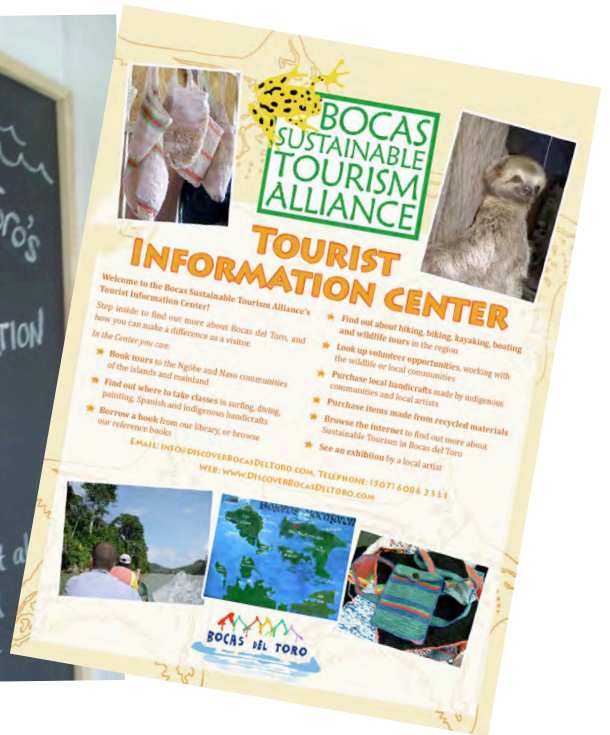




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USAID CONSERVATION OF CENTRAL AMERICAN WATERSHEDS PROGRAM

DELIVERABLE #6: CUSTOMER SERVICE TRAINING FOR BOCAS SUSTAINABLE TOURISM ALLIANCE (BSTA) INFORMATION CENTER STAFF SUBCONTRACT #EPP-I-04-03-00014-03

SEPTEMBER 2009

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CUSTOMER SERVICE TRAINING FOR BSTA INFORMATION CENTER STAFF

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Appendix 1: Customer Service Training Manual

SECTION 1. MINUTES DOCUMENTING CUSTOMER SERVICE TRAINING SESSIONS

1.1 Session #1: Friday, August 28, 2009

Subject: Information Center situation at a glance

Location: Training was conducted via Skype

Attendees: Ana Maria Baldiodeda (trainer) and Catherine Monahan (BSTA Office Manager)

Summary

Because the Information Center is not really functioning as a travel agency at this time and it is uncertain when this would happen, I asked Catta to give me an overview of what her daily activities were at the moment as well as the Information Center's current situation. Our discussion was based on ways to better structure her day-to-day activities at the office. At the same time, I addressed the need to create a system to be able to track the Center's productivity to be able to show results for members as well as potential members.

Information Center's current situation

1. Most visitors don't want to book a tour in advance due to unpredictable weather.
2. Most visitors already have hotel reservations; those who don't are usually backpackers who need hostel type accommodations. These clients usually need a place to stay for the same night they show at the Center. The indigenous hostel they have as member right now requires at least a day's notice to prepare the community, lodging, food, etc. The Center needs more hostel-type lodging to become Alliance members.

Feedback: Once the website is done, more and more travelers will be booking hostels and community type lodging in advance, thus being able to give communities the needed notice.

3. **Visitors/ Walk-ins:** Catta has a hard time keeping up with a number of visitors who show up at the Center all at once (up to 10 people sometimes). Most of these people simply want information and have tons of questions. She spends approximately 25 minutes on a visitor who is simply looking for information because an information book is not yet completed.

Feedback: Catta has been busy with various responsibilities up until now, but it is definitely key to complete a Frequently Asked Questions reference book that contains detailed information about the area. Catta would then point people towards this resource (they should keep several copies) and would politely point out that she would be happy to

assist them once they are ready to make a reservation. The idea is for Catta to try to “eye out” visitors and invest her time on actual “buyers”; otherwise, she will just be repeating the same answers to backpackers who are really not going to book through the Center.

- 4. Tour Reservations:** 50% of the visitors want to go on a snorkeling tour or other day tour. Catta is currently sending them over to a botero but she is unable to get anyone to answer the phone to make a reservation for them or ask whether they can take the client, etc. She ends up not knowing whether the referral was able to go on a tour or what.

Feedback: The Center needs to put in place a system that is able to track those clients they refer over to any tour operator. For example, Catta would get the clients’ names, how many people would go on the tour, possibly hotel where they are staying or any other reference detail. She should make every attempt to get people to decide on a time for their tour and actually send in a reservation (phone call, email or fax) to the botero or tour operator.

For this to work, she would need to first meet with each provider individually to set up a reservations system that would work best for each vendor depending on their policies and logistics. The issue with the Boteros training will be addressed during the training in October.

- 5. Hotel Reservations:** Catta hasn’t yet had anyone asking her to make a hotel reservation (for those hotels who are Alliance members). What would happen when someone asked to make a reservation for them?

Feedback: Again, the idea is for the Information Center to be able to start keeping tabs on the business they are generating for their members. I suggested she apply the following procedure when making reservations with a hotel right now:

1. Set up a reservations procedure with each hotel in advance. This entails knowing what each hotel’s cancellation policy is, what their no-show charge would be, etc. How they prefer receiving and answering reservations (via e-mail, fax, etc.).
2. Call the hotel to verify space (while the client is still there at the information center).
3. The Information Center would have the client fill out a Reservations Form where they supply their credit card information to guarantee the reservation. The client needs to be aware of the fact that this is a reservation and that the hotel would in fact charge their credit card based on their cancellation policy. The form needs to include a short paragraph explaining the credit card would only be used **by the hotel** to charge a penalty fee in cases that merit it (according to hotel’s

cancellation policy). The client is otherwise paying the hotel directly once they arrive at the hotel.

4. The Information Center would send in a Hotel Reservation Form (taken from the Training Manual) and would ensure the hotel confirms and guarantees the reservation before the client arrives.

6. **Restaurant referrals:** Catta is currently sending over lots of people to the area's restaurants as well as the one Coffee Shop who is an alliance member. Would there be a way to keep track of these referrals?

Feedback: We obviously can't request a credit card to make a restaurant reservation, but we may try to get the client to zero in on a reservation time for her to call the Restaurant and make a reservation for them. We discussed coming up with a small *Referral Card* she could give out to each client, for them to turn it in at the restaurant when they arrive. This way the restaurant would be able to collect them (and re-use them of course!) and Catta could pick them up each week or so to keep track of the amount of clients she sends over. The Information Center could begin charging a small commission fee for all referrals made using this system.

