The ABCs of EMDs
IdeaWorks explores how airlines manage a la carte transactions with travel agents

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About Jay Sorensen, Writer of the Report

Jay Sorensen’s research and reports have made him a leading authority on frequent flier program development and the ancillary revenue movement. For 2011 he was a speaker at the World Low Cost Airlines Congress in London and the IATA Passenger Services Symposium in Singapore. His published works are relied upon by airline executives throughout the world. The 2010 Guide to Ancillary Revenue was the third edition of this popular report; it is regarded as a global resource on the topic of a la carte pricing. IdeaWorks also published its first Guide to Loyalty Marketing in 2010.

Mr. Sorensen is a veteran management professional with 27 years experience in product, partnership, and marketing development. As president of the IdeaWorks consulting firm, he has enhanced the generation of airline revenue, started loyalty programs and co-branded credit cards, developed products in the service sector, and helped start airlines and other travel companies. His career includes 13 years at Midwest Airlines where he was responsible for marketing, sales, customer service, product development, operations, planning, financial analysis and budgeting. His favorite activities are hiking, exploring and camping in US national parks with his family.

About Eric Lucas, Editor of the Report

Eric Lucas is an international travel, natural history and business writer and editor whose work appears in MSN/Bing Travel, Michelin travel guides, Alaska Airlines Magazine, Westways Magazine and numerous other publications. Founding editor of Midwest Airlines Magazine, he is the author of six books, including the 2009 Michelin British Columbia Green Guide. Eric has followed and written about the travel industry for more than 20 years. He lives in Seattle, Washington, where he grows and sells organic garlic; visit him online at www.TrailNot4Sissies.com.
Add more to the trip
Add Ancillary Services

Key elements to consider when establishing an EMD strategy

1. Define your objectives
   What is your primary objective for implementing EMD? This will help you to prioritize activities and gauge success
   
   **Increase revenues**
   ✓ Capture the revenue generated by optional services and other fees systematically with an automated process
   ✓ Allow full reporting by increasing visibility in airline revenue accounting and revenue management systems
   ✓ Allow visibility of payment status at the airport enabling control of waivers
   ✓ Allow interline to airline partners by replacing in-house or/and non-industry standard eMCO by EMD which is compatible with the different systems
   ✓ Generate customer loyalty through improved service: no more waiting in airport to collect paper compensation vouchers, more flexibility and speed

   **Reduce costs**
   ✓ Support the move to 100% electronic document for travel which enables high level of automation and self-service, avoiding the need for manual processing
   ✓ Generate economies of scale by enabling a common sales process across all channels including online (kiosk, web, mobile) and travel agency distribution
   ✓ Support fraud protection (coupon usage) by providing a means for audit and control of collection and payment of ancillary services
   ✓ Simplify system integration by adopting global industry standard for issuance, fulfillment and collection of ancillary services which can replace airline proprietary solutions and all miscellaneous documents
   ✓ Decommission of expensive ATB printers and use of generic printers

2. Decide your deployment approach
   ✓ Which service at what time? Selecting the high value and easy to implement services first? Limited set of services, for instance: top services baggage, seats then all the rest versus all?
   ✓ Which channel at what time?
   ✓ Which market?
   ✓ Consider using both EMD and MCO simultaneously for a phased approach (by channel, market or service). If you have an existing eMCO product, will a data migration be required?

3. Consider the impact on your systems
   ✓ Consider and analyze the impacts and/or adaptations needed to handle EMD in:
   ✓ Front office systems:
     › e-ticket server: an upgrade of your e-ticket server may be required
     › Sales interfaces (website, ACO/CTO and call centers, GDS) to be able to display, create and update an EMD as well as to generate payment and passenger receipts
     › Departure control system: in order to view and “consume” an EMD
   ✓ Back office systems:
     › Revenue accounting system in order to process all fields and types of EMDs
     › Data warehouse

4. Be prepared to adjust/change your business processes
   ✓ Sales (direct channels, travel agencies, interfiling): by increasing the number of sales channels and customer touch-points, you need tracking, automation and control across all channels
   ✓ Operations (airport processes, i.e. check-in, self-service/kiosks)
   ✓ Revenue accounting
   ✓ Training: amount required and training approach

