



TRAVEL

Beyond The Obvious

The Five-Step Travel Planning Process **Part 1: Intro**

Madeline Jhawar

“Start your first business this way: Begin with the smallest possible project in which someone will pay you money to solve a problem they know they have. Charge less than it's worth and more than it costs you.

Repeat.

You don't have to wait for perfect or large or revered or amazing. You can start.”

- Seth Godin

Let's recap...

- ✓ Your website is set up with information about you, your fees, your services, and a sample itinerary or two
- ✓ You've written blog articles with content that google has indexed and you've created a regular blogging calendar
- ✓ You're spending time building and maintaining an online presence
- ✓ Now finally! You've been contacted by a client.
- ✓ You closed them, they signed your agreement, sent you a deposit, and answered your questions.

Now what?? Now the fun begins!



Your job now is to:

1. Understand the client's interests (initial questions)
2. Make tailored recommendations for hotels, activities, logistics, and food
3. Put all the pieces together into an itinerary that:
 - ✓ includes client highlights
 - ✓ is a realistic pace
 - ✓ can be achieved by the client as an independent traveler
4. Book and confirm all details (depending on service)
5. Communicate updates during the planning; make sure the client has all relevant information during the trip.
6. Send the client on a stress-free pre-planned vacation where everything goes smoothly!

But you *also* have to:

- Continue writing blog posts and marketing
- Talk to and close other potential clients
- Do your accounting / books
- Keep up to date with your recommendations, so read, research, network
- Not let any detail fall through the cracks!



The Five-Step Travel Planning Process
is your **secret weapon**
to working efficiently and
keeping all details organized!

I follow the same 5-Step Process for
all service levels

Components of a vacation



Overview: 5-Step Travel Planning Process

1. Overall Itinerary
2. Accommodations
3. Tours / Guides / Activities
4. Logistics
5. Food

For your destination, ask yourself:

1. Are these steps in the right order? In Italy:

- The overall itinerary must be done first. It's a waste of time to move forward with bookings until you have specific dates
- The hotels must be done next, so that we know where the client is physically located for the tours and activities
- The tours and activities must be done before the logistics, since the logistics will be arranged to get the client to and from the activities
- The vast majority of restaurants in Italy can be booked ~2 weeks in advance so this step is last
- Ask yourself these questions for your destination and put these steps in the best order
- If for example, restaurants must be booked months in advance in your destination, then maybe food is Step 3 and logistics is last

For your destination, ask yourself:

2. How far in advance can / must each piece be booked? For example, in Italy:
 - Hotels can be booked a year in advance or more, but a minimum of a couple months in advance in high season
 - Local guides usually cannot be booked a year in advance, but should be booked 3 – 6 months in advance ideally
 - Trains, drivers, and car rental cannot be booked far in advance

Knowing this information will help you:

- Not accept clients who contact you last-minute. Don't set yourself up for failure. Understand how much time you need to execute successfully.
- Set deadlines for your 5-Step travel planning process

7 reasons you need a process

- Allows you to manage multiple projects at the same time
- Will allow you to look at each project and know what's been done and what's left to do
- You'll work efficiently; you'll avoid repeating tasks
- You won't forget details
- Allows you to laser focus on one piece at a time
- Makes it easy to organize client requests by category (hotels, food, tours etc)
- Makes you seem organized to the client, gives them peace of mind

Before you kick off the process, set up the client project

3 Tips on setting up the client project

- ❑ Create an email folder so that ALL client communication can be easily found
 - I have a folder called 2018 clients and then sub-folders for each client
 - I color-code the client folders based on the service level, so I can quickly scan the list of 2018 clients and see how many I have of each service level
- ❑ Create a folder in your computer where you'll store client documents such as signed agreement, invoice, and confirmations during the booking process
- ❑ Create a spot to store trip information that is NOT email. This could be a Word document, Evernote, or an online project management tool such as Basecamp or Trello or Asana.

