TRAVEL

Beyond The Obvious

Overview: the full customer process

Madeline Jhawar, Italy Beyond the Obvious

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 working on your Little Black Book of recommendations

- ✓ 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, and sent you a deposit.

A. Create the Customer Project

❑ Create an email folder so you can easily file and find all communication with the customer

❑ Create a file on your computer for the trip where you'll store all documents related to this trip

❑ Create the customer project in your planning tools (Basecamp or other) to include

  ❑ Documents area where everyone working on the project can access all documents associated with the trip

  ❑ Messages area where you add all information about the customer's preferences, budget, etc

  ❑ Checklists, where you'll eventually keep track of all planning details

B. Send Initial Questions

❑ Send these to the customer along with the invoice and agreement

❑ Add all customer responses to the customer project

❑ Refer back to these questions at every stage of the planning

Initial Customer Questions (recap)

1. How did this destination win the jackpot?
2. Please describe an ideal day as you imagine it on this trip.
3. Describe your previous travel experience.
4. Accommodations
5. Transportation
6. Food
7. Please send names of all travelers, ages of children, and the best cell phone number where you can be reached while traveling
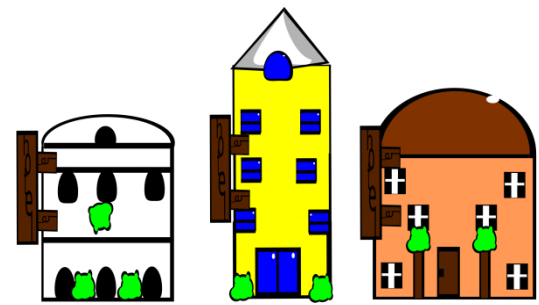
C. Create the Overall Itinerary

Focus on Step 1 of the 5-step travel planning process

❑ Review customer feedback and send customer your recommendations

❑ Customer gives feedback

❑ Create a draft itinerary

❑ Customer gives feedback

❑ Finalize the itinerary

❑ Customer books flights, you need exact dates

D. Accommodations

Accommodations (step 2 of 5-step planning process)

- ❑ Review customer accommodation preferences

- ❑ Make sure you have exact dates, budget, confirmed travelers, all preferences

- ❑ Research in booking.com and send options

- ❑ Customer picks accommodation
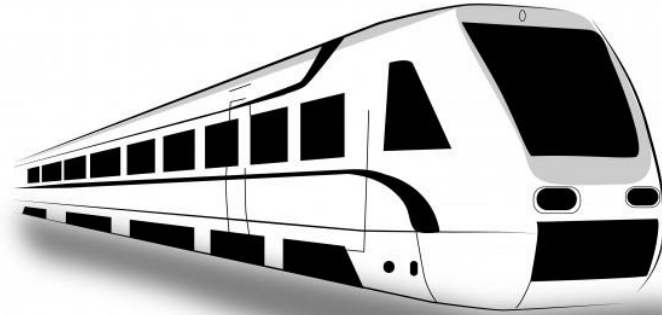
- ❑ You book, add details to customer itinerary

E. Tours & Activities

Focus on Step 3 of the 5-step travel planning process

❑Review customer interests and perfect day info

❑Send tours and activities you'd recommend

❑Send the customer links to a few options – small group tour, private tour, headset, DIY etc

❑Customer picks, you book and add details to itinerary

F. Logistics

Focus on Step 4 of the 5-step travel planning process

❑ Review customer preferences (car vs train, budget..)

❑ Ask additional questions (stick shift vs automatic, luggage, 1st vs 2nd class train etc)

❑ Book airport transfers, drivers, train tickets, rental cars, ferry tickets etc. and add details to itinerary

G. Food

Focus on Step 5 of the 5-step travel planning process

❑Review customer preferences (allergies, vegetarian..)

❑Check whether customer has restaurant requests

❑Pull up recs from your bookmarks, or from
   Tripadvisor / Chowhound / Yelp etc.

❑Check logistics (distance from hotel, parking etc)

❑Book restaurants and add details to itinerary

H. Pre-trip preparation
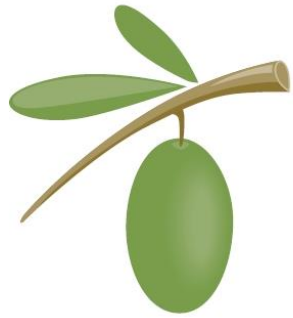
❑ Schedule final itinerary review call with customer

❑ Send customer pre-trip checklist about money, technology, packing, tipping, and other tips you have

❑ Send customer final invoice for planning services

I. Post-Trip

❑ Send "welcome home" email

❑ Ask customer for feedback

❑ Ask customer for review if the feedback is good

❑ If final invoice has been paid, delete customer credit card information

❑ Follow up on commissions, if relevant

❑ Send customer holiday card

Happy Holidays

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