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Amadeus can help. Amadeus is the first certified GDS and the industry leader in providing IT solutions for EMD to airlines.

amadeus.com/airlines
The ABCs of EMDs
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Similar to paying the check in a roadside diner, a la carte pricing began in the airline industry as a cash-only business. Electronic distribution through travel agencies, discounts for online pre-payment, and payment by credit card were methods not anticipated or introduced by low cost airline pioneers. The need for sophistication, to include the development of a method to track a la carte transactions through Global Distribution Systems (GDS) and airline Computer Reservation Systems (CRS) only occurred after traditional airlines embraced the ancillary revenue revolution. That’s the role filled by EMDs (Electronic Miscellaneous Documents) which provide proof-of-purchase for a la carte services bought through travel agencies and corporate travel departments, and for direct sales by airlines through websites and ticketing locations.

A la carte services were once a simple business

The ancestry of a la carte is best traced to Freddie Laker and his Skytrain service. The year was 1977 when Mr. Laker inaugurated flights between London and New York City with a no-frills plan. Consumers could only book flights direct with the airline. To prove this point, cash registers were used to ring up sales at the airport. Passengers only dined if they ordered before boarding and paid in cash.¹

The model created by Skytrain was largely adopted by People Express in 1981 amid a newly deregulated environment in America. People Express further defined no-frills flying by charging $3 to check bags, 50 cents for a cup of coffee, and introduced the novelty of selling tickets onboard.² Advertising (at right) even pictured coins next to a cup of coffee to confirm the carrier’s frugal approach. Flight attendants took in thousands of dollars from the sale of tickets, coffee, and snacks; it was a messy manual process.

¹ “Freddie Laker; A Vanguard Of No-Frills, Low-Fare Flying” The Washington Post, 11 February 2006.
Low cost carriers (LCCs) remained a fixture in the US during the 1980s even after the failure of Skytrain and People Express. The survivors cut costs by discontinuing meal services, squeezing more seats onto aircraft, and minimizing unproductive ground time for aircraft fleets. Retail activity was viewed as complicating the cost structure; the primary emphasis was placed on operational simplicity. However, the future of aviation would forever change when continuing losses compelled Ireland-based Ryanair to abandon the full service model and adopt a no-frills approach in 1991.³ Gone were Ryanair’s business class, free drinks, and meals – a la carte was about to arrive in earnest.

**Ancillary revenue is born and embraced by network airlines**

If Freddie Laker can be credited with a la carte pricing, then Michael O’Leary, CEO of Ryanair, is certainly the originator of ancillary revenue. The airline was among the first to charge its customers for checked baggage in 2006.⁴ That same year O’Leary predicted “more than half of our passengers will fly free” by the end of that decade.⁵ He believed a surge of ancillary revenue would someday replace the need to charge a fare. That objective remains elusive; today’s best results equal about 30 percent of ticket revenue. But traditional airlines, suffering severe economic duress, began to notice.

Network airlines in the US eagerly picked through the a la carte buffet for easy opportunities. During 2004 Northwest Airlines introduced a $5 fee for bookings made through call centers.⁶ Two years later during 2006 the carrier also started charging $15 for Coach Choice seats such as those in the exit row and in better aisle locations.⁷ The fees were eventually matched by US-based competitors. Delta Air Lines chose a retail-oriented path in 2007 by building a la carte features into its website.⁸ Consumers could select hotel accommodations, car rentals, Crown Room Club passes, airport parking, shuttle services, and city tours, during the booking process at Delta.com.

Then came 2008. It was a terrible year to be an airline - - but was an amazing year for ancillary revenue. The price of oil almost reached $150 a barrel and the world’s airlines prepared for an economic catastrophe. US-based airlines turned to a la carte fees as a quick and certain method to generate cash. Before the year ended, free checked baggage had virtually disappeared from the US domestic market. A la carte services, such as exit row seats and lounge passes, were only offered at carrier websites. Business booked by travel agencies and corporate travel departments remained an elusive opportunity for the sale of a la carte options. The ancillary revenue revolution had not reached the channels linked to Global Distribution Systems. But trends clearly pointed in the direction of la carte pricing quickly becoming an integral part of the travel industry.

