



# Global Travel & Expense Policy

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## T&E Philosophy

Travel and expense (“T&E”) is an explicit choice for HubSpot. As a team, we recognize the importance of in-person connections and are choosing to invest in travel this year to help facilitate connections amongst existing employees to facilitate connection vs. investing in expanding our hiring or marketing spend. The cost of T&E is not just measured in \$ but also in its impact on climate through carbon emissions, as further detailed in our sustainability report ([Sustainability Report](#)).

We want to ensure we maximize our investments in key areas across the business and continue to scale HubSpot effectively and efficiently. One key way to do so is enabling smarter travel and expense guidelines. As we continue to scale, we’ve heard over and over from HubSpotters that they want more guidelines and rules when it comes to travel and expense. It can be challenging to make appropriate decisions and HubSpotters have made it clear that they’d rather have firm guidelines in place so that they can focus on their day to day work. We’ve also heard of the desire to ensure consistency across all HubSpotters for allowable vs. non-allowable expenses. We believe it creates inequity if one team interprets UGJ differently than another group. While we will still continue to Use Good Judgment (“UGJ”) for T&E, we have developed the following T&E policy that is designed to address the above concerns and provide clear guidelines and examples for HubSpotters to follow.

## **PClub Guidelines: Get Ready for Your Well-Deserved Break!**

As you gear up for your PCLUB trip, we want to ensure you can completely unplug and enjoy your well-earned time away while keeping things running smoothly for our customers, partners, and business. After all, when we all plan ahead, we all win together! 💪

To help you prepare, we’ve put together a checklist below —your ultimate guide to covering all the essentials before you head out. From securing coverage for critical deals to staying on track with May goals, this prep ensures your team is ready to shine while you recharge.

Our **goal**? To make sure everyone enjoys their well-earned PCLUB experience! A little upfront preparation will give you the confidence to truly switch off, knowing your responsibilities are covered. ✨

## Allocated Additional Time Off by Location for PClub 2024

Here's how much additional time off you can request around the event dates (May 2nd - May 6th), in addition to travel to and from Budapest:

- **EMEA:** You can request **1 day off** on either side of the event (in addition to travel to/from Budapest AND subject to manager approval).
- **AMER:** **1-2 days off** on either side (in addition to travel to/from Budapest AND subject to manager approval).
- **JAPAC:** You can request up to **2 days off** on either side of the event (in addition to travel to/from Budapest AND subject to manager approval).

***Please be aware that we will not approve any additional time off beyond those detailed here. This is to ensure that we can balance our business demands with so many high performers being out of the business at the one time.***

### Flexibility Reminder

Your manager may request flexibility with any time off immediately before or after PCLUB. This helps manage team workload, especially if several people are out at the same time, or if your absence could impact critical customer or partner relationships. A little flexibility goes a long way in ensuring we stay on top of our game!

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### PClub Time Off Checklist

#### Key Reminders

1. **Get Approval in Advance:** Always discuss your travel plans with your manager to ensure your absence doesn't disrupt critical work.
  2. **Adhere to Manager Guardrails:** While unforeseen situations happen, it's important to notify your manager as early as possible so coverage can be arranged.
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#### Global Sales: Time Off Checklist

- **Use Your Judgment:** Evaluate how your time off might impact the team and customer relationships, and have an open discussion with your manager.
  - **Plan Coverage:** Ensure clear coverage for urgent tasks (e.g., customer requests) and ongoing responsibilities (e.g., forecasts). Collaborate with your manager for final approval.
  - **Set Expectations:** Share a clear **Out of Office (OOO)** plan with your team.
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## Before Requesting Time Off

1. **Check Team Calendars:** Verify your team's schedule to avoid overlapping requests. Adjust dates if needed.
  2. **Get Manager Approval:** Always secure approval before finalizing your plans.
  3. **Submit Your Request:** Use Workday (or your region's system) to log your time off if required.
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## Before Taking Approved Time Off

1. **Notify Your Team:** Inform your team of your plans and share your OOO coverage details (e.g., create an OOO calendar event).
2. **Set Up OOO Messages:** Update Slack and email with your OOO notifications to ensure seamless communication while you're away.