Add information from client questions to project


5. Food


4. Logistics


2. Accommodations


1. Overall itinerary


3. Activities


 [1909. Danise Holloway, Sept 4 - 21](#)


 **Travelers**
Madeline Jhawar • 4:49pm —


 **Food**
Madeline Jhawar • 4:48pm —

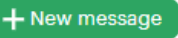
 **Getting Around**
Madeline Jhawar • 4:48pm —

 **Hotels**
Madeline Jhawar • Dec 3 — All of us like to stay in Centro so we can walk or easily taxi back to our lodging. We all prefer to stay in smaller, more typical though nice, Italian


 **Flight Info**
Madeline Jhawar • Dec 3 —

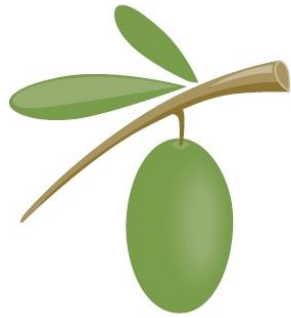
 **Itinerary**
Madeline Jhawar • Dec 3 — Arrive MXP on Wed, 9/4 4:30pm, transfer to Lake Iseo Wed. 9/4: Transfer MXP to Lake Iseo Wed 9/4 - Fri 9/6 or Sat 9/7: Lake Iseo (Hotel Rivalago,

 **Client Interests**
Madeline Jhawar • Dec 3 — This is the first time we will be traveling with this other couple, so I want to be sure we stay in great locales, have interesting experiences and

 + New message

Message Board

All messages 



TRAVEL

Beyond The Obvious

The Five-Step Travel Planning Process **Part 2: The steps**

Madeline Jhawar

Overview: 5-Step Travel Planning Process

1. Overall Itinerary
2. Accommodations
3. Tours / Guides / Activities
4. Logistics
5. Food



Step 1: Create the Overall itinerary

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

Brainstorm trip highlights

- Review client's interests
 - Note any “must see’s”
 - Note any logistical limitations (no rental car for example)
- Brainstorm activities you think the client would love
 - Group these into geographic chunks
 - Keep logistics in mind (don't suggest something they won't be able to do)
 - Include links to specific activities if helpful
- Send your ideas to the client and ask for feedback (ask them to prioritize ‘yes’ vs ‘no’ vs ‘maybe’)
 - Use language to emphasize these are custom recommendations
 - For example: “Since you said....” “Because you like....”

Step 1 example: Client email w tailored recs

COMMENTS RE DESTINATIONS

RE Rome

Since you arrive Rome and depart Venice, those two places account for part of the trip. Since you don't want to see the Vatican museums, I think 2 days is enough in Rome. Because you have a half day on your arrival day, I would do another full day and then another half day in Rome.

RE Amalfi Coast

Since you mentioned Pompeii, and when we spoke you asked about the Amalfi Coast, let's keep that area in mind. Pompeii is about 30 minutes from Sorrento which is the first town on the Amalfi Coast. So you could either do Pompeii as a day trip from Rome or you could do it as part of an Amalfi Coast itinerary.

I think having some coastal time on this trip will be great, because it is going to be HOT. It very well may be 100 degrees on some days, so the coast will be perfect. That said, the Amalfi Coast is extremely touristy, especially in August. So I would recommend avoiding the towns of Sorrento and Positano as a base. Certainly visit them, just don't stay there as they will be very crowded.

One additional comment on the Amalfi Coast: the hotels are some of Italy's most expensive. You will need 2 rooms, and if you want a sea view, then 3 nights on the Amalfi Coast can easily run \$8 - \$10k. That includes the room, the taxes, and breakfast at a nice hotel with sea views and probably a pool. If that is going to break the bank then we should discuss visiting Pompeii as a day trip from Rome and maybe doing a different water destination. Right now, the mid-range places on the Amalfi Coast are sold out for August. There are basic B&Bs available and there's plenty of inventory at the high end..

RE Countryside

Since you mentioned cycling and since the cities will be busy, I would definitely add a countryside leg to this trip. You could do the Tuscan countryside, which is famous and iconic. Or you could get off the beaten track a bit and do the Umbrian countryside. Driving in the Italian countryside is not stressful, although I know you said you'd prefer drivers and trains to a rental car. Staying in the countryside and using drivers is completely possible so we can discuss when we get to accommodations.

Here you could explore towns, hang by the pool, eat good food, do those bike rides, and it's a great place for a cooking class.