³ “History of Ryanair” at Ryanair.com reviewed November 2011.
⁴ “Ryanair o charge £2.50 for checking in bags” article in the Guardian dated 25 January 2006.
⁵ “A radical fix for airlines: Make flying free” article in CNN Money dated 31 March 2006.
⁶ “Airline’s ticket fees may nudge customers to Web sites” article in the Seattle Times dated 25 August 2004.
⁷ “Northwest adds $15 fee for premium coach seats” article in the Houston Chronicle dated 16 March 2006.
Ancillary revenue will soon tap a far larger travel market

LCCs have a natural advantage; these airlines focus effort on direct sales to consumers at their own websites. Airlines such as Ryanair, Allegiant, and Air Asia are only limited by their creativity and don’t fret how to integrate a la carte sales into the world of travel agency distribution. Much to the envy of traditional airlines, LCCs are free to implement practically any a la carte feature and often don’t sell tickets through a GDS. For example, Europe-based Wizzair offers an amazing array of ten options in its online booking process: 1) extra leg room, 2) priority boarding, 3) flexible flight change, 4) airport transfer, 5) SMS mobile phone confirmation, 6) delay warranty, 7) airport check-in, 8) prepaid checked baggage, 9) prepaid sport equipment baggage, and 10) trip insurance.

The a la carte options offered by traditional airlines are much more limited. And the distribution world for these carriers is a far more complicated affair. Delta did boldly move to integrate a la carte options within the booking path of Delta.com. However, there is a far larger market out there with online travel agents (OTAs) such as Expedia and more than 163,000 travel agencies worldwide. The largest share of air travel is still booked by travel agents. Airline transactions processed by travel agents using a GDS deliver more than 60 percent of airline tickets sold worldwide.

The world’s airlines are projected to generate $32.5 billion worldwide from ancillary revenue activity during 2011. It’s a big number which will only grow much larger as a global network of travel agencies becomes a network of ancillary revenue retailers. This is just beginning to occur with the integration of EMD processes by global distribution systems. Just imagine, more than 60 percent of the market is only now gaining the ability to book a la carte features through automation. It’s certainly possible today’s $32.5 billion projection could jump to $100 billion in the future as travel agencies and online travel agents become integral components of ancillary revenue distribution.

EMDs function like ancillary revenue e-tickets

It’s a credit to the airline industry that travelers now accept e-tickets as a routine part of the travel experience. The airline industry only recently discontinued paper tickets back in 2008. Perhaps travelers might be a tad anxious if they understood the complexity behind the purchase of a ticket from a travel agent in New York for a departure on Lufthansa that is eventually rebooked on United for a return flight from Frankfurt. Then there’s the accounting aspect of accepting payments in dollars and remitting funds in local currencies to each airline participating in the itinerary.

It’s all accomplished using bits and bytes with a myriad of computer systems working together behind the scenes. The EMD type A is “associated” or linked to an individual passenger e-ticket (such as checked baggage), which allows the airline to quickly tally a la carte revenue after the flight is completed. The EMD type S is designed as a “stand-alone” purchase voucher for services purchased by a consumer but not linked to a particular passenger itinerary, such as the purchase of a gift card.

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10 Speech of Rob Fyfe, CEO of Air New Zealand, IATA World Passenger Symposium, 12 October 2011.
12 “Fact Sheet: Electronic Ticketing (ET)” reviewed at IATA.org November 2011.
The International Air Transport Association (IATA), a worldwide organization that “represents, leads and serves the airline industry,” coordinated the adoption of a standard among its 230 member airlines that carriers should be capable of using EMDs before the end of 2012, and that EMDs should be the only method to settle payments between airlines and travel agencies by the end of 2013.13 Three airlines (Finnair, Iberia, and Japan Airlines) have already used EMDs for travel agency transactions and 25 airlines have developed the capability to use their first EMD.

EMDs allow travel agencies to process payment for various airline services such as a la carte options and deposits for group travel. The EMD also permits the printing of a paper-based document for the convenience of travelers. But most importantly, it converts the relic of paper-based transactions into an electronic format that allows airlines to track a la carte activity from the moment an item is sold through the time of delivery to a consumer.