General Recommendations / Follow-up Activities

- ✓ It is essential to begin keeping track of the actual sales or referrals she is able to generate for each of the members now. While it is important for her to continue attracting new members, a system to capture reservations needs to be in place with the current members. This will help Catta "sell" the Alliance to new businesses by showing actual figures and discussing reservations procedures that have or have not worked out well with other members.
- ✓ Catta will meet with current members to work out a Reservations system with each of them that best adheres to their logistics and policies. She will then begin sending out a written reservation and obtaining confirmation for each person she sends over. In addition, she will be requesting visitors who are serious about booking a tour or hotel reservation to fill out a Reservation Form which would ask them for their credit card details to have as collateral.
- ✓ Marlon/ Sunday coverage:
It is hard for Catta to oversee what Marlon does during his Sunday shift since they really have no contact throughout the week (other than notes or messages). In my opinion, Catta should be his supervisor in order to set specific responsibilities for him and come up with tasks he needs to complete from week to week. I suggested she come up with a list of tasks as well as an office report for him to fill out every Sunday, to let her know what went on in the office that day.

The fact that he is well connected in the local community needs to be taken advantage of. He should be key in getting the boteros to provide the Information Center with information as to which of the people they referred over actually purchased a tour that week and so forth.

- ✓ Catta and I will meet again as soon as her USAID and Rainforest Alliance activities are through this week and she is able to focus on my recommendations. Her comments were that it was very helpful to obtain feedback and suggestions from me; this gave her a good sense of the direction she should be taking with the Information Center's current situation.

1.2 Session #2: Wednesday, September 9, 2009

Time: 4:00 - 7:00pm

Location: BSTA Office, Isla Colon, Bocas del Toro

Attendees: Ana Maria Baldioceda (trainer) and Cathleen Monahan (BSTA Office Manager)

I. Office Set-up & Visitor interaction

- Observation on Catta's interaction with walk-in visitors, information available at the office, the information she offers and how she currently tries to send business over to the alliance's members.
- Recommendations on how to address visitors who are only looking for general information such as public bus schedules, driving times, etc. (i.e. are not looking to purchase anything), and those interested in booking a tour or hotel or recommendations on where to eat.
 1. Put up a corkboard with a Visitor Log at the office entrance, inviting all walk-ins to please sign in when they come in. This way Catta is able to track the amount of visitors we had each day and have their contact details in case it's needed later on (Name, Hotel name, e-mail, Product Interest). This also stalls visitors while Catta is busy with someone else when others come in.
 2. Create a FAQ Sheet (Frequently Asked Questions) for visitors to read on their own in case they are simply looking for "free information". Catta would politely indicate to such travelers to feel free to look through the FAQ sheet for general information about the destination; if they are interested in making reservations through any of the listed suppliers, she would be happy to help them further. This way Catta is able to spend time with visitors who actually represent a potential sale.

3. Re-arrange member information folders (Hotels, Tours, Activities) at the office entrance to keep clutter and traffic away from “visiting area”.

II. Reservations Procedure with tour operators/hotels/members:

1. What is each member’s Individual booking procedure?

This needs to be understood before sending them reservations. Share with them how the Information Center plans on sending out reservations and agree on a method that works best for both.

- Print out reservation form sheets to be filled out for all walk-in reservations. File these away under each Supplier’s file folder.
- Send these out to Supplier or call in the reservation, making sure you obtain information on the name of the person who confirmed the reservation.

2. Keeping track of confirmed Reservations / Referrals:

- Call back Supplier to see whether prospective client booked and obtain additional information on the “sale”. For example, how many people signed up for the tour, how many room nights were booked at the hotel, etc.
- Log in each reservation in a Reservations worksheet (Sales Monthly Report Template document was suggested for Catta to adapt to her needs). This will allow the BSTA to generate a production report for each member at the end of a period or year, as well as study the Information Center’s progress and growth.

3. Create a filing system:

- Create a folder file for each BSTA member that includes their membership contract, supplier’s conditions/Contact details/Payment & Cancellation Policies. Bookings may be filed away by Supplier to be able to come up with a production report for each member at the end of a certain period.

1.3 Session #3: Thursday, September 10, 2009

Time: 9:00am-1:00pm / 4:00-6:00pm

Location: BSTA Office

Attendees: Ana Maria Baldiaceda (trainer) and Cathleen Monahan (BSTA Office Manager)

I. Adapting reservation forms to BSTA office’s needs:

- a. Prepared reservation/booking forms: one for Hotels and one for Tour Operators that include complete client info, booking commitment and client signature.

- b. Adapt E-mail inquiry template to BSTA office to be used as soon as website is up and starts generating e-mail requests.
- c. Begin utilizing Sales Tracking Sheet worksheet to record all bookings and be able to generate a production report for the office as well as for each member.
- d. Went through Monthly Report Template and its different tabs and explained how this should be used once the office starts producing reservations to report on all of the Information Center's monthly activities.

II. Continued to work on visitor interaction and suggestions for each case...

- Recommendations on how to improve communication with Marlon (Sunday coverage) to have a better flow of client leads once Catta is back in the office.
- Make sure Marlon fills out client tracking sheet to be aware of clients' requests in case they come back when Catta is there. Try to establish a communication method that works to ensure he is giving out correct information to clients and is able to use Reservation Forms, process reservations, etc.
- Come up with a general Membership Contact list to keep handy. This will be used over and over again as business starts picking up to check availability and remember what products and services we should be offering.

III. Boteros membership:

- a. Why it makes sense to offer Boteros individual membership?

We went through the reasons it is important to train boteros on customer service standards.

- To try to raise the level of the transportation service they currently offer
- To educate Boteros on the sustainability subject (such as respecting speed limits)
- To have a trustworthy network of water transportation providers the Information Center can recommend to our clients

- b. Met with Boteros Unidos's President to discuss how they operate in general and what we would like to observe on the inspection trip.