RE Venice

I love Venice but it is going to be very hot and very crowded in August. I can help you get away from the crowds, but the secret is to stay centrally, and do much of your exploring in the evenings, after the daytrippers have left. So I would do 2 evenings but one full day in Venice.

Example of Step 1 Client Email: response

Madeline:

Thank you. Our thoughts are as follows:

1. We like the overall itinerary. While in Tuscany it would be nice to spend some time in Florence as well as see Pisa if possible.
2. I'd prefer not to spend \$3k per night for a hotel on the AC if there is a nice alternative. That said, I'll pay that if there are not nice options. We generally don't need to stay in the ritziest hotel but we can pay the freight if there isn't a viable alternative.
3. I have no problem driving a rental car.
4. What you've suggested in terms of day trips looks great.
5. We are not huge museum people. Perhaps a museum in Florence would work well.
6. If there is any way Cal and I can ride during a couple of afternoons that would be great. We'd need to rent bikes.
7. Having pools or beaches where the kids can chill on as many days as possible will be key.
8. Your call re Tuscany but we'd probably not lean towards a lot of time in the countryside.

Is this helpful? Do you need more input?

Example of Step 1: my response

1. We like the overall itinerary. While in Tuscany it would be nice to spend some time in Florence as well as see Pisa if possible.

Great! Based on your comment here, and your comments #7 & 8, I am thinking that it would make the most sense to not stay in the countryside, but to stay in Florence. Or very close to Florence, just outside the town, maybe somewhere with a shuttle into town. That would allow you to easily visit Florence, easily visit Pisa, and have a place with a pool. My only question here is regarding Venice. In Rome, I can book you a place with a pool, same in Florence, same on the Amalfi Coast. In Venice, there are only a couple hotels with pools and I'll send you those options. There are beaches in Venice though, and maybe you want to do that for half a day?

2. I'd prefer not to spend \$3k per night for a hotel on the AC if there is a nice alternative. That said, I'll pay that if there are not nice options. We generally don't need to stay in the ritziest hotel but we can pay the freight if there isn't a viable alternative.

Hotels is the next step. I'll check availability for your specific dates and send options.

3. I have no problem driving a rental car.

Ok great to know. It may not make sense for this trip, might be easier to just take trains and do the occasional taxi. The hotels will be the determining factor here.

4. What you've suggested in terms of day trips looks great.

5. We are not huge museum people. Perhaps a museum in Florence would work well.

Florence has two famous museums, the Uffizi Gallery and the Accademia Gallery (where David lives). The former requires a 2.5 hour visit, at a minimum. The latter you can do in 90 minutes - 2 hours, so that may be a better fit for your family?

6. If there is any way Cal and I can ride during a couple of afternoons that would be great. We'd need to rent bikes.

I've got you on one bike ride in Tuscany and one on the Amalfi Coast if that works?

7. Having pools or beaches where the kids can chill on as many days as possible will be key.

I've re-jigged a few days to add those.

8. Your call re Tuscany but we'd probably not lean towards a lot of time in the countryside.

Glad to hear that -- with the changes above that will work well.

Putting it all together

1. Start with the dates
2. Include flight times if possible
3. Add the main activity of the day
4. Add the logistics and how much time it will take
5. Add where they will sleep
6. Send to client, get client's OK

POSSIBLE ITALY ITINERARY

Tues July 31st

11.20 AM Arrive Rome
Intro to Rome tour
Sleep Rome

Wed Aug 1st

AM Sleep in
Colosseum & Forum tour with private guide
Sleep Rome

Thurs Aug 2nd/

AM Rome (shopping?)
Transfer to Amalfi Coast by train and driver (~3 hours)
Sleep AC

Fri Aug 3rd

Amalfi Coast: Boat trip to Capri
Sleep AC

Sat Aug 4th

AC: Visit iconic towns of Positano and Ravello
Sleep AC

Sun Aug 5th

AM Visit Pompeii on your way up
Transfer to Tuscany
Sleep Tuscany

Mon Aug 6th

Tuscany: explore countryside towns
Sleep Tuscany



Step 2: Accommodations

Research, recommend, and book



Tips for recommending accommodations:

- ❑ Do not start this process until you have EXACT DATES or it will be a waste of time
 - If the overall itinerary is done, and the client needs to go book flights, tell them to go do that first
- ❑ ONLY send recommendations that are available for the client's dates, AND within their budget, AND in an excellent location, AND according to their preferences.
 - For example, I check bed configurations, AC, Wi-Fi, whether breakfast is included, exact location, parking, pool, elevator, and cross-check reviews
- ❑ Send recommendations by place (1 email per place)
- ❑ Include 3 – 6 options for the client to review
- ❑ Don't recommend places with only a few rooms left

Doing the above will make you look good & keep you organized!