This process is facilitated by standardized codes that describe a compilation of 300+ individual services and fees. The list of Optional Services is administered by the Airline Tariff Publishing Company (ATPCO) and is available for review at its website (atpco.net). Currently, more than 269 airlines file baggage fee data and 27 airlines file data for a la carte fees such as meals, lounge access, and unaccompanied minor services.14 Fees filed with ATPCO are grouped by categories (defined by an IATA standard) called Reason for Issuance Codes (RFIC) which are summarized by the following (examples follow each title):

A) Air transportation related (bonus miles and seat assignment).
B) Surface transportation / non-air services (bus transfers and sightseeing).
C) Baggage (pet in baggage hold, one kilogram of baggage, and surfboards).
D) Financial impact (trip insurance and carbon offset).
E) Airport services (airport lounge, priority boarding, and unaccompanied minor).
F) Merchandise (logo apparel and gift cards).
G) In-flight services (at seat power, Wifi, headsets, video games, and onboard café).

A la carte services focus on baggage, airport services, and in-flight services. Individual items are specifically described by Sub Codes and can be extremely detailed.15 For example Sub Code “0E4” applies for one piece of checked baggage up to 10 kilograms (22 pounds) and having a maximum linear dimension of 158 centimeters (62 inches). The baggage category requires more than 270 Sub Codes due to the vast number of possible combinations of weight, size, and type. The ATPCO data is distributed to Global Distribution Systems, applied to EMDs, and ultimately permits charges to be automatically applied for the a la carte items purchased by consumers.

**EMDs involve travel agencies, vendors, and of course . . . airlines**

Existing paper-based systems and temporary electronic substitutes have labored to keep up with the ancillary revenue revolution. This has created inefficiency and added expense at a time when airlines are desperate for every dollar or euro of profit. But the largest obstacle has been on the revenue side; EMDs will finally bring travel agencies into the fold as automated retailers of a la carte services.

14 “Optional Services Industry Fact Sheet” at atpco.net reviewed November 2011.
15 “ATPCO Industry Sub Code Guidelines” document at atpco.net reviewed November 2011.
As displayed in the flow chart, the process begins with a consumer - - who could be a corporate traveler - - booking a seat at a travel agency.

1. **Consumer visits travel agency to make airline reservation.**
2. **Travel agency books seat and a la carte services through Global Distribution System.**
3. **Global Distribution System creates e-ticket for air travel and EMD for each a la carte service purchased by the consumer.**
4. **EMD is transmitted to the EMD Server operated by the airline.**
5. **EMD Server matches the a la carte purchase with the passenger reservation for retrieval at airport.**
6. **Departure Control System provides manifest to identify passengers who have purchased a la carte items.**
7. **A la carte services are delivered to passengers.**
8. **Airline files description and pricing for a la carte services with the Airline Tariff Publishing Company (ATPCO).**
9. **ATPCO provides Sub Codes and prices to Global Distribution System.**
10. **ATPCO provides Sub Codes and prices to Global Distribution System.**
11. **Airline revenue accounting processes the EMD and collects revenue through the BSP.**

* The equivalent service in the United States, Puerto Rico, the U.S. Virgin Islands, and American Samoa is provided by the Airline Reporting Corporation (ARC).

**EMD is marked as used and revenue is posted by airline.**
The core of the system is the EMD Server which processes EMDs on behalf of the host airline. The EMD Server becomes an integral component of a carrier’s Computer Reservation System (CRS). The CRS, which is also called a host system, operates as the internal reservation network for an airline. In addition, the GDS used by the travel agent must also have the capability to interface with EMD Servers. The following is offered as a brief definition to explain the two key systems associated with booking air travel:

