



# TRAVEL

Beyond The Obvious

## **How to close a customer**

Madeline Jhawar, Travel Beyond the Obvious

*The surest way to find your  
dream job is to create it*

- Unknown

**Note** (this slide added after video was recorded):

This lesson could be called **Turning a Lead into a Customer**. If you've ever worked in Sales, that terminology is probably familiar!

It's very easy to find information, tips, and strategies online about turning leads into customers, but I didn't think that would be the best way for me to add value in this lesson.

Therefore, when I created this lesson, I decided it would be more useful to dive into specific examples from my own business rather than repeat general information that you can easily google.

So that's what I did in the video (except I forgot to mention it). If you'd like more information on this topic, there is a LOT you can read online - search for converting leads to customers.

# Let's review:

## Steps to online Customer Acquisition

1. Customer does internet search about your destination
2. Customer sees results from search
3. Customer clicks on your website
4. Customer reads useful information
5. Customer realizes that you can plan their trip
6. Customer researches you. [Reads your About page, your travel philosophy, reads about your services, your pricing, reads a sample itinerary, and reads reviews. Does a google search of your company and of your name.]
7. Customer contacts you

# Next Steps

You need the customer to:

1. Pick the planning service
2. Sign the agreement
3. Send a deposit

*Goal: customer signs  
agreement*

# Customer agreement

Your Logo Here

Your name here  
[Your website here](#)  
+1 123 456 7890

Date

Dear [client],

This is a letter of engagement between [client] and [your name here] of [your address here] d/b/a [your company here if you're dba]. Following our recent discussions, you have requested that [company] make a proposal for X days of [service level] trip planning for your [month] trip to [destination].

**Statement of Work:** Please see the description in Exhibit A.

**Fees:** Fees are \$[x] per planned day, for a project total of \$[y]

**Payment:** A deposit is payable upon the signing of this agreement. The remainder will be invoiced upon delivery of final itinerary. Amounts not paid within 30 days of the final invoice date will be subject to interest charged at the rate of 1% per month.

**Termination or Trip Cancellation:** This agreement may be terminated by either party in writing, upon which all fees for services rendered (calculated pro rata for work completed) will remain due. If the trip is cancelled after hotels have been booked, an additional cancellation charge of \$X per trip day will be applicable.

**Limitation of Liability:** Our liability is limited to the fees paid under this agreement.

[client], I am excited to be working with you! Please sign below and send back to me, and refer to invoice for initial payment.

Yours sincerely,

[your company]

[Your name]

Signed

\_\_\_\_\_

Date \_\_\_\_\_

[client]

Signed

\_\_\_\_\_

Date \_\_\_\_\_

# Customer agreement

“This is a letter of engagement”

Service level, fees, payment, and cancellation must be clear

This is the most important part!

Don't do any work until this is signed.

Your Logo Here

Your name here  
[Your website here](#)  
+1 123 456 7890

Date

Dear [client],

This is a letter of engagement between [client] and [your name here] of [your address here] d/b/a [your company here if you're dba]. Following our recent discussions, you have requested that [company] make a proposal for X days of [service level] trip planning for your [month] trip to [destination].

**Statement of Work:** Please see the description in Exhibit A.

**Fees:** Fees are \$[x] per planned day, for a project total of \$[y]

**Payment:** A deposit is payable upon the signing of this agreement. The remainder will be invoiced upon delivery of final itinerary. Amounts not paid within 30 days of the final invoice date will be subject to interest charged at the rate of 1% per month.

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**Limitation of Liability:** Our liability is limited to the fees paid under this agreement.

[client], I am excited to be working with you! Please sign below and send back to me, and refer to invoice for initial payment.