1.4 Session #4: September 13, 2009

Short meeting with Marlon (Sunday coverage)

Time: 9:40am-10:15am

Location: BSTA Office

Attendees: Ana Maria Baldioceda (trainer) and Marlon Smith (BSTA Office Staff)

- Emphasized the importance of improving communication lines with Catta throughout the week, as well as the need for making reservations, not only offering information to clients;
- Sales Tracking Worksheet: explained the need for this and its use; Catta to let him know where the document is located in the office computer for him to update when he comes in.
- Membership files: where they are, what they should include
- Using Reservation forms
- Asking clients to sign on the visitor log when they enter the office

Tour & Travel Customer Service:

A Manual for Training
Travel Consultants & Sales Representatives

July, 2009

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Foreword to the DMC Sales and Reservations Coordinator

The following manual contains practical guidelines and procedures intended to help you become an exceptional travel planner. Nonetheless, it takes a bit more than theory to build **customer loyalty** and create long-lasting relationships – much needed elements in turning a business opportunity into a truly profitable one. A Sales representative may typically obtain a small share of the business, simply by being knowledgeable and showing a professional demeanor; yet, your aim should be to try to convert every lead that comes your way.

So how do we become a client's friend and gain their **loyalty**? It is a process achieved over time, as one starts learning all about different client types and how to effectively communicate with each of these types.

Here are 7 Traits that will help you achieve Customer Loyalty:

- Positive and Energetic attitude
- Empathy- *See Synonyms: understanding, sympathy*
- Great listening skills
- Honesty at all times
- Outgoing personality
- Patience... lots of it!
- Self-confidence

Job Description

The DMC Sales and Reservations Coordinator will play a key role in the coordination of sales and promotion for the sustainable tourism cluster. His/her responsibilities will include (but are not limited to) the following:

- Provide information to tourists on the environmental and cultural assets of Bocas del Toro (or destination) as well as the tours and accommodations available on the island;
- Facilitate the booking of lodgings and activities for tourists;
- Manage and update the Destination Management Organization's website portal and manage online booking requests of hotels and activities;
- Manage the order and sales of local products as well as the branded merchandise;
- Promote the membership program among tourism stakeholders and ensure the collection of both membership fees and commissions; and
- Manage visitor surveys to collect market research.

SECTION I: Understanding Client Sources

Learning Objective:

After this session, student will be able to identify the different sources sales leads may derive from and how these may result in a sale or booking.

The DMC / Geotourism office may capture its booking leads or sales opportunities through eight main sources enumerated below. These sources will possibly expand as the office is consolidated and its marketing efforts increase. It is important to understand how to best treat each of these client prospects focusing on their specific needs.

In our tough economic times, we can't afford to overlook a business prospect or get too picky about who we want as our customer. Often times, your first encounter with one – whether it is in person, via e-mail or telephone – will define whether the client decides to give you their business or not. Therefore, **first impressions DO count when it comes to customer service!**

The 8 Sources of Client Leads:

- “Walk-ins”
- Internet requests and Online generated leads
- Skype Calls and Online Chat
- Phone Enquiries
- Repeat Clients
- Client Referrals
- Local Business Referrals and *Word of Mouth*
- Tour & Travel Trade shows

1. “Walk-ins”

Visitors who physically show up at the office are referred to as “walk-ins”. Such visitors may either be looking for general information about the destination or purchase one or more travel services such as day tours, transportation or lodging. Visitors could either be local or foreign tourists. Although in many cases walk-ins are only looking for “free advise”, we should take advantage of this opportunity to offer our services and lure them into booking directly through the office.



Heads-up: Walk-in clients are an immediate sales opportunity because they have arrived at the destination and are right there in front of us! This means they will visit certain areas or book a determined tour whether they do it through you or another provider. Put your friendly cap on, build a relationship and close the sale!

2. Internet requests and Online generated leads

More and more travelers are turning to the internet as a resource when it comes to planning their next vacation or business trip or simply learning more about the destination they would like to visit. For this reason, we should make an effort to



constantly review the content displayed on our travel website; otherwise, we will quickly lose a return visitor as well as potential sales.

Web visitors will be able to fill out a request form which will be re-directed to the Office Coordinator's e-mail. This request form contains specific information about the client's travel preferences and general profile. With this form, the Coordinator will be able to reply to such request via e-mail (Section IV details the Operational steps to reply to e-mail requests).

Website quick maintenance checklist (must be done at least quarterly):

- ✓ All offered service descriptions are detailed and accurate (Including lodging, transportation and tour options).
- ✓ All information is up-to-date (i.e. a tour is still operating, pricing is up-to-date, promotions/discounts are still valid, etc.) *Tip: Whenever we don't have an updated price available, it is best to offer a price range instead.*
- ✓ The listed information is clear and concise
- ✓ The site easily guides customers through a simple selection and booking process
- ✓ The site invites and leads visitors towards purchasing a service or contacting our office directly for further information.

First impressions count!

As is the case with a Walk-in client, how we respond to the initial internet request may either lure the client to continue interested in giving us their business, or turn them towards the competition. Very often, a client will send the same request to various other travel providers, so the competition is on at all times!

Clients come in different colors and shapes...



For the most part, people who fill out a request form to travel overseas are either seeking advise about the destination or want someone to help them plan their vacation. Yet, they often contact a tour provider without understanding what you as a travel planner are able to do for them. This said it is important to keep in mind that clients might contact you for different reasons and have different expectations.

Client Demographics

Clients may be grouped into several demographic categories to obtain a more clear profile about a travel opportunity; this also allows us to direct our marketing efforts towards specific segments.

Consider some common demographic segmentations in relationship to the international travel market:

Adventure travelers



- ✚ People looking for high thrill activities such as: whitewater rafting, scuba diving, mountain biking, tree climbing or zip lining.
- ✚ More likely to be young, single and employed
- ✚ Will usually plan part of their travel itinerary ahead with the help of a Travel Agency

Baby boomers

- ✚ Households headed by someone age 35-54 with moderate to high incomes
- ✚ Typically look for nice, luxury accommodations
- ✚ Interested in sustainable travel and Geotourism (preference for culturally and socially related travel)
- ✚ Will usually plan their travel itinerary ahead with the help of a Travel Agency
- ✚ Will travel with and without the rest of their family



Backpackers

- ✚ Usually travel on their own or accompanied by a couple of friends with little more than a *backpack* – hence the name
- ✚ Low -budget travelers
- ✚ No pre-arranged reservations or specific travel itinerary
- ✚ Typically stay for longer periods of time (10 days or more)
- ✚ Might go to a Travel Agency only for information