<table>
<thead>
<tr>
<th>System</th>
<th>Definition</th>
<th>Key Vendor Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GDS – Global Distribution System</strong></td>
<td>Worldwide computerized reservation network used as a single point of access for reserving airline seats and other travel related services by travel agents, online reservation sites, and large corporations.</td>
<td>Amadeus, Sabre, and Travelport (Galileo and Worldspan).*</td>
</tr>
<tr>
<td><strong>CRS – Computer Reservation System</strong></td>
<td>Computer software system selected by an airline to manage transactions and store information involving flight schedules, seat inventory allocation, and pricing. These are also called Passenger Services Systems.</td>
<td>Amadeus, HP Enterprise Services, Navitaire, Sabre, Travelport, and TravelSky.**</td>
</tr>
</tbody>
</table>

* Key or major GDS defined by PhoCusWright press release dated 13 January 2010.
** Key CRS listed are those associated with the world’s ten largest airlines based upon 2010 passenger traffic.

There are many Computer Reservation System vendors throughout the world. Six provide CRS services to the world’s ten largest airlines: Amadeus, HP Enterprise Services (HP), Navitaire, Sabre, Travelport, and TravelSky. Of these, four also operate Global Distribution Systems for travel agencies and support the IATA EMD initiative: Amadeus, Sabre, Travelport, and TravelSky. The below table, with data courtesy of IATA, lists the status of services provided by these key vendors to airlines and travel agencies.

<table>
<thead>
<tr>
<th>Select CRS and GDS Vendors</th>
<th>EMD Servers for Airlines (CRS)</th>
<th>A la Carte Sales via . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Processing of EMD–S</td>
<td>Processing of EMD–A</td>
</tr>
<tr>
<td>Amadeus</td>
<td>Available</td>
<td>Available</td>
</tr>
<tr>
<td>HP</td>
<td>4th quarter 2011</td>
<td>1st quarter 2012</td>
</tr>
<tr>
<td>Travelport +</td>
<td>Available</td>
<td>During 2012</td>
</tr>
<tr>
<td>TravelSky</td>
<td>Available</td>
<td>4th quarter 2011</td>
</tr>
</tbody>
</table>

Source: IATA e-services Project Team, October 2011 (subject to update)
+ Travelport GDS brands are Galileo and Worldspan.

HP Enterprise Services does not operate its own GDS, and Navitaire is not included in the table because it is not a participant in the EMD initiative. Additional information, to include the full table of vendors, is available online at the IATA website: iata.org/e-service.
EMD will create a far greater retail presence for a la carte options. According to an IATA survey, 96 percent of airlines engaged in the EMD system will use the feature in all distribution channels, to include travel agency transactions. A slightly smaller number (87 percent) will use EMD to process interline activities, which is defined as two or more airlines dividing the amount paid by a consumer in a single booking. The flow chart on a prior page also includes a path for financial settlement between airlines and travel agencies through institutions called Billing and Settlement Plans (BSP). These operate as the central point through which funds flow between travel agencies and airlines.

IATA operates the largest BSP network covering more than 160 countries with $191 billion processed annually. Within the United States, these services are provided by the Airline Reporting Corporation (ARC). EMDs will play a vital role by allowing travel agency and airline accounting systems to process ancillary revenue in a manner similar to e-tickets. The below table, with data courtesy of IATA, lists the status of GDS implementation within the BSPs supported by IATA:

<table>
<thead>
<tr>
<th>Major GDS</th>
<th>EMD Certification in IATA Operated BSP</th>
<th>Processing of EMD–S in IATA BSP</th>
<th>Processing of EMD–A in IATA BSP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amadeus</td>
<td>Available</td>
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<td>Available</td>
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<td>Sabre</td>
<td>Available</td>
<td>During 2012</td>
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</tr>
<tr>
<td>Travelport</td>
<td>4th quarter 2011</td>
<td>4th quarter 2011</td>
<td>4th quarter 2011</td>
</tr>
</tbody>
</table>

Source: IATA e-services Project Team, October 2011 (subject to update)
+ Travelport GDS brands are Galileo and Worldspan.

If this seems complex, you are not alone in this assessment. Creating consistency for the distribution of a la carte services through every possible channel is a daunting task for IATA, airlines, and vendors throughout the world. The introduction of EMD into the travel marketplace is only now in its earliest stages.