Yours sincerely,

[your company]

[Your name]

Signed

\_\_\_\_\_

Date \_\_\_\_\_

[client]

Signed

\_\_\_\_\_

Date \_\_\_\_\_

# The customer agreement

## Page 2: describe what service includes

Include the type of service

### Exhibit A - Statement of Work – Gold Trip Planning Services

Customized trip planning for an Italy trip in October 2018. Gold Travel Planning services with on trip support include:

- Tailored Overall itinerary, based on your interests
- Recommendations and Booking of accommodations
- Recommendations and Booking of daily activities
- Advice and Booking of all logistics including trains, car rental, and drivers or taxis
- Restaurant & food recommendations, dinner booking and pre-trip confirmation.
- A written itinerary, accessed via our free app with printable pdf version. The itinerary includes: a daily summary, contact information for all bookings, records of all confirmations, details on all additional recommendations.
- Cultural advice (on tipping, travel insurance, packing, and more) so you depart for Italy prepared.

List everything it includes

See included contract template for you to customize.

*Getting the customer  
from request to signed  
agreement*

# Three-ish types of customer requests

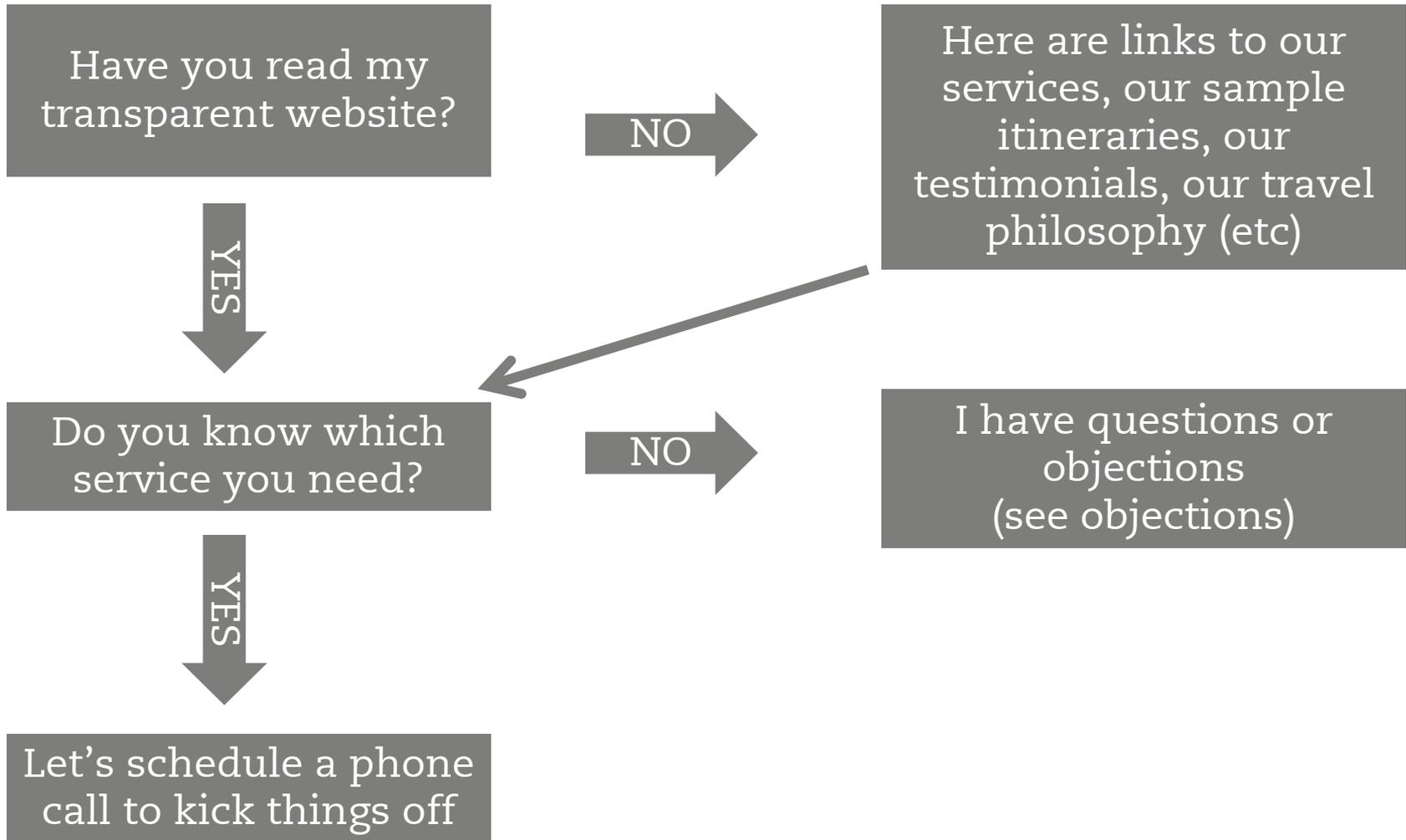
1. I'm a serious customer and I'm ready to go!
2. I'm not a serious customer but I have a lot of questions for you
3. I think I'm a serious customer and I have a few questions before I'm ready to go
  - a) After I get my answers, I'm no longer a serious customer
  - b) After I get my answers, I'm ready to go!

