

Client Management Roadmap

1. CAPTURE ADD ALL LEADS TO YOUR DATABASE

One of the biggest mistakes I see when I consult with big agencies is a lack of diligence in collecting and keeping prospective client information. This is critical for future marketing, re-targeting, and growing your base. Even if a lead doesn't book with you, every lead should be entered into your database.

In marketing there is a concept called "The Rule of 7" that states a client needs to see you or your brand seven (7) times before they will actually book with you. This is why collecting this information is so valuable. Leads just don't close easily on an initial contact. You must foster a relationship and get leads familiar with your brand. In the marketing world we call this list building, and it's the GOLDMINE you are building for your new business

2. QUALIFY PRESCREEN POTENTIAL CLIENTS

Let's face it...not everyone is an ideal client. Sometimes clients have unrealistic expectations, or their budget may not match their 5-star expectations, or they are only interested in bargain basement vacations. High end, top producing agencies screen these types of leads out. It may seem counter intuitive, but trying to please these types of clients can be very time-consuming, result in a lot of stress and hours of work with little or no commission to show for it. That is valuable time you could be spending marketing to high end clients. So, how do you qualify your clients?

At a minimum, you should ask these questions:

- Where/When would you like to go?
- How many people?
- What is your budget for this vacation?
- Do you prefer 4 or 5-star type resorts?
- Travel inventory changes daily. When we find something that meets your budget, are you ready to place your deposit to secure the vacation

Just with these few simple questions, you will be able to establish if your clients are ready to actually book, and if their target budget is on track for the type of vacation they want. If the answers are not favorable, you can redirect the client or set expectations, rather than spend hours researching just to find out they were not ready to book. Unless you charge a planning fee, travel advisors work on 100% commission, so your time is extremely valuable and screening out tire kickers is key.

3. QUOTE PREPARE AND DELIVER THE QUOTE

If you have successfully screened your lead, you are ready to start researching their trip. Use the suppliers' booking systems to research and prepare your quotes. Schedule a time to review the quotes with your client via video.

Tip: Avoid sending quotes to new clients via email, it creates less opportunity to close the sale. Worse yet, you don't want them to take your quote and go book it themselves.

4. ADVISE VERIFY AND COMMUNICATE TRAVEL REQUIREMENTS

Verify and advise your clients on what requirements are necessary for the trip. Will they need a passport, any vaccinations, or visas? Always confirm directly with the travel supplier and note in your CRM.

Important: If there is anyone in a travel party with a felony, they need to verify entry requirements for the country, as some may require a visa or be prohibited from traveling to certain countries. Countries that require travel visas may ask for your client's criminal record on the application form. They may also conduct a criminal background check during the approval process. Several countries will deny you entry based on this information. Make sure you inform your travelers to do this well in advance of travel.

5. SELL - CLOSE THE SALE!

A lot of advisors do all the work required, prepare a beautiful quote but then choke when it comes to closing the deal.

ALWAYS ask for the sale! After presenting the quotes, experiment with these closing lines:

- "Which one of these options works best for you"
- "Which CC do you want to use for your deposit?"
- "Space is limited, so I am glad we are securing your booking today. What is the legal spelling of your name for your booking?"

Do this WITHOUT hesitation, on every quote you present.

6. MONITOR OVERSEE AND MONITOR TRAVEL PLANS

It's a good idea to keep an eye on travel news, weather, and anything that may impact your client's vacation. For example, if a hurricane is on the horizon and your clients are heading to Florida, simply letting them know you are monitoring their plans will go a long way with them. Communicate with your clients and keep them posted on updates.

7. SERVICE BON VOYAGE TOUCHPOINT

Travel advisors are known for delivering a little something extra, that special customer service that has gone by the wayside in the age of the internet. This is a wonderful opportunity for you to stand out and build a solid relationship with your client so they will come back to you year after year.

In addition to doing a great job booking, and communicating with your clients, exceptional advisors usually send a personal card, travel themed gift, or a surprise to “WOW” their clients. We send a “Bon Voyage” card along with a nice gift. Now with that said, you don’t have to spend a lot. Make your gift relative to the commission. For example, a \$40K Safari may be a nice gift basket, but for a weekend in Vegas maybe a \$12 Travel guide and personal card. You could also send a nice email wishing them well on their vacation.

Tip: SWT has customizable itineraries, packing lists, and other tools to give your clients inside TERN. Add them to your service funnel or bon voyage paperwork as amazing added value pieces that will enhance their experience and make you look like a skilled and professional travel advisor.

8. SATISFACTION WELCOME HOME TOUCHPOINT

Just like the exceptional service during the bon voyage period, you want to continue to build the relationship by asking the clients how they enjoyed their vacation. This will show your clients you care and will give you a good idea of if they were satisfied or if any follow-up customer service may be needed. This can be a simple email or a personal phone call. Be sure to note client preferences and feedback in your system for future reference.

Tip: TERN will have a dashboard so you can see what vacations are coming up and who is returning from travel. Create a standard template to wish them “Bon Voyage” and “Welcome Home” and send it out a few days before travel. Go to Library in TERN, shared with me, this is where you can see all the premade emails and templates for you to use.

9. SHARE

When your clients have an amazing time, solicit an online review for your business. This is one of the best things you can do to build your online reputation, and it doesn’t cost you anything! It’s the best free marketing out there.

Tip: Encourage your clients to tag you in posts while they are on their vacation, that way you can “share” them on your own social media to promote the successful work you have done! People will see the fun your clients are having and want to join.

10. CONVERT

Although you booked one vacation for a client, there is no guarantee they will be back. This is the time to ask them where they are thinking about for their next vacation and offer to monitor the specials and keep them posted. They will love that level of service, and you just scored yourself another future sale. It's a win-win!

Tip: Check out our printable “Client Management Roadmap” in your resources. Post it in your office for quick reference as you learn to work through this process with each new client