



# TRAVEL

Beyond The Obvious

## Tools to help run your business

Madeline Jhawar

# Tools to help you run your business

- Following up. How to never forget!
- Trip planning. How to make sure nothing falls through the cracks
- Client itinerary. Your product needs to be useful, complete, easy to read, and ideally pretty.
- Email list. How to build one.
- Invoices and expenses. How to keep track.
- Customer testimonials. Where to put them. How to get them.
- And more!

# How to never forget to follow up: Boomerang!



# Boomerang

← [Icons] Boomerang

Milan apartments > Inbox x ~ 2019 clients/Nie

**Madeline Jhwar** <madeline@italybeyondtheobvious.com>  
to Craig, Gigi ▾

Craig & Gigi,

For your final night in Italy, you'll stay in Milan, close to the airport

All of these places are close to Cadorna station, have 2 bedrooms and more.

[Dreams Hotel Residenza](#)  
2 bedroom apartment is \$300, non-refundable rate, although there

[Presigioso](#)  
This is \$250 and a refundable rate and is a bit bigger than the one

[Sacchi Deluxe](#)  
This is \$200 and the same size as Prestigioso. This would be about

Please let me know what you think.

Best,  
Madeline

...

Return Conversation to Inbox... ⚙️

if no reply     with a note

In 1 hour  
In 2 hours  
In 4 hours

Tomorrow morning  
Tomorrow afternoon

In 2 days  
In 4 days  
In 1 week  
In 2 weeks  
In 1 month

At a specific time:  
Examples: "Monday 9am", "Dec 23"

[Calendar Icon] **Confirm**

Random time ▾

before ▾ **Mar 31, 2019 8:00PM.** **Confirm**

train is only about 22 minutes to the airport -- airport trains do

end) and have 2 bathrooms. It's a great area, so you'll have lo

this is the closest to the train station, about a 5 minute walk.

station.

ably more with luggage.

# Examples of when I use Boomerang:

- For clients: after my “Thank you for contacting Italy Beyond the Obvious” email. Set to 1 week
- For clients: after the email I send with the agreement and invoice. Set to 1 week.
- For clients: after I send client questions. Set to 1 week.
- For clients: after I send hotel recs. Set to ~4 days.
- For anyone: after any email re scheduling a phone call
- For hotels: when they say they will pay commissions. Set to a month after the date they say they will pay
- For hotels: when I request a booking. Set to “tomorrow morning”.

# Boomerang for client follow-up: tips

- ✓ Boomerang a message as many times as you want. I usually follow up 3x. After no response I stop following up
- ✓ Use Boomerang to “send later”. Useful for weekends!
- ✓ No need for starred messages! Boomerang messages will appear back in your inbox.



Madeline .. Madeline .. 4

~ 2019 clients/Nieman

Boomerang-Returned

Milan apartments - Hi Ci

Cost: I pay \$50 / year for boomerang

# Trip Planning Tools



**Basecamp**



# Project Management Tool



# Basecamp

Treat each trip like a project. The tool should:

- ✓ Create projects
- ✓ Checklists
- ✓ Due dates
- ✓ Message board
- ✓ Calendar
- ✓ Documents

Cost: I use Basecamp and I pay \$49/month



# Trip Planning Tools: Basecamp ex

## 1906. Hannig, June 16 - 29 - Platinum






Add/remove people

### Message Board

-  **Hotels**  
Triple room On the Amalfi
-  **Initial request from Marcia**  
Rome, Amalfi Coast, Pompei or
-  **Initial phone call with Marcia**  
She is thinking Venice to
-  **Client Itinerary**  
Sat June 15 Depart US Sun June
-  **Travelers**  
Marcia Lynn Hannig Terri Shu

### To-dos

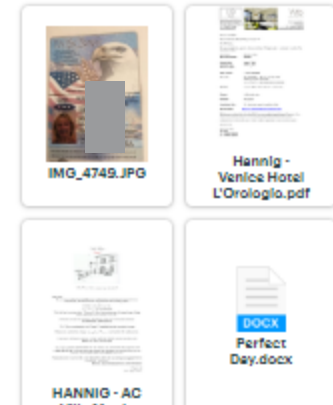
#### Project Management

- All hotels booked  Feb 5
- All guides and tours booked  Mar 8
- All logistics booked  May 10
- All restaurants booked  May 24