# Remember, you want the RIGHT customer

When you receive the request, figure out what do they know about you and your company and what do they need?

- Have they looked at your website?
- Have they looked at the different service levels?
- Do they understand that you charge fees?
- Are they independent travelers?
- Are they traveling in a small group?
- Are they looking for a private and custom vacation?
- Will you have enough time to plan their trip?

# Closing a customer: initial steps



# Closing a customer: communication tips

1. Start and end with enthusiasm! “THANK YOU so much for contacting us, we would LOVE TO HELP YOU”
2. Steer them to the service type: “Have you decided WHICH SERVICE best meets your needs?”
3. Schedule a phone call to close. “Would you LIKE TO CHAT about your trip?”
4. Tell client next steps, which are that:
  - You’ll send an agreement for them to sign
  - There will be an invoice for a deposit
  - You’ll send questions for them to answer so that you can make the best recommendations

NOTE that I recommend limiting phone calls before the customer has hired you. They should be to determine which service the customer needs. After they have hired you, they can talk as long as they want

# Three-ish types of customer requests

1. I'm a serious customer and I'm ready to go!
2. I'm not a serious customer but I have a lot of questions for you
3. I think I'm a serious customer and I have a few questions before I'm ready to go
  - a) After I get my answers, I'm no longer a serious customer
  - b) After I get my answers, I'm ready to go!

*Example:*  
*Good fit customer*  
*Ready to go*

# Good fit customer Ready to go

Highly relevant  
trip to Argentina

They give lots of detail about  
what they are looking for. They  
include email AND phone

Have reviewed the  
services

Name
Tor and Shani Perkins
Email and/or phone number
<input type="text"/>
When are you traveling to Italy?
Soon-ish...
How many in your group?
2
Please tell us about your interests for this trip, including any must-see or must-do sights or activities.
Hello! We had a great experience with <a href="http://deluxeargentina.com/">http://deluxeargentina.com/</a> and are looking for the same with you! :^)
We like Italian sports cars, mountain roads, wine/balsamic country, great food, castles, history and art, coastal towns, city and country and the local inhabitants. We're not looking to "rough it" anywhere and have a liberal budget...
We prefer to avoid crowds when possible and are not looking to spend too much time on our feet (I have some foot pain).
We live in Mill Valley, CA (near San Francisco).
We look forward to speaking with you!
Thanks,
Tor + Shani 415-381-2730
Which service are you interested in?
Italy Platinum Trip Planning
2+2=___ (this question is to weed out bots)
4

# Good fit customer

## Step 2: Schedule a phone call

Is this feasible on my end?

Since they are serious,  
schedule a phone call

**Madeline Jhavar** <madeline@italybeyondtr> Mon, May 14, 6:51 PM ☆ ↩ ⋮  
to torp ▾

Dear Tor and Shani,

Thanks so much for getting in touch! We'd love to help you with an Italy trip, although my first question is, what do you mean by "soon-ish"?

I can give you a call tomorrow if you're available in the afternoon (pacific time)?