I recommend hotels for clients using the same process I'd use to find hotels for myself.



This is different than what a travel agent does. They make a money from hotel commissions, therefore they need to recommend and book places that offer commissions. You do not have this restriction.

Customize accommodation recs

Type of accommodation	Type of room	Amenities
<ul style="list-style-type: none">• Large hotel• Boutique hotel• B&B• Resort• Farmhouse• Apartment• Airbnb / VRBO• Other	<ul style="list-style-type: none">• Double room• Suite• Interconnecting rooms• Family room• With kitchen• With laundry• With view / balcony / other	<ul style="list-style-type: none">• Front desk• Onsite bar• Onsite restaurant• Pool• Gym• Concierge• VIP benefits• Get to know the owners

Set Client Expectations: email template



Liz,

I'm going to start sending recommendations for accommodations for your trip in separate emails, by destination, starting with Praiano.

Everything I recommend will be (1) available for your specific dates (2) in an excellent location and (3) according to your preferences (you said you like unique places, no big hotels, and want to be able to walk to dinner).

I think I can find you some great options that fit those criteria!

Because I aim to avoid information overload, I'll send just a few recommendations (ideally 3, max 4) for each place. So don't hesitate to ask for additional options if what I send is not quite what you are looking for.

A few things to note:

RE: Booking.com

If a hotel is listed on [booking.com](https://www.booking.com), I'll send you the hotel link on [booking.com](https://www.booking.com) rather than the hotel website, because the site is a great one-stop shop to see hotel information and photos, check hotel location on the map, rates, and **most importantly, read reviews.**

RE: Reviews

Definitely read the reviews before booking, because there may be things in there that I don't know you like or dislike. For example, reviewers might write that the water pressure in the shower is low or that the wifi is unreliable or that the breakfast is limited, and those may be deal breakers for you.

RE: Rates & booking

The rates on [booking.com](https://www.booking.com) are usually very competitive and there are some great pre-paid deals. But I will make the booking directly with the hotel, which **gets you better service.** You can save a lot of money by booking the pre-paid rates, which will always be lower (usually about 10% lower), but the catch is that you can't cancel or modify the reservation.

But if that's okay, we can book the lower rates and I can keep track of all pre-paid items. Then we can discuss travel insurance to cover everything once we have the non-refundable final \$\$ number.

Consider booking.com for research



1. For the search

- Set filters for the client's dates, price range, type of accommodation, star level
- Click to show only available properties
- Sort by number of reviews
- Choose the client's currency and language

2. To narrow down the options

- Look at photos
- Read *recent* reviews, and cross-check other sites for reviews if you have time
- I often don't even consider places with fewer than several hundred reviews
- Double check budget, and what's included (breakfast, parking?)
- Check logistics (centrally located, parking, lots of stairs or hills?)

3. Send client email

- Link to booking.com and also hotel's website if you want
- Include rates and anything you think is noteworthy (discounted pre-paid rate?)

Send client hotels: sample email

Liz,

On May 22nd, you'll wake up on the Amalfi Coast and transfer to Siracusa, where you'll spend 4 nights. We discussed the Algila hotel on the phone, so I am including that hotel -- which as I mentioned, is a fantastic hotel but one of the most expensive in town. So I am including a few other options for you to look at.

All of these hotels are in the old town of Ortigia:

[Algila Hotel](#)

A classic double room at this hotel is \$298 / night including breakfast and taxes, and that is a non-refundable pre-paid rate. I can get the refundable rate from the hotel if you don't want to pre-pay.

[Hotel Henry's House](#)

Double rooms here are \$233 / night, includes breakfast and taxes and that is a refundable rate. I book this hotel quite a lot -- it's a great place to stay.

[Domus Mariae](#)

This is a lower cost option but still a great place to stay. Double rooms are about \$110 / night including breakfast and taxes, and they have one double room with sea view available for \$145 / night.