#### Sun June 16, Venice, Logistics & Transfers

- Review logistics options with client

### Docs & Files



Grid of files and documents:

- IMG\_4749.JPG
- Hannig - Venice Hotel L'Orologio.pdf
- HANNIG - AC 1811 - Mar 16
- DOCK Perfect Day.docx

# Client Itinerary: AxusTravelApp



# Axis example: itinerary



Monday · August 13th, 2018 - Saturday · August 25th, 2018

## Ginevan Family Trip to Italy

Itinerary for Kim, Doug, Sloane, Grayson, Maeve

[Contact Information for Madeline & Claudia](#)

Monday · August 13th

[Transfer · Cusi Firenze](#)

[Walk from the train station to tour meeting point: 10 minutes](#)

[Florence Overture Tour with Private Guide Suzanne \(3hr\)](#)

[Transfer · Cusi Florence](#)

[Rental Car · Europcar \(5 days\)](#)

[Azienda Agricola Il Borghetto \(5 nights\)](#)

[7 PM Dinner reservation at Il Borghetto](#)

# Axus example: itinerary, cont.

## Contact Information for Madeline & Claudia

Emergency numbers while in Italy:

Claudia Marchesi (9 am - 7 pm Italian time): +39 320 028 6827

Madeline (5 pm - 9 am Italian time): +1 773 621 3024

Monday · August 13th

TRANSFERS  
TOURS  
CRUISERS  
SHOPPING TOURS  
BUSINESS TRIPS  
TRANSPORT FOR  
WEDDINGS

**Cusi Florence**  
*Rent a car with Driver*

**Transfer · Cusi Firenze**  
Claudio +39 393 55 88 855 ; Daniele +39 346 57 01 439

9:30 AM

Departure

**Departing**  
Florence Airport

**Arriving**  
Florence SMN Train  
Station

**Passengers**  
5

### Notes

Your driver will meet you outside baggage claim and will take you to Florence Santa Maria Novella train station where you can store your luggage while you visit Florence this afternoon.

Your driver has your flight information and will wait if your flight is delayed.

# I highly recommend Axis!!

## Benefits of Axis:

- ✓ Pulls hotel descriptions, address, phone number from the web
- ✓ Allows you to create a library and pull in tours etc that you book often
- ✓ Add your logo – looks professional
- ✓ Has a client messaging functionality
- ✓ Clients get live updates when you make changes
- ✓ Clients LOVE the app!
- ✓ Everyone with a smartphone can see the itinerary

Costs \$240 / year. **If you invest in ONE tool, make it Axis.**

That said, see included FREE itinerary template.

# Axis example: back end

**PUBLISHED** ▼ i

## Ginevan Family Trip to Italy

Itinerary For:  
**Kim, Doug, Sloane, Grayson, Maeve**

Depart: **August 13th**  
Monday, 2018 → Return: **August 25th**  
Saturday, 2018

+ [Invite Colleague, DMC, or Tour Operator](#)

+ [Add Travelers](#) × 🗄 Kim Ginevan ⚙ × 🗄 Doug Ginevan ⚙

### Bookings

Pre Travel

⏷ [Contact Information for Madeline & Claudia](#) ⋮

Monday - August 13th

⏷ Depart at 9:30 AM [Transfer - Cusi Firenze](#) ⋮

⏷ [Walk from the train station to tour meeting point: 10 minutes](#) ⋮

⏷ Starts at 1:00 PM (3hr) [Florence Overture Tour with Private Guide Suzanne](#) ⋮

⏷ Depart at 4:00 PM [Transfer - Cusi Florence](#) ⋮

# Itinerary Template

**This is the header font**

---

**Date**  
Time This is the text

---

**Date**  
Time Text

---

**Your Logo Here** 1

**This is the header font**

---

<b>This is the font</b>	Example font
<b>Dinner</b>	Example font
<b>Driver</b>	Gianni
<b>Hotel</b>	Hotel
<b>Dinner</b>	Restaurant