Kind regards,  
Madeline

--

Madeline Jhavar  
Owner, Italy Beyond the Obvious  
[www.ItalyBeyondtheObvious.com](http://www.ItalyBeyondtheObvious.com)  
+1 773 621 3024

# Good fit customer

## Step 3: Send agreement

Start and end with enthusiasm!

Tell them what they need to do and what next steps are.

**Madeline Jhavar** <madeline@italybey>  May 16, 2018, 5:23 PM     
to Tor, Shani ▾

Tor & Shani,

It was great talking to you earlier today about your Italy trip!

Please see the attached agreement, and invoice for deposit, for 10 days of Platinum Travel Planning services. If your trip ends up being longer than 10 days, I can modify.

If everything looks good, please sign the agreement and return to me, and I will kick things off! That means that I will send you specific recommendations that I think you'll love, so that we can put together your Italy itinerary.

Usually in this email I include a few additional questions, but I reviewed my notes from our call and I don't have anything else to ask you right now.

I'm excited that I get to help you with this Italy trip, and I look forward to working with you!

Kind regards,  
Madeline

# Three-ish types of customer requests

1. I'm a serious customer and I'm ready to go!
2. I'm not a serious customer but I have a lot of questions for you
3. I think I'm a serious customer and I have a few questions before I'm ready to go
  - a) After I get my answers, I'm no longer a serious customer
  - b) After I get my answers, I'm ready to go!

*Example:  
Not a good fit customer*

# Signs of a not-a-good-fit customer

Vague date

Solo traveler

References bus routes,  
asks questions

No evidence he has  
reviewed services

Name
Mr. Lorenzo Galarza
Email and/or phone number
<input type="text"/>
When are you traveling to Italy?
2019
How many in your group?
1
Please tell us about your interests for this trip, including any must-see or must-do sights or activities.
Visiting your country for first time. Wanting to see sites of Cefalu, Palermo, Corleone, Monreale, Segesta, Erice, Trapani, Arrigento, Armerina Piazza, Ragusa, Modica, Noto, Syracuse, Catania, Mt. Etna and Taormina. Cannot seem to find any one bus route that connects to all locations. Can you please help? Thank you very much.-Lorenzo G.
Also interested in all three islands of Malta but did not see anything listed for Malta. Any suggestions? Please?
Which service are you interested in?
Not sure
2+2= ___ (this question is to weed out bots)
4

# My Initial Response

1. THANK YOU for contacting us
2. We would love to help you
3. Have you looked at our services?

In this case, I was trying to be helpful with a link to info but I am not going to spend time on his request

Dear Lorenzo Galarza,

Thanks for getting in touch!

Are you interested in Italian travel planning or just information on bus routes? You are correct that there isn't one bus route that connects all locations.

This information might help you

<https://www.italybeyondtheobvious.com/getting-around-sicily-by-public-transport>

Let us know if you would like travel planning help.

Malta is not in Italy which is why we don't have information on our website but it's very easy to get to from Sicily.

Kind regards,  
Madeline

# Focus on client choosing a service

**Loren Galarza** <loren\_gallo@yahoo.com>

May 15, 2018, 7:49 PM



to Madeline ▾

Hello Madeline, Ciao. Sorry it took so long to get back to you. Type of person who needs time to sort things out. I read about five step process and still little confused about pricing. Mainly looking for transportation around Sicily and understand buses are way to go. I suppose I could book my own hotels and on a diet so food is out of question.

Looked at bus schedules and schedules were helpful. I usually pick a home base (city) and work with tour company that runs out of lobby, either that or Expedia. Tripadvisor or Viator. I move home bases when tours do not cover areas I have not visited. Am not sure what this has to do with anything. Ill be in touch if I ever figure out how all this is going to work. Thank you for your time and your jab about Malta not part of Italy..-Lorenzo G.



**Loren Galarza** <loren\_gallo@yahoo.com>

Tue, May 15, 8:42 PM



to Madeline ▾

Hi. I guess next step for me is to see which city (home base) has the most amount of other cities on my list within its transfer points, including Pacino.



