Cruise Client Qualification Checklist

- [ ] 1. Where & Why?
    - A. Determine the destination and purpose of the trip. Special occasion? Leisure?
    - B. Knowing why they're traveling helps you suggest activities and events to earn more commissions.
- [ ] 2. Who's Traveling?
    - A. Get the number of travelers and their ages (infants, children, seniors).
    - B. Collect birth dates for each traveler.
- [ ] 3. Review the Itinerary
    - A. Confirm dates, cruise line, destination, and any preferences (e.g., flight options, loyalty programs).
    - B. Example: "You want to go on a Royal Caribbean Eastern Caribbean cruise from June 5th to June 12th, flying out of LAX with Delta miles, correct?"
- [ ] 4. When?
    - A. Get the travel dates. Are they flexible? A 3-day window can help save on costs.
    - B. Discuss weather conditions for the destination and season.
    - C. (e.g., Do they want a Caribbean cruise during hurricane season or are they open to other options?)
- [ ] 5. How Long?
    - A. How many nights would they like the cruise to be?
    - B. (Short 3-4 night getaway or a longer 7+ night journey?)
- [ ] 6. Budget
    - A. Ask for a budget to tailor the vacation or cruise.
    - B. Ensure you're offering options within their price range.
- [ ] 7. Cabin Type
    - A. Ask what type of cabin they prefer: Inside, Oceanview, Balcony, or Suite.
- [ ] 8. Cruise Extras
    - A. Would they like to pre-purchase excursions, drink packages, or special dining experiences?
    - B. These can enhance the trip and increase your commissions.

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- [ ] 9. Activities to Experience
    - A. Ask if they have any specific activities or tours they'd like.
    - B. Cruising Experience? First-timers or regulars?
    - C. Dining Preferences? Early, late, or flexible dining?
- [ ] 10. Accommodations
    - A. What type of hotel or resort do they prefer before or after the cruise? 1-5-star, all-inclusive, etc.
    - B. Ask if they want breakfast included or specific amenities they prefer.
- [ ] 11. Airport Transfers or Car Rental
    - A. Check if they need transfers or a car rental.
    - B. Does the hotel offer a shuttle service?
- [ ] 12. Travel Insurance
    - A. Recommend travel insurance to ensure protection during their trip.
- [ ] 13. Passports & ID
    - A. Ensure all passports are valid for 6 months beyond the travel date.
- [ ] 14. Other Agents or Online Research?
    - A. Ask if they've worked with other agencies or done online research.
    - B. Explain what you offer as a travel agent (concierge service).
    - C. Note: (Travel Agents: You do not need to accept every client. You need to qualify and make sure they are the right fit for your business. You can add a service fee for quoting travel if you'd like as well).
- [ ] 15. Discounts
    - A. Do they qualify for any Senior, Military, or First Responder discounts?
    - B. Are they a part of the loyalty program with the cruise line, airline, hotel, etc.?
    - C. Use this information when obtaining quotes.

Once you've gathered all this information, follow the steps to the sale to close the deal and complete the booking with your client!