Educational Travel



- ✚ Elementary, High School or College level group travel abroad programs
- ✚ Focused on specific teaching objectives, such as conservation, history, teamwork, cultural studies and sports
- ✚ Will organize a very detailed trip package through a Travel Planner
- ✚ Low to high-end budget range
- ✚ Schedule yearly travel programs

Luxury Travelers

- ✚ High income couples, friends traveling together or families
- ✚ Well experienced travelers who value excellent customer service
- ✚ Stay in high-end accommodations
- ✚ Use private transportation (minivan transfers or rented SUV)
- ✚ Could fall into any of the following niches:



o Honeymooners

- Will contact a Travel Agent to plan a detailed travel itinerary
- Typically outspend the average traveler by more than three times
- Will secure reservations well in advance (6 months to a year ahead)

o Single or Married Couples

- Plan a trip without their families at least once a year
 - Will secure reservations well in advance (6 months to a year ahead)
- **Family Travel**
 - Will plan at least one trip a year to a different destination
 - Typical family size ranges from 4 to 6 members
 - Will secure reservations well in advance (6 months to a year ahead)

Other Group Travel

- ✚ Budget to moderate spending
- ✚ Will purchase pre-packaged services through a Travel Agency or Wholesaler
- ✚ Will travel as a group with pre-arranged reservations, transportation and guided activities for specific purposes such as:
 - Bird watching
 - Nature observation
 - Senior group travel
 - Cultural interest groups



Sun and Sand Travel

- ✚ One of the most popular travel activities fit for people of all ages and profile
- ✚ Travelers' budgets may range anywhere from low to very high end
- ✚ Travel stays usually range between 5 and 7 nights
- ✚ Family travelers prefer spending more on tours vs. expensive accommodations and usually seek all-inclusive resorts
- ✚ Couples and honeymooners prefer spending on high-end accommodations



Volunteer Tourism

- ✚ Travel for specific social aid purposes, community work, sustainability projects, etc.
- ✚ Room and board is usually pre-arranged with local communities/organizations
- ✚ Little to no spending
- ✚ Volunteers are typically in their 20's-30's



Three client request types to keep in mind :

A. The informed client:

These are very confident clients who have read endlessly about the destination and know exactly where they would like to go and what activities they'd like to do. They have probably researched to know they are dealing with a reputable travel planner and may have a good idea about lodging and tour pricing.

Example:

Client name:	Tom Parker
Number of passengers:	3 adults, 1 child (12)
Travel dates:	Last two weeks of August.
Lodging preferences:	We would like to stay at Loma Lodge for 5 nights

Tours and activities: We would like to sign up for the following tours:

Day 1: Airport pick-up /arrival day

Day 2: Boat trip to Dolphin Bay

Day 3: Visit to Zapatilla National Park

Day 4: Boat ride to Salt Creek and Jungle Tour.

Day 5: Day to relax on the beach

Day 6: Departure day/ Airport transfer service

Tip: Try not to change their plan around too much, rather make sure it makes sense and try to fill out any gaps to ensure a smooth program. This client type likes knowing where he's spending the money, so provide him/her with a detailed price quote.

B. The Easy Sell:

This client type wants you to recommend alternatives and pretty much let you decide for them within their defined preferences. They don't have much knowledge about the destination and their budget is usually pretty loose. They are looking for a proactive trip planner whom they are able to trust with all their needs.

Example:

Client name: Sarah Jones

Number of passengers: 2 adults, 2 children

Travel dates: Anytime between November 01-30, 2009

Lodging preferences: Moderate to luxury ocean-view hotel

Tours and activities: Surfing, scuba-diving, hiking, bird-watching, cultural activities, any must-do activity

Heads-up! These clients usually don't have the time to meddle with extensive communications or too many questions from you, so anticipate all their needs and try to make their trip planning as easy as possible. If their expectations are met, this traveler will become part of your repeat customer base!

C. Free-Riders:

This client is fishing around to find a "free ride" or cheap ticket. He/she will typically send out requests to several other providers trying to match the lowest package price. While we should aim at utilizing our lower-end products and find creative ways to meet this traveler's budget, we should never lower our service standards by seeking travel providers who do not adhere to our sustainability guidelines.

According to Prakash Sadagopan, Director of Product Strategy at Converges:

"Customers who are always looking for the lowest price are not loyal. They skip from one company to the next looking for the next best deal. To really build a business you need and want a customer base that is loyal to you. Those loyal customers form the backbone of a successful business, because they not only come back time and again, they tell their friends and family about you." (Prakash Sadagopan at the OSS/BSS Asia Pacific Summit).

So YES, we must do what we can to get this traveler to book through us, but sometimes it is best to know when to let go!

3. Skype Calls and Online Chat

Clients like communicating in different ways. The previous subject deals with internet requests where clients fill out an enquiry form generated through the travel agency's website. Other clients prefer talking to a representative directly; this might be a more personal approach, where they are able to obtain answers right away, as well as share a little bit more about their preferences.

Online chat and voice conversations through the internet have become very popular for conducting personal as well as business conversations free of charge. This is especially useful when we want overseas clients to be able to reach us or vice versa. Online chat allows users to e-mail back and forth online, in other words, having a *live* e-mail conversation. One of the most common software utilized nowadays is Skype, a software application that allows users to make voice calls over the Internet. Additional features include instant messaging, file transfer and video conferencing. By displaying our Skype name on our website, we can invite customers who use this software to communicate with us.

Other available programs for conduction online chat are AOL Instant Messenger, Windows Live Messenger as well as popular networking sites such as Twitter or Facebook. If we would like to invite our clients to communicate with us through any of these sites, add your User Name to your signature as well website contact information.

4. Phone Enquiries

As previously mentioned, there are clients who would rather talk to someone instead of e-mailing back and forth. Telephone conversations enable a customer to get closer to their travel agent or representative. Clients who prefer planning their vacation by phone are usually people who enjoy social interaction; some look for reassurance about the person or company who will be handling their plans. **A well conducted phone conversation may enable you to earn someone's trust a lot faster than via e-mail.** By the same token, if a representative appears unfriendly, insecure or lacks a positive attitude over the phone, a client will lose interest twice as fast!



It is important for Travel Representatives to display accurate phone numbers both on the agency's website as well as on e-mail signatures; in addition, you should be clear about office hours during which a representative is available to receive phone calls.