**Loren Galarza** <loren\_gallo@yahoo.com>

May 16, 2018, 11:30 AM



to Madeline ▾

Hi. Thinking out loud, shooting for the first two weeks of November\_2019. By myself as the independent traveler that I am.



Hi Loren,

Please start by reviewing our table of Italy travel planning services and associated fees and let me know which service works best for you.

<https://www.italybeyondtheobvious.com/fees>

If you are only looking for transportation then to be honest, we may not be the best fit for you as we are a full service travel planning company.

Let me know if you have any questions.

Kind regards,

*Example:  
Good fit (?) customer  
With questions or  
objections*

# Good fit (?) customer With questions

Detailed, which is good.  
Wants “some days to ourselves”  
Refers to “not deluxe travelers”  
Ends with a red flag

Has reviewed the  
services

<b>Name</b>
Joyce Berman
<b>Email and/or phone number</b>
<input type="text"/>
<b>When are you traveling to Italy?</b>
September 28 - October 7
<b>How many in your group?</b>
2
<b>Please tell us about your interests for this trip, including any must-see or must-do sights or activities.</b>
<p>We are flying into Rome and out of Rome - we would like a day there on the back end....we are not sure to base ourselves in Ravello, were not planning on getting a car, but will do so if necessary. WE would not mind being a part of a tour group, but want some days to ourselves. Would love to see Capri, Positano - like to hike a lot. Like the beach...Looks like that ceramics town would be of high interest.</p> <p>We are not deluxe travelers, happy to stay in small hotels, B&amp;Bs....but like to be in the city where we can walk to places straight from hotel. Wait do I have to pay you??</p>
<b>Which service are you interested in?</b>
Italy Travel Coaching
<b>2+2=___ (this question is to weed out bots)</b>
4

# Good fit (?) customer, with questions

## Step 1: answer her questions

Thank you

Make sure it's the right customer

We'd love to help!

Hi Joyce,

Thanks so much for getting in touch!

I should answer your last question first: travel coaching is a \$750 flat fee. We are an Italy travel planning company. All trips we do are custom so we don't sell group tours.

Please let me know if we can help with your trip!

Kind regards

Madeline

*Example:*  
*Good fit customer*  
*With questions or*  
*objections*

# Good fit customer With questions

Flexible budget is a good sign  
Upper end accommodations is a  
good sign  
Hiking, wine, food, towns are a good  
fit

She needs info

<b>Name</b>
Brenda Moore
<b>Email and/or phone number</b>
<input type="text"/>
<b>When are you traveling to Italy?</b>
October 2018
<b>How many in your group?</b>
2
<b>Please tell us about your interests for this trip, including any must-see or must-do sights or activities.</b>
Have never been to Italy before. Traveling with husband. Would like to stay around 2 weeks. Interested in Venice, Florence, Rome (just a couple of days here) and Amalfi coast. Flexible budget. Prefer upper end accommodations. We like to be fairly active and enjoy hiking, wine, food, exploring towns, etc.
<b>Which service are you interested in?</b>
Not sure
<b>2+2=___ (this question is to weed out bots)</b>
4

# Good fit customer with questions

## Step 2: Phone call to discuss service

1. Start and end with enthusiasm.
2. Decide on the service type.
3. Set up a phone call.

**Madeline Jhawar** <madeline@italybey> Aug 5, 2018, 3:41 PM ☆ ↩ ⋮  
to brendaemoore ▾

Dear Brenda,

Thanks so much for getting in touch!

Since you aren't sure which planning service best meets your needs, would you like to schedule a phone call to discuss?

I'd love to chat with you about your Italy trip!

Best,  
Madeline

--

Madeline Jhawar  
Owner, Italy Beyond the Obvious  
[www.ItalyBeyondtheObvious.com](http://www.ItalyBeyondtheObvious.com)  
+1 773 621 3024

# Good fit customer with questions

## Step 3: Address questions

Focus on the service

**Brenda Moore** <brendaemoore@gmail.> Aug 6, 2018, 1:30 PM ☆ ↩ ⋮  
to Madeline ▾

I don't have great cell service. Any way we can do by email?