## Expense Policy

### Expense: Required Documentation

Receipt Guidelines: Expenses must be accompanied by a detailed, itemized receipt or supporting documentation detailing proof of payment. Failure to provide receipts will result in denial of reimbursement, as receipts are required by local tax authorities (i.e. IRS, etc.)

Expense reports are only reimbursed for Full Time HubSpot employees. If you are a contractor please have your expenses added to your invoice which is paid through a Purchase Order.

- US: Receipts required for all expenses >\$25
- Non-US: Receipts required for all expenses
- Receipts must be clear and legible, ensuring that the spend is visible and agrees to what is submitted. If a tip is included, ensure the tip is evidenced on the receipt submitted. This includes any cash tips.
  - Must include: 1) name of merchant/service provider, 2) amount incurred, 3) transaction date
  - Attaching a screenshot of your bank account activity in place of the actual transaction's receipt is not sufficient. In the event of a lost receipt or if your bank account activity/statement is your only supporting documentation, please fill out a missing expense report form and submit with your expense report: Missing Receipt Form. Manager signature (or email approval) is required.

Submitting fraudulent receipts or falsifying your expense report will result in the loss of your reimbursement privileges and/or other disciplinary actions.

#### Common Reimbursable Expense Categories (Travel and non-Travel)

- Airfare for Club only – **should not be booked in Egencia** but booked personally within your provided budget limitations and expensed in Coupa.
- Taxi/Uber/Lyft/rideshare
- Visas related to business travel
- Gratuities/Tips
- Tips should not exceed the following:
  - Meals/Taxis: 20%
- Hotel Internet Fees
  - Free Wifi has been negotiated

#### Common Disallowed Expenses (Travel)

This list is not exhaustive, but meant to serve as an example of items that will not be approved for reimbursement, whether incurred on a business trip or as part of normal daily operations. Please UGJ while traveling or incurring non-travel related expenses on behalf of HubSpot:

- Mini-bar contents
- Room service charges (that are in excess of trip allowances)
- Traffic fines (i.e. parking, speeding, road violations, etc.)
- Dependent care or Pet care
- Any personal elements of business trip (i.e. socks, pillows, toiletries, etc.)
- Spa treatments and health/fitness clubs
- Airline class upgrades
- Airline clubs
- TSA Pre-Check/CLEAR fees
- Extending a business trip for personal travel
- Passports
- Medical and medication costs outside of travel policy coverage
- Any other personal expense that is not related to HubSpot

## Travel Policy

The below policies are only for business related travel. Should you wish to extend a business trip for personal travel, HubSpot will cover your round trip airfare should it not exceed the price of the original trip. All extra days booked for personal reasons are at the expense of the employee.

HubSpot encourages the enrollment of all loyalty programs related to your travel, this ensures that the traveler is eligible for all discounted and free amenities while traveling. Employees also get to keep any travel points earned while on a business trip.

The following provides further details related to our travel specific policies:

## Airfare

- **All flights must be booked and submitted no later than EOD Monday March 3, 2025. All flights must be expensed via Coupa by April 11, 2025. After this deadline, no flight reimbursement will be accepted.** Your specific per person flight budget will be provided in your PC24 invitation and will be based on the average cost of flights in your area at the time of the invite. If you wait to purchase your tickets and the cost increases, you will be responsible for covering the difference. As long as you submit a flight reimbursement for under the allocated budget, you may fly in and out of different cities and/or on different dates. Please keep in mind that booking two one-way tickets could be more expensive when booking international travel, multi-city round-trips are usually more budget friendly.

Please note: If you expense a flight that is over your allocated budget, your claim will be sent back to you for resubmission of the flight budget communicated to you in your PC24 invitation.