Example:

Liana Hernandez
Travel Consultant
Solimar Travel
liana@solimartravel.com
www.solimartravel.com
☎ 800-1234-5678
☎ **Direct:** + 011 (506) 2228-0867

5. Repeat Clients

People who enjoy traveling will usually plan a trip at least once a year, especially when it comes to family trips. There are travelers who simply enjoy returning to the same destination if their past experience was favorable. Although others might prefer visiting different places, eventually, they will come back to those experiences that linger in their minds. This means that if their expectations were met and surpassed both during the travel planning stage as well as during the actual trip, they will very likely want to seek your advice time and time again.

Consider the following repeat client statistics:

- Repeat customers spend **33%** more than new customers.
- Referrals among repeat customers are **107%** greater than non-customers.
- It costs **six times more** to sell something to a prospect than to sell that same thing to a customer.

(Source: About.com: Marketing)

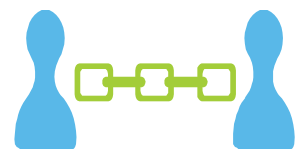
What is the lesson learned? To make sure we **keep** our repeat clients, always treat them as though they are “family” to our business. In other words, go out of your way to make them feel special and valued.

6. Client Referrals

Past clients whose overall experience booking through us was successful (trip planning + booking process + travel experience), will undoubtedly tell their co-workers, friends and family about it. So this is not only free publicity for the destination you’re trying to sell, but more importantly free publicity for you as a trip planner and travel provider. For this reason we should make every effort to go beyond our clients’ expectations all through our last contact with them.

Take a company such as Costa Rica undiscovered- www.costaricaundiscovered.com. The company was created 5 years ago, by two friends who spent some time traveling around Costa Rica. They returned to their home state in Washington, DC and started to sell authentic travel packages to their friends and family. Soon, this customer base was enough to help the business expand and grow into a small reputable travel provider. Although marketing efforts have been little to none up until today, the company has been able to stay afloat through repeat travelers and their referrals.

Now, this is not to say we should be content with client referrals as a single means for the travel office to subsist; a client base should come from several sources in order to maximize profit. Like with Repeat Clients, we must make these clients feel special. Firstly, express how you much you appreciate the person who referred them to us. Secondly, show extra care in the service you provide to ensure the **chain of referrals** continues to grow!



7. Local Business Referrals and Word of Mouth

Making friends with local hotels and other nearby businesses may prove to be a valuable asset for the travel office. Not all travelers like to plan ahead; many enjoy “winging” it and booking their daytime activities until they arrive at the destination.

The receptionist at the hotel they stay in usually becomes their number one trip advisor, taking the place of an agency -- especially when it comes to small hotels. Needless to say, it is essential to keep local hotel employees informed about our product. We may do this in a few different ways:

- ✓ Invite the hotel's key representative for a visit to the travel office periodically. This may serve two purposes: having the hotel keep you up to date with their product and rates as well as keeping the hotel representative informed about your own product.
- ✓ Ask to have your brochures or other travel material displayed at the hotel, close to an area of high transit.
- ✓ Become part of local travel associations where you may establish good rapport with hotel personnel and tour providers.



8. Tour and Travel Trade Shows

Most wholesalers, travel agencies and tour operators attend one or more travel trade shows every year. This is an opportunity to offer their services to a specific market segment which attends the show for different reasons. Buyers who attend the show could be single (FIT) travelers, groups, outbound travel agencies or other independent travel consultants.

Certain trade shows are set so that *Vendors* (those offering their services) have pre-set appointments with *Buyers* (those looking to purchase a travel package or plan a vacation) that are specifically interested in their product. At other trade shows, Vendors may set up their own appointments and Buyers are able to visit those stands or companies that interest them. **The result is a face to face encounter between Vendor and Buyer which very rarely occurs in our day to day business.** This golden opportunity of getting to know someone in person may very well define a sale as well as a long-term relationship with a client.

Through tourism trade shows Vendors may be able to obtain a significant amount of contacts and travel leads. The key factors in obtaining good results are preparing well in advance and sending the requested information ***immediately*** after the appointment. In cases where time or technology does not allow it, we should follow-up as soon as the trade show is over.

SECTION II: Defining your Product: Why Travel to Bocas del Toro (or Destination)?

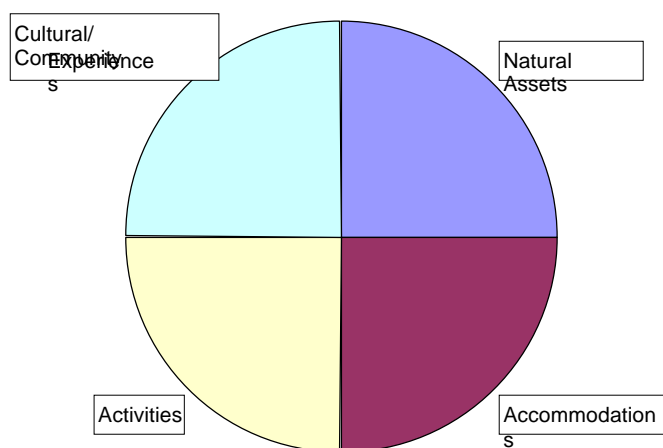
Learning Objective:

After this lesson, Sales Representatives will be able to market their destination by highlighting its natural and cultural attractions as well as those features which set it apart from other competing destinations.

In order to capture the market segment we are after, we must begin by clearly defining what it is the destination offers; in other words, we should ask ourselves **what is the product we are selling?** To answer this question we must have a clear idea about those elements that make the destination unique, such as climate, geography, activities that are offered, and cultural or historical attractions. This combination of elements is what defines your product.

Having a clear understanding of your product will allow you to define your target market. This could include specific interest groups, such as divers, nature lovers, bird-watchers or honeymooners, for whom you may then create specific packages. Becoming an expert in your product offer will also help you become a better sales representative; it will give you the ability to pinpoint the location, lodging and attractions that best matches your client's preferences and profile.