⋮

**Madeline Jhavar** <madeline@italybey> Aug 6, 2018, 1:36 PM ☆ ↩ ⋮  
to Brenda ▾

Sure, no problem.

Please let me know how I can help --- are you not sure about the type of planning service you need?

⋮

She read more about the services

**Brenda Moore** <brendaemoore@gmail.> Aug 6, 2018, 1:52 PM ☆ ↩ ⋮  
to Madeline ▾

Well I read more about it. Would for sure like some help with itinerary, transportation, getting tour/tasting/etc bookings, lodging options and restaurant recommendations. We like to do some planning ourselves and have some open options but I was wondering if our time frame will allow for that. Since we are only two months or so out will we have problems booking any tours, etc on our own? Are hotels generally booked already for that time frame?

# Step 3, cont: customer questions

**Madeline Jhawar** <madeline@italybeyr> Aug 6, 2018, 2:01 PM ☆ ↩ ⋮  
to Brenda ▾

There will be no problem with hotels in Rome, Florence, and Venice. The issue might be with the Amalfi Coast --- there it depends on what town you want to stay in (we will discuss) and your budget, and of course if you'd like anything specific like a balcony, sea view, or suite. The more flexible you are, the more options there are.

I follow a trip planning process that goes Overall Itinerary -> Hotels -> Activities / Tours -> Logistics -> Restaurants. So in your case, after we get the itinerary pinned down, I'd dive right in to the Amalfi Coast hotels to get that booked first.

In terms of booking tours on your own, I'd recommend letting me book one tour or activity per day, with a half day open. That way you always have something you can count on, and you also have time to check out things on your own. Sometimes, the activity I put in your itinerary includes all of the details, but nothing is booked. So for example it might be exploring a town or doing a hike on your own. I'll tell you to call a taxi, give info about where to go, how long it takes, how much it costs, how much time you need, when to start, what order to go, opening hours etc.

If you get to Italy and discover that a tour you were interested in isn't available at least you already have a solid trip. Tours can be iffy when left to the last minute but it depends on what types of tours you like. If you would like a private guide, then I would definitely book that in advance. OTOH, if you're happy joining the group tour that departs every hour that is run by the museum (as an example), then in your itinerary I would just include the address, tour departure times, cost, and anything else you need to know. Then you could just show up and take the tou --- or not. It would be flexible.

Emphasize that “it depends”  
based on client preferences

Talk about the process

Address client concerns about  
the approach

# Step 3, cont: customer questions

She now trusts me

**Brenda Moore** <brendaemoore@gmail.com> Aug 6, 2018, 2:42 PM ☆ ↶ ⋮  
to Madeline ▾

So based on this info, what level of planning would you suggest I need? What are the associated fees?

⋮

Steer her towards the best fit

**Madeline Jhavar** <madeline@italybey.com> Aug 6, 2018, 4:40 PM ☆ ↶ ⋮  
to Brenda ▾

I think Gold planning is the best fit for you. That includes the overall itinerary, hotel bookings, one activity per day (half day open) and a dinner reservation. Gold does not include on-trip support but that can be an optional add-on. Gold fees are \$225 per travel day and on trip support is \$50 per travel day (entire trip only).

Tell client the next steps

If that works, let me know and we'll get started, which means I will send you an agreement to sign with an invoice for a deposit of fees. Then I will send you a few additional questions and dive in. I will own the project and make sure everything gets done.

# Step 3, cont: customer questions

She has one final question

**Brenda Moore** <brendaemoore@gmail> Aug 7, 2018, 8:11 AM ☆ ↩ ⋮  
to Madeline ▾

Before I commit to the agreement, can you give me a rough idea of what the total cost would be for the trip for my husband and me? This could be daily or all in, with or without food/drink. Just to get an idea before moving forward. Our budget is pretty flexible but we obviously appreciate value. Thanks.

...