**Travel agencies and corporate travel planners gain new access**

The ancillary revenue revolution can’t be complete without the participation of all parties. Consumers already book a la carte services at the websites of traditional airlines and LCCs. But worldwide, this represents the smaller share of airline traffic. The larger share of air travel is booked by travel agents and OTAs for their leisure and business clients.

A la carte pricing has been a source of frustration for travel agents and corporate travel planners. The inclusion of a la carte options into the GDS channel allows these travel retailers to actually sell the goods. Corporations can send travelers on the road with a better idea of the total cost of travel to the company.

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16 “EMD Implementation Update” report issued by IATA November 2011.
17 “Billing and Settlement Plan (BSP)” page at IATA.org reviewed November 2011.
Consumers and corporate clients benefit from EMDs

Pity the poor corporate travel manager who negotiates special fares for company employees . . . only to be overwhelmed with unexpected expense report submissions after travel is completed. Employees pull out their corporate charge card to pay for what they consider necessary services, such as checked baggage, onboard food and drink, and Wifi access. The integration of a la carte fees into the agency booking process will allow companies to order these extras up front to better ensure compliance with corporate travel policies. But it's the general consumer who might benefit the most from the development of EMDs.

Benefits for Consumers

- No more pieces of paper to lose. And just as ET made changes to tickets easier, e-services will make changes to these services easier.
- A la carte services can now be offered across multi-leg journeys and those involving multiple airlines.
- Automation allows travelers to use any airport check-in method for itineraries with a la carte services.

Benefits for Airlines

- Lower costs from simplified accounting.
- More ancillary revenue by selling a la carte services through all channels including partners.
- Global standard that delivers a common process across all sales channels.
- Systematic tracking of revenue and fraud reduction.

People are not prone to complain about prices that are fairly and openly presented. But when consumers believe they are the victims of “bait and switch” or less-than-full disclosure, they are rightfully angry.

These consumers buy an airline seat at a travel agency and are often asked to pay additional fees at the airport and onboard the flight. Equipping travel agents with more information and providing retail capabilities will reduce the element of surprise and help create happier customers. Ultimately, the outcome for a perennially profit-poor airline industry will be better ancillary revenue results courtesy of wider acceptance and wider distribution of a la carte initiatives.
The IdeaWorks Company presents...

Boost Your Carrier’s Revenue IQ

Illuminate and innovate with an on-site learning experience that we call BlueSkyU. Enjoy the convenience and savings of private, transformational seminars held at your headquarters with an agenda chosen by you.

Create your own agenda from a library of presentations provided by global airline consultant and analyst Jay Sorensen. You may choose a 1, 2 or 3 day format, and may wish to include time for one-on-one consulting as well. Simply add coffee breaks and lunch to the schedule. It’s a convenient, cost-effective, and customized method to educate airline managers on crucial marketing issues.

You can fill the room with general staff or limit attendance to senior leaders. The presentation style is designed to encourage debate and discussion in a confidential environment.

The following presentations are available in the BlueSkyU curriculum:

**Ancillary Revenue and a la Carte Pricing:**
- Ancillary Revenue in a Time of Crisis (75 minutes)
- Show Me the Money (75 minutes)
- Is Greed Still Good? (75 minutes)
- Ancillary Revenue Boosts the Bottom Line (75 minutes)
- Moving to Merchandising Methods In the Cabin (90 minutes)
- Airline and Hotel Fees: Wicked, Good, Misunderstood? (75 minutes)
- Allegiant Air: How to Be Better Than Ryanair (60 minutes)

**Frequent Flier and Loyalty Marketing:**
- Loyalty by the Billions (60 minutes)
- Solving the Reward Availability Problem (60 minutes)
- Worldwide Guide to Reward Availability (75 minutes)

**General Airline Industry:**
- Guide to the Airline Industry – Extended Seminar (2 hours)

The BlueSkyU experience delivers these benefits:
- Jump start your strategic and practical knowledge of ancillary revenue.
- Determine what’s best – a la carte, bundled alternatives, or a hybrid approach.
- Create a blueprint for success based upon lessons from all over the globe.
- Generate consumer preference and trust by avoiding the “fee trap.”
- Build employee support and prevent media and regulatory backlash.

Create your own on-site learning experience.

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