I'm going to leave it there so as not to inundate you with options but let me know if you'd like to see more.



Hotel booking tips

- ☐ Before you can book the hotels, you need to get the client's credit card information
- ☐ Always book directly with the hotel / apartment / B&B if possible
 - Send an email with your request
 - Or book on the hotel's website
- ☐ Set yourself up as an affiliate with booking.com
 - If hotel does not allow email booking or online booking, use booking.com
 - You can get a very small commission, and “genius” rates, which makes you look good. No need for an IATA number, booking.com will wire the money directly to your bank account.
- ☐ Ask the hotels for net rates; tell them your client will pay directly
- ☐ Do not book any non-refundable rates without written client authorization

Hotel booking tips, cont.



- ❑ If a client wants to stay in an Airbnb, they should book it themselves. You can send them recommendations but you should not be the bottleneck between the owner and the client
- ❑ Ask the hotels for net rates; tell them your client will pay directly
- ❑ Communicate: Tell the client as soon as you book the hotel
 - Tell them about charges hitting their card: the amount, the date, and how it will be listed on their statement

Steps 1 & 2 (the overall itinerary and the hotels) are the most important steps.

Spend the most time on them, get them right.

It's difficult and time-consuming to adjust the itinerary after bookings have been done.



Step 3: Activities

Recommend and book



General -> Personalized

In this step, you take the general recommendations you outlined in the overall itinerary and send the client specifics. You may need to ask more questions here. For example:

Vatican Tour

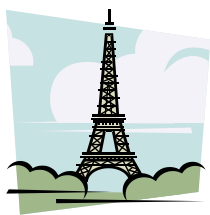
- Small group tour vs private tour
- Morning tour vs afternoon tour
- 2 hour tour vs 4 hour tour
- General guide, kid-friendly guide or deep dive guide
- VIP tour

Cooking class

- Led by an Italian grandmother vs a professional chef
- Lunch vs dinner
- Includes market tour or city walk before the class?
- Family-friendly class?
- Hands-on vs mostly spectator

Remember: you are making *tailored* and *personalized* recommendations based on your client's interests.

You are not necessarily recommending your favorite places.



Activity booking tips

You will be booking private guides who are used to working with travel agencies, so you need to understand their language.

Local tours: Travel Agency Model

- Travel agent pays for the tour in advance
- Client then pays the travel agency
- Guide gives travel agency “net” rates, so that they can be market up or
- Guide sends commissions afterward

Local tours: Consultant Model

- Sends deposit in advance if needed
- Client pays the remainder due at the time of the tour
- If guide gives you net rates, tell them they can mark up if they’d like
- Tell the guide you don’t take commissions

I tell my guides:

I don't take commissions. Do a great job for our mutual clients and I will keep sending you clients



Step 4: Logistics Recommend and book

AVIS



Logistics are the secret sauce of a trip. If they flow smoothly, nobody notices. If they break, it can add stress to or ruin a trip.

Booking Logistics



As a destination expert, you can add a lot of value here.

Logistics includes ANYTIME a client needs to get from A to B.

- ☐ Airport transfers
- ☐ Rental cars
- ☐ Train transfers
- ☐ Pre-booked professional drivers
- ☐ Call-it-yourself taxis / Uber / Blablacar etc.
- ☐ Getting from A to B on foot
- ☐ Ferries
- ☐ A DIY day in a city or countryside

Tips on Logistics

In this step, give the client details regarding the logistics that you recommended when you created the overall itinerary. The client should clearly understand:

- ☐ Meeting point and how to get there (train station for ex)
- ☐ What time to depart the hotel
- ☐ How long the transfer will take
- ☐ How much the transfer costs
- ☐ Contact information for the driver
- ☐ What will be paid in advance
- ☐ How much will be due at the time of service
- ☐ Method of payment (cash vs credit card)
- ☐ What else is needed (tickets, confirmation pages, a tip)





Step 5: Food Recommend and book



Food recommendations & booking tips



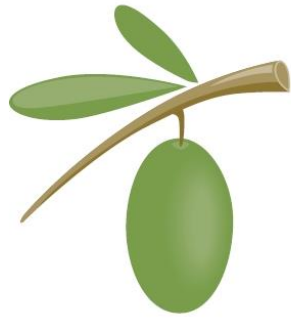
Remember these are tailored recommendations for a specific client. They may not be your favorite places. I suggest:

- ☐ Map the route to dinner restaurants before recommending them. Some people do not want to spend 30 minutes getting to and from dinner at the end of a busy day.
- ☐ Ask the client if they are okay eating at the local dinner time and coach them on alternate options if needed.
- ☐ Balance big dinners with small lunches or vice-versa.
- ☐ If a client wants some fancy meals, don't put them back-to-back
- ☐ Create a checklist for the client of local foods to try
- ☐ If requested: recommend cafes, markets, and street food
- ☐ Ask the client whether there's anywhere they want to eat

Travel Tips

Before departure, send clients an email with your travel tips for your destination. These tips could include:

- ☐ Packing advice
- ☐ How to get money in the destination
- ☐ Technology advice / international cell phone plans
- ☐ How to plug things in and any adaptors needed
- ☐ How to communicate (phrase book vs google translate)
- ☐ Guidebooks you recommend
- ☐ How to do laundry
- ☐ Advice on tipping
- ☐ Advice on travel insurance if you're not helping w this
- ☐ Where they can get local maps



TRAVEL

Beyond The Obvious

The Five-Step Travel Planning Process Part 3: Tips












Madeline Jhawar

Managing the 5-Step Process: Tip #1

Create a high-level, at-a-glance page with current status of each project



EXAMPLE AT-A-GLANCE PROJECT GRID

Client Name	Service Type	Travel Dates	Overall Itinerary	Hotels	Activities	Logistics	Food
John Smith	Gold	April 10 – 20					
Jane Doe	Platinum	May 1 - 15					
Karen Ng	Gold	June 2 – 14					
Bob Zee	Platinum	July 10 – 20					
Mary Jacobs	Gold	July 15 – 29					

Managing the 5-Step Process: Tip #2

Be ruthless about email subject lines so that you can find information fast



Restaurant recs

Logistics

Activities

Accommodations

Overall itinerary

Payment

My recommendations

Welcome email w Qs

Initial request

Madeline Jhawar		Italy restaurants - Angela, Okay on to restaurant reco
Madeline Jhawar 2	~2018 Cli.../Tor and Shani	Italy pre-trip checklist - Tor &
Madeline, Angela 2	Inbox	Italy logistics - This is fantastic information. V
Angela, Madeline 5	Inbox	Fwd: Rome Private Tour - No reply from Aless
Madeline, Angela 10	Inbox	Italy guides & activities - We're all set with gui
Madeline, Angela 2	Inbox	Venice accommodations - We booked Corte d
Madeline, Angela 2	Inbox	Rome accommodations - We were able to use
Madeline, Angela 2	Inbox	Florence accommodation - Great options! We
Madeline, Angela 2	Inbox	Lake Como accommodations - I booked the fi
Madeline, Angela 2	Inbox	Italy itinerary - final - Itinerary looks good. Sen
Angela Leone via Pa.	Inbox	Payment received from alim06@aol.com - Ma
alim06, Madeline 4	Inbox	Payment - Got it, thanks very much! -- Madelin
Madeline, alim06 4		Welcome to Italy Travel Coaching - -----Original Messa
Angela Leone	Inbox	Leone Trip - Hi Madeline, We spoke a couple r
Madeline, alim06 7	Inbox	Welcome to Italy Travel coaching - Hi Madelin
Angela, Madeline 6	Inbox	~2018 Client requests Leone Italy Family Trip -

Managing the 5-Step Process: Tip #3



*Use checklists to
keep track of details*

Using Checklists

Each checklist should include the steps needed to complete the process.

June 10 - 14: Rome hotel Booking checklist

- ☐ Research hotel options
- ☐ Send hotel options to client
- ☐ Receive client feedback
- ☐ Send hotel request for booking
- ☐ Receive hotel quote
- ☐ Book hotel
- ☐ Enter confirmation into client itinerary



Using checklists

Checklists can be on paper, in a Google doc, or in a project management program like Basecamp, Trello, or Asana.