Breaking down the budget  
Emphasize it is personal  
Emphasize it is flexible

**Madeline Jhawar** <madeline@italybey> Aug 7, 2018, 9:02 AM ☆ ↩ ⋮  
to Brenda ▾

Hi Brenda, Sure - I work within your budget and will create the trip based on your preferences so the costs are hard to predict exactly, but I can definitely give you an idea. If you stay in 4 or 5 star hotels, and do one half-day private tour per day, and do not need private drivers everywhere (so train, rental car and the occasional taxi or short driver are okay for getting around), then a good number to think about is about \$1k per day, total for both of you. That number would include the hotel, the tours, the transportation, and the meals.

That number doesn't include flights or my fees, or any higher end activities you might choose such as a behind-the-scenes Vatican tour; a balloon ride over the countryside; or dinner at a very high end restaurant. If you would like suites at all the hotels or private drivers to take you from A to B for example, that number goes up. OTOH if you don't want private guides, or you want to take it down a notch for the hotels, it will be less.

# Step 4: Client decides service

Client decides on service  
Comments that she liked a  
sample itinerary

**Brenda Moore** <brendaemoore@gm: Aug 16, 2018, 10:08 AM ☆ ↩ ⋮  
to Madeline ▾

Hi, Madeline. I am back to planning mode and would like to move forward with your gold planning services. Our flights are booked arriving Rome Oct 13, 2018 and departing Venice Oct 26, 2018. Not sure if you need this detail now, but am thinking 3 nights Rome, 5-6 nights Tuscany/countryside, 2-3 nights Florence, 2 nights Venice as a starting point and subject to change based on your input. I really liked your sample Umbria & Tuscany gold tour on your website and would like to combine some of these ideas with some experiences in Rome and Venice. I will look for your email with the agreement to sign and look forward to getting started. Thanks.

⋮

I confirm she is moving forward  
Next steps: agreement and  
questions

**Madeline Jhawar** <madeline@italybe: Aug 16, 2018, 5:39 PM ☆ ↩ ⋮  
to Brenda ▾

Hi Brenda, Great to hear you'd like to move forward!

I'll send you the agreement for Gold planning services and then I'll kick things off with a few initial questions for you.

More soon....



I'd like to hire you!

# After the customer says YES

1. Send them the agreement and invoice
2. Ask them to sign the agreement, return it to you, and send you the payment of the deposit. I usually make the deposit \$1,000 or 50%, whichever is less.
3. Send the customer your initial questions to kick things off
4. AFTER you have received the deposit and the signed agreement, send your thoughts to the customer

# Initial Customer Questions

1. How did this destination win the jackpot? What made you say “I want to go there and do that”. Make sure you include anywhere you specifically want to visit or sights you definitely want to include.
2. Please describe an ideal day as you imagine it on this trip.
3. Describe your previous travel experience. Have you been to a foreign country before / experienced jet-lag etc?
4. Accommodations. Do you prefer large hotels, small hotels, B&Bs, apartments, farmhouses or other? Do you like amenities such as an on-site restaurant or bar or gym or pool. Do you like room amenities such as a view or a balcony or a suite. If you have a budget or an average budget, please let us know what that is.

# Initial Customer Questions, cont.

5. Transportation. Please let us know whether you are okay to rent a car if needed, or whether you need advice here; and whether you are happy to take the train, or would prefer private drivers or taxis.
6. Food. Please let us know about any food allergies or preferences such as vegetarian or gluten-free.
7. Special interests. Please let us know about special interests of any travelers, such as a deep interest in Renaissance art or cooking
8. Please send names of all travelers, ages of children, and the best cell phone number where you can be reached while traveling

# Tips: How to Cover Your Ass and Make Yourself Look Good

- ❑ Accept the right type of customer
- ❑ Don't work with the wrong customer. Do not set yourself up to fail.
- ❑ Under-promise and over-deliver: better to tell the customer you “may” be able to do that for them, then hit it out of the park.
- ❑ Don't move forward until the customer signs the agreement with the limited liability clause
- ❑ Do not make any non-refundable payments without written authorization from the customer



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## **How to close a customer**

Madeline Jhawar, Travel Beyond the Obvious