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**Your Logo Here** 2

# How to Build your email list

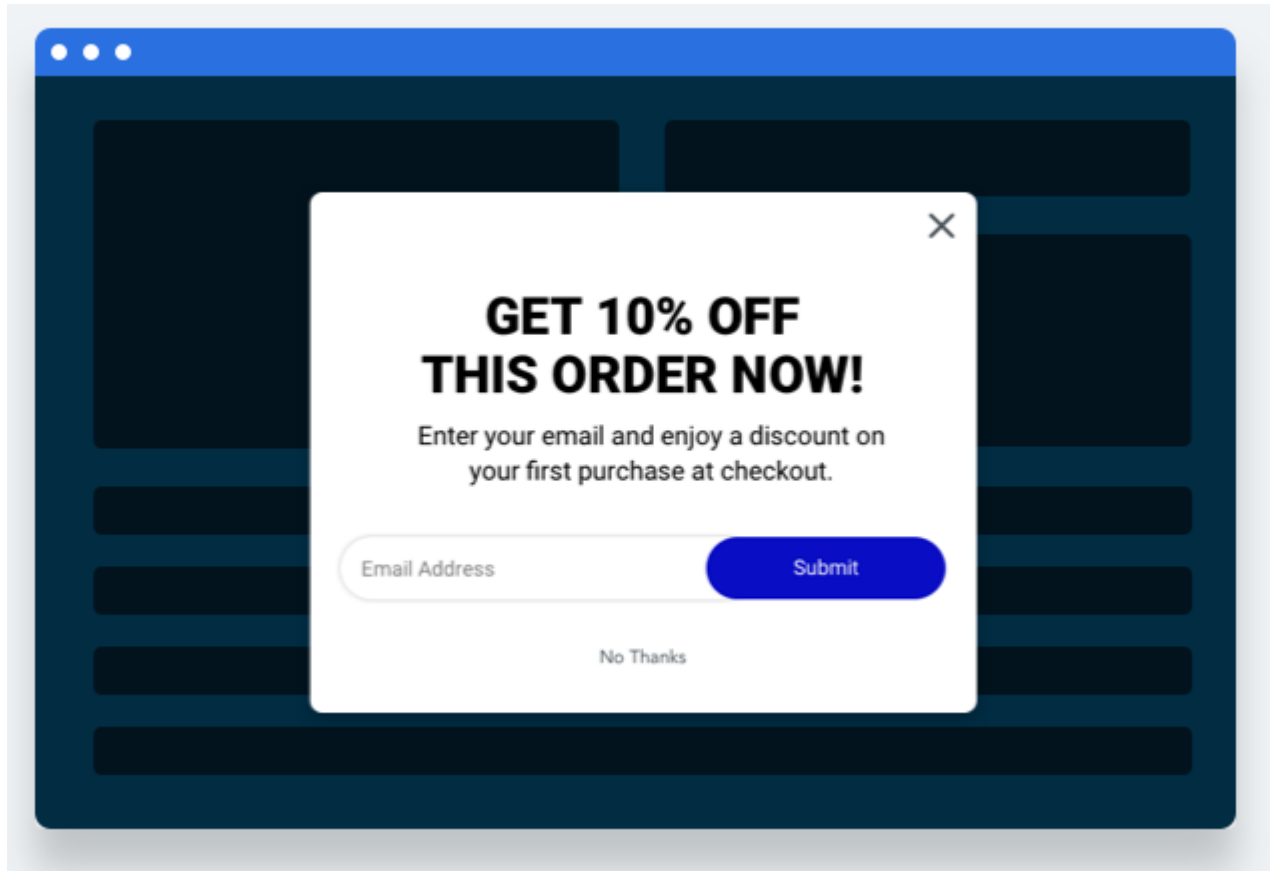


1. Sign up for Sumo (free trial)
2. Sign up for MailChimp (free until 2k subscribers)
3. Ideally create a free giveaway. Examples:
  - a. Ebook
  - b. Free 1-week Itinerary
  - c. 10 Travel Tips
4. Create Sumo pop-ups with your free giveaway
5. Create an email newsletter template
6. Put yourself on a monthly email newsletter schedule

Remember the wise words of Kevin Kelly in 1,000 True Fans (google it, read it). You don't need thousands of requests – you need only a few good ones!