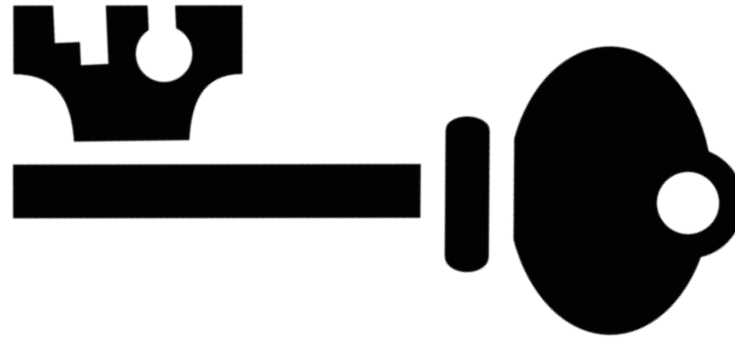
Trip Planning checklists:

- Logistics checklist (car rental, train, driver, taxi)
- Hotel booking checklist for each hotel
- Activity checklist for each activity
- Restaurant booking checklist per city

Overall project checklists:

- Admin checklist
- When-they-come-home checklist





Create a custom set of checklists for every trip. Note that a 2-week trip could easily have 30 checklists!

Managing the 5-Step Process: Tip #4

Add due dates to checklist items



Adding Due Dates

In order to manage a larger number of projects, I recommend adding due dates.

Determine due dates based on:

1. How much time you have to plan the trip
2. Your workload.

I recommend working backwards from the departure date.



Adding Due Dates

Example: Client contacts me Dec 1st

Client departs June 1st

May 15th: Final itinerary review call

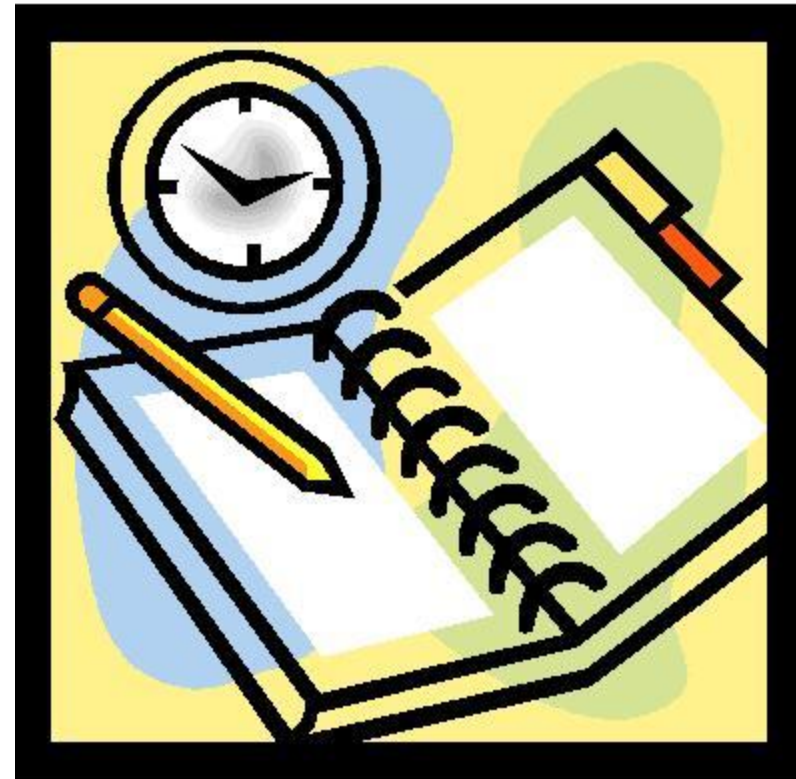
May 10th: Deadline to book restaurants

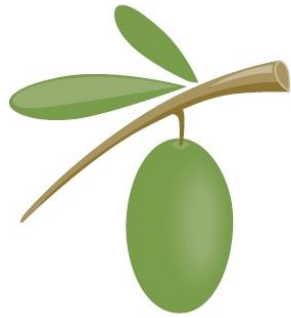
May 1st: Deadline to book logistics

Feb 1st: Deadline to book all activities

Jan 10th: Deadline to book all hotels

Dec 15th: Deadline to finalize overall itinerary





TRAVEL

Beyond The Obvious

The Five-Step Travel Planning Process

Madeline Jhawar