

1 Where & Why??

The main thing you want to find out is – Where are they going and Why are they going on this vacation, trip or cruise, Special Occasion?

If you know why they are traveling, You can book more events and activities and make more commissions.

2 Who will be traveling and how many?

Do we have infants? Children? Seniors? You will need birth dates and ages of each traveler.

3 When?

When are they going on the Trip? Make sure you have the correct dates of travel. See if these dates are flexible because prices can vary from day to day. Ask the client for a 3-day window if they want to save money. An example would be, if they want to travel June 15th as the date of travel, ask if June 16th, 17th or 18th are flexible and fit with their plans. You may save them substantial money by booking them on alternate dates. Discuss the weather of their destination for the time of year they wish to travel. Do you book Las Vegas in August? Do you book Orlando in July? Do you book Caribbean cruises in September? You want to accommodate your clients, but they need to be aware of weather conditions.

4 Budget for the vacation

Ask your client for a budget as this will help assist you in the research of the trip, vacation or cruise, and ensure that you are offering the most affordable accommodations that fit their budget.

Here's an idea of a budget review:

Low Cost	Moderate	Luxury
less than \$1500 per person per trip	\$1500-\$7500 per person per trip	Over \$7500 per person per trip

5 Review

Review the itinerary with your client. Here is an example: "Ok, Mr. and Mrs. Client, just to review, you would like to go on a Royal Caribbean International Eastern Caribbean cruise June 5th through June 12th and you want to fly out of LAX because you have Delta mileage points, correct? No problem - I can research that and send a recommendation to you via email with pricing and options." Review everything before you start your research.

6 Are they working with another Travel Agency or are they doing research online?

If so, where, and how much have they been quoted? We can either meet or beat that price from the travel resources we have.

7 Does anyone qualify for Senior Discounts or, Military, First Responders?

Gather this information and use it when filling out your travel quotes with suppliers and vendors.

8 Are the passports and photo ID up to date?

Passports must be valid for 6 months after the final day of their travel.

9 Accommodations

What kind of hotel does your client want? 5 Star, 4 Star, 3 Star? All-inclusive resort? Do they want breakfast included in their hotel stay? Inquire about accommodations when you're interviewing your client.

10 Airport Transfers or Car Rental

Talk to your client about transfers and car rental. Does their hotel destination offer a shuttle service.

11 Travel Insurance

Ask your clients if they need Travel Insurance. It's a good thing for your clients to have.

12 Activities to Experience

Ask your clients if there are activities, tours and events, or things that they want to experience while they're on vacation... ask your clients the following questions in regards to cruises.

1 Any cruising experience?

3 Cabin Type?

2 Cruise Line Preference?

4 Dining Preference?