1. What sets my Products and Services apart?



A. Natural Assets:

- **Island Archipelago and Mainland:** six densely forested islands include Colon, Bastimentos, Caranero, San Cristobal, Popa, and Pastores. The mainland includes 95% of the World Heritage site of Parque Internacional La Amistad
- **Wildlife Species:** Over 100 species of mammals (including howler monkey, white-throated capuchin, night monkey, and caymans), endangered wildlife species including manatees and sea turtles, amphibians and birds.
- **Bastimentos National Park:** encompasses part of the Bastimentos Islands and the Zapatillas Caye coral reef. This park includes rich mangroves and over 57 different coral species.
- **Beaches:** Bocas del Toro's beaches are characterized by peaceful clear waters and white sand. Surf, sailing, swimming and diving are the most popular sport activities that can be practiced throughout the Archipelago. The most visited beaches include:
 - Cayo Crawl
 - Red Frog Beach
 - Dolphin Bay (Laguna Bocatorio)
 - Hospital Point
 - Bocas del Drago
 - Starfish Beach
 - Playa Bluff—great surfing
 - Playa Paunch
 - Wizard Beach
 - Carenero Beach
 - Long Beach

B. Accommodations:

Figures from the *Sustainable Development Strategy for Bocas del Toro* (June 2008) indicate that there are 105 types of lodgings at the destination making up a total of 893 rooms.

Lodging categories include: hotels, guesthouses, self-catering apartments and all-inclusive resorts.

Tip: Categorizing lodgings by Location as well as by Price Range (Low budget, moderate and Rustic luxury) makes it easier for you as a Sales Representative to recommend the lodging that best fits your client's requirements.

Following are some hotel examples by price range:

Low Budget:

Community home stays
Guest houses

Moderate:

Hotel Bahia, 3rd main street
Hotel Bocas del Tour, town center
Hotel Las Olas, Town center

Rustic Luxury:

Popa Paradise Beach Resort, Popa Island
Al Natural, Punta Vieja, Bastimentos Island
Hotel Playa Tortuga, Colon Island

C. Activities:

The Island offers a wide array of activities for people of all ages; nonetheless, Bocas has great potential to improve both the quality of tours as well as increase the product offering. Categorizing activities into specific interests helps customers identify those activities that best fit their profile. This also aids clients in balancing out their trip by choosing at least one activity from each category.

Here is an example on how to categorize activities available at Bocas del Toro:

Community Activities:

- Learning about Indigenous culture and traditions (Example: Naso community)
- Learning about traditional crops and methods of cultivation by helping to plant and harvest on a working farm.
- Indigenous language lessons
- Tour of Botanical gardens
- Traditional Dances
- Lessons in handicrafts from local artisan
- Practice traditional fishing techniques
- Evening of traditional Naso storytelling over a campfire
- Cooking class for preparation of native foods
- River trips on traditional style balsa rafts

Nature and Sightseeing:

- Bird watching
- Butterfly farms – Butterfly Garden (Luis), La Loma, Carenero
- Wildlife observation

Soft Adventure activities:

- Biking
- Hiking
- Horseback Riding
- Boat Tours to several beaches
- Snorkeling

Hard Adventure activities:

- Sea & River Kayaking
- Scuba Diving

- Surfing

D. Cultural Experience:

The Bocas del Toro Archipelago is characterized by its small town Caribbean charm. Here, travelers are still able to find authentic traditions and a rich historical background.

Culture and traditions:

Its Afro Caribbean population is a mesh of cultures resulting from immigrants that arrived from Jamaica, San Andres and other Caribbean islands during past centuries. Indigenous tribes still inhabit the island, the Ngobe being the largest. Other present tribes are Teribe, Guaymi, Bri Bri and Cuna. Economic activities such as fishing and Arts & Crafts are still a way of life for many of these inhabitants.

Tip: Include a “Cultural Highlight” or short paragraph on your travel proposal about the Archipelago’s indigenous populations and some interesting stories about their everyday way of life. This will create interest, especially for those travelers drawn by a destination’s cultural element.

Here is an example of the type of information you could incorporate either at the beginning of your travel proposal or near an activity description that refers to community tourism:

Cultural Highlight!

“The Naso, also known as the Teribe, have been the inhabitants of the mountainous jungle region of the northwestern corner of Panama since long before the Spanish colonizers ever reached the shores of Central America. The arrival of the Spanish in the 17th century led to a decimation of the Naso population with war, relocation, and disease. Today, the remaining Naso live in 11 small communities located along the Teribe River amid the lush forest of the La Amistad International Park.

The Teribe river is of great historical and modern day importance to the Naso. Although called the Teribe by the Spanish, the original Naso name for the river is Tjër Di . ‘Di’ means ‘water’ and Tjër is the mythical “Grand-Mother”, the guiding spirit of the Naso ancestors. The Naso are proud to be the only remaining monarchy in the Western Hemisphere. The population of about 3,500 Naso people all pay allegiance to the king, who resides in his royal palace in the community Sieyik, the center of the Naso region. The king governs with the help of his consejo (board of advisers), representatives drawn from the various communities.” (Drawn from www.soposo.com)

Local Festivals and Events

Clients might also find interesting to learn about the following Festivals and Events, especially those seeking to take part in typical cultural events:

- Año Nuevo (New Year’s Eve celebration): December 31st
- Carnavales (Carnivals): February/March
- Semana Santa/ Holy Week celebration: March/April
- Independencia de España: November 28th
- Mother’s Day: December 8th
- Christmas: December 25th
- Feria Internacional del Mar (International Festival of the Sea): Last week of September

- Palo de Mayo: May 1st
- Día de la Virgen del Carmen: July
- Founding Day: November

SECTION III: Understanding the Key Elements of Effective Customer Service

Learning Objective:

After this lesson, Sales Representatives will be able to understand those skills and personality traits required to become an effective Customer Service Agent.

A successful business results from a combination between **the right product or service** and providing our customers with **the right customer care**. Customer Service then becomes part of the product we are selling, not just a way to sell this product.

Section II explained how to create **a unique product** by identifying those characteristics that set it apart from other destinations: its Natural Assets, Accommodations, Activities and Cultural Experience. Now, to complete the Product we would like to sell, you will need to provide the right Customer Service. **What do customers want and need to keep coming back to you time and again?**

What are customers looking for?

a. A Reputable business:

Before coming to you, many travelers make a background check to see whether the travel company belongs to certain recognized travel associations or have alliances with other organizations that add credibility to the company. They may also search over the internet for what travel publications such as Fodor's or past clients had to say about your business. This means that every single client you serve is contributing towards the reputation you establish.

b. Personalized attention:

It's a fact - we all like to feel special and enjoy being treated like a king. After all, it's our money we are spending and would like to get our full money's worth. Things like addressing your client by their name throughout a verbal or written conversation, and taking the time to really listen will go a long way in making them feel special.

c. A Trustworthy Attitude:

People need to feel they can trust whoever is at the other end of the phone or e-mail in order to open up to you and trust you with their travel plans. Addressing clients with a confident tone and showing honesty are key elements in projecting you are a reliable person.

d. A Knowledgeable and Specialized agent:

Clients are coming to you for a reason- you're supposed to know more than they do about the destination! You need to do as much research as they do. Clients need to sense you have all the necessary knowledge to ensure their vacation plans will go smoothly; thus, make sure the information you give away is as accurate and up to date as possible.