- Budgets will be determined based on a roundtrip main cabin ticket that includes a free advanced seat selection. For those airlines that do not include a complimentary seat, the cost of purchasing a seat will be taken into account when determining specific budgets. The budget does not include seat upgrades such as extra legroom, first class, etc.
- The airport destination where Club is hosted MUST be included in your flight itinerary.
- The flight budget is meant to cover the cost of your flight. If you come in under the budget, you may not apply the funds elsewhere.
- First Class, Business Class or Premium Economy or Economy Plus fares are not approved for Club travel despite travel time.
- If you choose to not bring a guest, you may not use your guest's budget to increase your own flight budget.
- If you need to change your flight after it's booked, you will be financially responsible for the costs incurred.
- HubSpot will cover the cost of 1 carry-on or 1 checked bag per person, per flight. This is already included in your flight budget so this amount should ONLY be expensed if your airline tickets total fall under your provided budget.
- HubSpot will not reimburse for airfare travel insurance or early bird check-ins.
- After flights are booked all airfare are required to be uploaded into the HubSpot President's Club Flight Tracking Form for security and airport transfer purposes.

### Parking/Taxi/Uber/Public Transportation

- You may expense up to \$160 USD (or your local currency equivalent) on a taxi roundtrip, or parking at the airport in your home city.

### Rental Cars

- Rental Car will not be covered for President's Club trips

### Accommodations and Lodging

- Accommodations have been pre-booked by HubSpot for President's Club. Please DO NOT book hotel rooms for the event dates.
- No additional lodging can be expensed for President's Club unless pre-approved for a required overnight flight.

### Meals

#### Employee Meals While Traveling

- Meals should not be expensed while traveling for Club. You will be provided a food and beverage stipend to use while on site at the event.

## Responsibility of HubSpotters

### Employees

It is the responsibility of all employees to submit their airfare expenses by the deadlines provided on the President's Club website. All on site expenses should be submitted no later than 30 days from the trip's final departure day.

### Managers

The responsibility for compliance of all Company business travel and expense charges rests with both individuals and managers. It is the responsibility of the submitting and approving parties to be familiar with these President's Club policies and to be satisfied that they have been reported in a manner consistent with this policy. Please keep in mind each employee is provided a specific budget that will be emailed out to each manager. It is your responsibility to ensure what is expensed is within the employees budget. Expense reports shall be approved by the employee's manager. In the manager's absence, the skip level manager should approve. Managers' should review submitted expenses within 5 days of submission.

### Expense Approval Chain

Employee Creates / Submits Report	Manager Reviews / Approves Report	Expense Team Reviews (based on pre-set criteria)	Employee is Reimbursed
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Employees with fully approved expense reports can expect to receive their reimbursements within 1 week of final approval, with the exception of Japan and Colombia, which will be reimbursed through the payroll process due to banking restrictions. For questions related to your expense report, please reach out to #travelandexpense-help on Slack

## Before You Go

**Check the local travel restrictions:** It is your responsibility to follow all state, local, and territorial travel restrictions. It is your responsibility to confirm if a Visa is needed for travel to a Club destination.

**Check your Passport:** traveling internationally is often prohibited if your passport expires within 6 months of your travel dates. Please ensure you check your passport expiration in advance of traveling.

## Other

### Connect4 Travel Guardrails

Connect4 travel guardrails are a collective effort between the Culture team, P2P, and others. Please ensure appropriate adherence to the guardrails provided: [Connect4](#)

### Travel Advances

HubSpot does not provide travel advances (i.e. cash in advance of a trip) for its employees.

## Still have Questions?

Please reach out to:

Slack channel: #travelandexpense-help

[P2P Wiki Page](#)

With these steps, you'll be fully prepared to enjoy your PCLUB experience, knowing your team and customers are supported. Now go ahead, recharge, and return ready to make 2024 your best year yet! 😎

Enjoy your well deserved break! 🎉