# Use Sumo to grow your email list



# Invoicing & Expenses



I recommend Freshbooks or any program that:

- Easy to create invoices
- Send invoices directly to your client
- See when they've viewed the invoice
- Client can “click to pay” to make it easy
- Run reports
- Connect to your accountant

Cost: Freshbooks is about \$550 / year.

# Testimonials

Customer testimonials are important!!

Create a page on your website

Google My Business

Facebook page

Yelp (if you can)

Tripadvisor (if you can)



Google My Business



tripadvisor®

# Testimonials: Google My Business

**Your business on Google** 126 views Past 28 days

Italy Beyond the Obvious

ITALLY

Edit info Create post Add photo Reviews Create ad

Top things to do

- Promote your business with an ad on Google [GET STARTED](#)
- New photos [VIEW PHOTOS](#)
- You haven't posted recently. Tell customers about special events, promotions, or products. [CREATE POST](#)

Visible only to you [Feedback](#)

Save See photos

## Italy Beyond the Obvious

Website Save

5.0 ★★★★★ 7 Google reviews  
Travel agency in Menlo Park, California

**Address:** Menlo Park, CA 94025  
You visited 2 months ago

**Hours:** Open · Closes 6PM

**Phone:** (773) 621-3024

[Edit your business information](#)

[Add missing information](#)  
[Add appointment link](#)

# Testimonials: Facebook

The screenshot shows the Facebook profile of 'Italy Beyond the Obvious'. The profile picture features an olive branch and the text 'ITALY Beyond The Obvious'. The page has a 4.9 star rating based on 21 reviews. A notification banner states: 'Ratings and reviews have changed. We've made it easier for people to recommend your Page. Learn More'. A testimonial from Amy Roberts, dated January 30, reads: 'I lived in Italy and know it quite well. Her advice is spot on and I love reading her trip highlights.' Below the testimonial, a response from the page says: 'Italy Beyond the Obvious Thank you so much Amy! Like · Reply · Commented on by Madeline Jhawar [?] · 1m'. Another testimonial from Lauren Indomenico, dated January 31, reads: 'SOOO helpful!! We travelled to Taormina, Sorrento, and a quick stop in Pompeii on our way to Rome with 3 children. Madeline was unbelievably helpful in making the experience kid appropriate and the transitions between cities seamless. We enjoyed...'. The page also includes navigation links (Home, Services, Reviews, Shop, Offers, Photos, Videos, Posts, Events, About, Community) and interaction buttons (Like, Following, Share, Send Message).

# Steps to asking a customer for a review

1. “Welcome home! How did your trip go?”
  2. After they respond with details...
  3. “I’m so happy you had a great trip! I’d love a review from you here [hyperlink] or here [hyperlink].  
Reviews are huge for small businesses like mine.”
  4. Follow up in a month if they haven’t left a review  
(Boomerang!)
- I ask every single client for a review and probably 20% of them leave one.

# More Useful tools!

## Canva

Free and easy graphic design. Use it for Facebook headers, posters, pamphlets, ebooks, thank you cards, blog posts and more



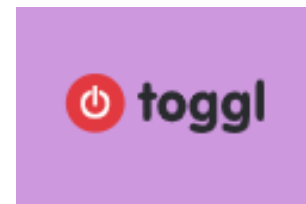
## Zoom

Free video conference calls, and what I'm using to record this course!



## Toggl

Free time-tracking software



# More Useful tools!

FreeConferenceCall.com



For talking to clients in different places

## Pomodoro Technique

Set a timer for 25 minutes; 10 min break; 5 min break



**25:00**







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