Always appear as though you are the expert, even if you don't have all the answers at the moment. *The only way to truly understand what you are selling is to see it for yourself!*
Laurie Brown –international trainer and consultant on sales and service skills - recommends to “take 15 minutes out of your day and learn something new: read what your customers read; find out what others are saying about your products and services; learn about your competition. (“What your customers really want”. Article by Laurie Brown).

e. Options that fit their needs:

More and more clients are looking for someone to design travel options that fit their specific age group, interests, budget and preferences. While there are still those that go for travel packages sold to the masses, the need for *customized travel (also referred to as tailor-made)* has grown over the past few years. Thus, clients expect lots of flexibility and being presented with enough options to match their interests.

With as much competition and today's tough economy, there is simply no room for poor customer service. Here is what it takes to win and keep your customers:

Top 8 characteristics of a GOOD Customer Service Provider

1. Accessibility:

Accessibility entails making it easy for your customers to book their trip through you. It includes small, everyday things such as speaking their own language, replying to their e-mail or voice mail messages as quickly as possible, providing them with a clear list of the tours you offer with detailed descriptions, sending them a travel quote based on the things they mentioned were important during your previous communications and offering a flexible method of payment.



2. Availability:

Customers like to know they are able to get in touch with you when they need to; to them this means 24/7! Although this is not always possible, make sure office hours are suited to meet their demand. Offer alternate methods to communicate with you, such as your direct e-mail address, an 800 number or a pager. For instances such as weekends or special holidays when you are unavailable to answer the phone, make sure your voice mail message clearly explains what to do in case of an emergency, such as contacting someone else or directing them to a website where they are able to find information in the meantime.

3. Good rapport = empathic service:

Good rapport is about establishing a connection with your customers; in other words, being empathic or understanding of their situation and needs. Once you've established good rapport, you are well on your way to earning your customer's loyalty!

Following are some ways to establish good rapport:

- A. Greet your client in a joyful manner. Smile both while on the phone as well as in front of the client.

Example:

Phone conversation: “Good morning Mr. Jones, thank you for contacting us! How may I help you today?” *Tip: If you smile while on the phone, your client will be able to sense it!*

E-mail message: “Dear Ms. Cook, it was really nice talking to you over the phone yesterday. Thank you again for coming to us! Based on our conversation...”

B. Ask specific questions that tell a client you would like to learn more about them

Example: Please tell me Mr. Jones, how old are your children? What type of things does your family enjoy doing together?”

C. Repeat what the client is trying to tell you in your own words

Example: “So just to make sure I understand what you are saying, you would like to visit a quiet beach, where the children are able to swim, within a short driving distance from nature-oriented activities. Is there anything else you look for in the hotels you enjoy staying in?”

D. Refer to your client by their name as much as possible

Example: “Thank you once more for contacting us Mr. Jones. I assure you we will plan a unique and exciting vacation for your family. By the way Mr. Jones, do you have a specific set of dates during which you would like to travel?”

4. Timely response:

People who use the Internet to make travel inquiries expect a fast if not *immediate* response; the same thing applies to voice mail messaging. **Clients expect a reply to their initial Internet or telephone contact at least within the next 24 hours.** Although this message shares on the voicemail and email responders that a response may take up to 24 hours, **the Sales Representative is responsible to respond to enquiries within four hours of receiving them by emails (during business hours).** In today’s competitive tourism industry, taking any longer than this for the initial response may result in a sale lost to a competitors product. If there is a delay in the information you are preparing for your client, you should let them know about it immediately. Clients appreciate knowing when to expect a response; even a short follow-up note will make you look like you really care and took the time to communicate.

Example:

Dear Mrs. Rosenberg,

I apologize for the delay in sending the travel quote we discussed two days ago. I am still waiting to receive a reply from one of the hotel providers I’m considering for your trip. I should be hearing back from them today at the latest and will hurry to send you a detailed travel itinerary and quote as soon as I do.

In the meantime, I am attaching a list of all the optional tours available on Bastimentos Island for your review. Please feel free to indicate the ones you would like me to include on your travel quote.

Thank you for your patience,

5. Pro-activity:

Customers value an agent who thinks about their needs before they do. This not only shows real concern but expertise, which will both earn you credibility and trust as a representative. **By pro-actively seeking out opportunities to help your customer, you will create an added value in the service you provide.**

Example A:

“Mrs. Rosenberg, I highly recommend you purchase travel insurance in case anything unexpected should occur. I am attaching information about a trustworthy provider we have worked with in the past, should you decide to get it. “

Example B:

“Mr. Jones, I know of a wonderful spa near the hotel you’ll be staying in. Please let me know in case you would like me to make reservations for you and your wife. The hotel offers a shuttle service that will take you and pick you up after the massage, at no additional cost. ”

6. Flexibility

The travel industry is a business of servicing clients and making people who like to travel happy. This entails saying “YES” much more often than “NO”. Try to find ways to say yes to your clients’ requests by finding creative solutions or alternatives to a nearly impossible request. If what they are trying to accomplish is not offered or goes against company policy, do your best to explain why it would be in their best interest to choose another option and offer enough alternatives. **Being flexible to your clients’ requests shows them you care enough to accommodate them.**



Example:

“Robert, I understand why you would like to travel from San Jose to Bocas del Toro by land on the same day. Unfortunately, it will take you 4 hours just to reach Puerto Viejo. From there, you need to cross the border at Sixaola and take a boat to reach Bocas del Toro; this may only be done during daylight.

To actually take advantage of this ground trip, I suggest you spend the rest of the day in Cahuita area, where there are a number of fascinating things to do. You may then travel out to Sixaola early next morning, reaching Bocas del Toro close to lunch time. Another good alternative in case your travel schedule doesn’t allow adding this extra day would be to fly from San Jose directly to Bocas. While I know you would prefer to save on this transfer, the flight fare will end up being comparable to what you would end up paying for ground & boat transportation, lodging and meals out in Puerto Viejo area.

