundtables was that TMCs cannot continue absorbing this operational friction. Exceptions, rework, and manual reconciliation consume disproportionate resources and create additional service-level risk. Many TMC leaders emphasized that they are eager to modernize but modernization must reduce complexity, not add to it.

This is where structured, normalized, real-time connectivity becomes the backbone of a different future. When content and payment flows are standardized, TMCs regain control, reduce operational noise, and unlock the capacity to innovate.

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Hotel Partners Need Accuracy, Consistency, and Better Commercial Alignment

Hotel participants voiced a parallel frustration:

> Inconsistent representation across channels is eroding their ability to control brand integrity, manage profitability, and grow share in priority segments. Rate parity issues — whether caused by content lag, mapping inconsistencies, or misinterpreted rules — create tension with owners and confusion for travelers.

Equally pressing is the financial dimension. Hotel owners are more focused than ever on cost of sale. They scrutinize distribution costs, payment fees, and the true contribution of negotiated business. When costs are opaque or inconsistent, confidence erodes and program participation becomes harder to justify.

Roundtable participants also emphasized that hotels increasingly view business travel as a critical arena for growing loyalty. They want better visibility into traveler profiles, more consistent loyalty recognition, and the ability to participate in more collaborative commercial programs with TMCs, but legacy systems make this nearly impossible.

Modern connectivity enables a future where hotels can protect their brand, merchandise effectively, and collaborate more deeply with their TMC partners on loyalty, market share, and personalized offers.

Payment Friction and Reconciliation Gaps Remain One of the Most Exhausting Operational Challenges

If content is the most visible pain point, payments are the most exhausting one.

Across both sessions, participants described VCC recognition as unpredictable, inconsistent, and far too dependent on property-level staff who turn over frequently and have limited training. Hotels acknowledged this burden as well — noting that outdated PMS workflows, multi-step authorization rules, and fear of chargebacks all contribute to front-desk hesitation.

This inconsistency has material consequences:

(!) Travelers experience embarrassment and delays.	(!) TMCs absorb the escalation and rework.
(!) Hotels face added labor pressure and financial risk.	(!) Corporates lose visibility into their true cost of stay.
(!) Reconciliation cycles dramatically slow down	

Participants were clear: Until payments and reconciliation are streamlined, business travel cannot scale efficiently.

Modern connectivity — paired with automated, structured payment workflows — is the path forward.

The Missing Layer:
A Shared Source of Truth

Perhaps the most important insight from both roundtables was this:
No two stakeholders today share the same version of the booking record.

Hotels, TMCs, OBTs, and payment providers all hold pieces of the truth,
but not the whole. This fragmentation creates a cascading effect:

Reporting Discrepancies		Missed Revenue	
Attribution Uncertainty		Manual Reconciliation	
Commission Disputes		Traveler Servicing Failures	

A shared, structured, real-time source of truth is the
connective tissue the industry does not currently
have but urgently needs.

This is the cornerstone of the new operating model.

The CTM Example:

A Glimpse into What Modern Connectivity Enables

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One of the most compelling illustrations of the future came through the discussion of CTM's continued evolution of its Sleep Space initiative. By moving toward structured, real-time chain connectivity, CTM has begun to deliver:

More Accurate Rate and Availability Displays

Lower Exception Rates

Fewer Surprises During Servicing

Clearer Alignment Between Hotel Systems

Richer Data for Corporate Reporting and Optimization

This is not a theoretical model — it is a practical demonstration of how modern connectivity reduces operational burden and elevates traveler experience.

Connectivity as the New Operating Layer

Taken together, the themes that emerged across London and Denver reveal an undeniable truth:

Connectivity is no longer a technical enabler.

Connectivity is the invisible infrastructure that allows every stakeholder to move faster, collaborate deeper, and deliver a more intuitive experience.

Modern Connectivity Delivers:

✓ **Real-Time Accuracy**

A consistent view of rates, rules, and availability across systems.

✓ **Operational Efficiency**

Fewer exceptions, fewer escalations, and fewer manual interventions.

✓ **Stronger Corporate Outcomes**

Greater compliance, higher traveler satisfaction, and more predictable cost performance

✓ **Better Hotel Performance**

More accurate merchandising, improved visibility, and better attribution — strengthening participation and loyalty investment.

✓ **A Foundation for Automation and AI**

AI can only operate effectively when the underlying data is structured, timely, and consistent.

Preparing for an AI-enabled Future

AI will reshape business travel, but only if the ecosystems that support it are modernized. Participants in both roundtables highlighted the emerging potential for these capabilities:

- ✅ Intelligent Re-shopping
- ✅ Personalized Recommendations
- ✅ Automated Exception Resolution
- ✅ Dynamic, Context-aware Pricing
- ✅ Last-Minute Targeted Offers
- ✅ Forecasting Across Distribution, Servicing, and Occupancy

But all of these capabilities depend on structured, real-time connectivity, and a unified booking record. AI cannot transform what the underlying infrastructure cannot support.

DerbySoft's Role in Enabling the Industry's Next Chapter

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A clear through-line emerged in both roundtables:

> The industry needs a partner that can bridge fragmentation, stabilize data flows, and enable new forms of collaboration.

DerbySoft Is Uniquely Positioned to Play this Role

✓ **Connectivity and Content Normalization**

DerbySoft delivers structured, consistent, real-time content — eliminating gaps and reducing the operational friction that TMCs and hotels described in both sessions.

✓ **Payments and Reconciliation Enablement**

By standardizing payment flows, simplifying VCC handling, and supporting automation at the PMS level, DerbySoft helps reduce one of the most painful operational burdens across the ecosystem.

✓ **Data Integrity and Shared Visibility**

DerbySoft's infrastructure supports unified, reliable booking data — the foundation for attribution, reconciliation, collaboration, and AI-driven optimization.

These capabilities empower the ecosystem to move from fragmented and reactive to coordinated and proactive.

✓ **Commercial and Strategic Enablement**

DerbySoft enables new forms of hotel–TMC collaboration: loyalty initiatives, targeted promotions, shared traveler insights, and dynamic commercial models.

Closing Thoughts

The business travel industry is at a pivotal moment. Stakeholders across the ecosystem — hotels, TMCs, corporates, fintech partners, and technology providers — all voiced a shared desire for greater accuracy, consistency, and collaboration. But desire alone is not enough. The operating model that supports business travel must evolve.

Modern connectivity is the foundation of that evolution. It delivers the accuracy travelers expect, the efficiency TMCs need, the visibility hotels require, and the structure AI demands. It enables personalized traveler experiences, strengthens commercial partnerships, and creates the conditions for sustained industry innovation.

DerbySoft is poised to support this next chapter — as a connectivity leader, a strategic enabler, and a partner committed to helping the ecosystem move forward with confidence, clarity, and shared purpose.

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