7. Accountability

Once you have been entrusted with a client's travel plans, you are expected to take full ownership of this role. This not only means being responsible for planning a close to perfect experience, but finding solutions to any issues they encounter. **Even if you are not directly responsible for the problem, you should take charge in getting it resolved.** Contact the travel provider responsible for causing the problem and get them to resolve it as quickly as possible.

Here is a list of possible issues a client may encounter and possible solutions:

Problem: Tour got cancelled last minute due to poor weather.
Solution: Try to schedule another tour that is available through the same provider; if none is available for that same time slot, try to fill out any other free days client may have. Otherwise, client needs a full refund.

Problem: Hotel room was in poor condition / too noisy.
Solution: Try to move guest to another room while he's still there. If this is not possible, the hotel should allow a partial refund.

Problem: Client did not get picked up by private transportation provider.
Solution: Try to reschedule client for pick-up immediately even if it means using a different provider. Contact transportation provider for full refund and have them draft an apology letter for your client explaining the reason for their mistake.

8. Efficient follow-up

One of the top reasons why we lose a sale is poor follow-up. **Follow-up must become an ongoing part of the sales process in order to increase conversions!** In short, follow-up means contacting a client either by phone or e-mail to find out whether they have any questions or comments regarding information we sent them (it could be a travel proposal). This communication is a thermometer which allows a sales person to find out a little bit more about the client and sense whether our offer is on the right track or not. It also shows the client we are interested in their business.



Guidelines for efficient FOLLOW-UP throughout the sales process:

During the Sales Process:

- Send a follow-up note 3-5 days after having sent a travel proposal/quote to find out whether client has any questions as well as whether they would like to see other options. If your client prefers talking by phone, try to call them instead. Know when to back off, in case client is simply not returning any of your e-mails or phone calls.
- Always end the note or conversation by "leaving the ball on your client's court". In other words, kindly let them know you will be waiting on their response in order to continue with their trip planning or reservations.

Once Sale is completed:

- Once you have sold a tour or travel program, send a follow-up note to re-assure your client that all reservations are in place and plans are going accordingly. Let them know you would be happy to answer any questions client may have prior to their arrival.
- Call your client upon their arrival to the country (if applicable) to ensure they arrived safely and ask whether they need anything or have any questions.

After trip is completed:

- Once client departs the country (both for full travel programs as well as single day tours purchased by client), send a follow-up e-mail note asking for client's feedback on the different services they received and showing interest in their level of satisfaction. This is a wonderful opportunity to learn both good and not-so-good parts about their travel experience to allow you to improve on.



Sample Follow-up Note:

Dear Mr. Jones,

I hope this note finds you well. I would like to make sure you received the travel proposal I sent you last Monday. You will notice I included several tour alternatives for you to choose from, for the time you'll be spending on Bastimentos Island. Once you let me know which of those activities might interest you, I'll be happy to add them to your travel program's total price.

I would be happy to go over the travel itinerary I am proposing by phone, as well as answer any questions you may have at this time before moving on. Please let me know whether you would like to set up a time to discuss this.

Kind regards,
XXX
Travel Consultant

Look out for some of the most common errors that will turn your client away and make you lose a sale!

1. Poor client profiling:

Profiling means finding out about your client's preferences: how they prefer to travel (rental car, private driver, flying, bus), what they look for in a hotel, their hobbies and personality traits. If we fail to obtain such details, we will be sending out useless information and selling the wrong product for your client. Always get into the habit of **listening** to everything your client has to say. Then, ask the right questions to obtain an accurate profile of your client.

2. Untimely response:

A late response is a sign of lack of interest and compromise from a travel planner; this will quickly turn off a potential client. It is very likely that clients will choose the travel provider that was quicker to respond to their initial request. As previously discussed, a timely response must occur within the next 24 hours of having received a request. All other communications may take 2-3 days, as long as we keep our client informed.

3. Poor rapport:

A travel planner, who treats every client the same, fails to set a friendly tone and shows a lack of enthusiasm about their client's interests will constantly lose sales opportunities.

4. Rigidity:

A rigid planner makes clients feel as though all of their requests are simply impossible. This is someone who doesn't use the word "yes" too often and gives out the impression that their final goal is to contradict their client. For instance, if a hotel is unavailable over the dates the client has chosen to travel, they will simply tell the client their travel dates need to be changed. A flexible planner would explain how they are currently waitlisted at the hotel and offer a similar hotel as an alternate plan.



5. Lack of follow-up:

Many clients lose interest simply because their contact failed to get in touch with them throughout the sales process. If they are unsure about traveling at a determined time or traveling to your specific destination, they may simply lose interest. Sometimes all it takes to convince an indecisive client is a friendly push.

SECTION IV: Handling an e-mail or online generated request

Learning Objective:

After this lesson, Sales Representatives will be able to:

- Recognize different types of travel enquiries
- Send a professional e-mail reply to a client's online reservation request
- Adapt a reply to different types of client requests.

Just as important as it is to send a timely reply is to send the *right* reply. The first response we send our client pretty much tells them the type of business they are dealing with. A reply letter that is casual, filled with grammar mistakes and typos or misspelled words shows an unprofessional travel provider with little or no concern to details. A successful travel planner must reflect professionalism and attention to detail from start to end.

1. Types of e-mail inquiries and how to treat each one:

a. Client requesting specific information about traveling to the destination.

Example:

“Is a Visa required to travel to Bocas del Toro? Do I need immunization? What will the weather be like during the month of June? What is your exchange rate? How much should I tip a tour guide?”

Tip: Although this client simply wants general information about the destination, take this opportunity to explain what you are able to do for him/her and cordially offer your services. Even if they book most of their plans on their own, they might contact you for a day tour or anything else they're unable to reserve last minute.

b. Client requesting help with their trip planning: the request could be for a specific part of the trip only, such as tours, or the entire travel plan including reservations of hotels, activities and transportation.

Example:

“I would like to travel to Bocas del Toro with my fiancée for one week next November and would like help booking a nice hotel on the beach. We would probably be going on a couple of day tours from there. You may contact me at skjfls@yahoo.com with your advice.”

*Sincerely,
John Hill*

Tip: Even if the client is only asking for your help in booking a determined hotel, make sure you offer as much as you can, anticipating all of your client's needs.

c. Past client referral

Example:

“My friend Susan McIntosh traveled through your company last spring and hasn't stopped raving about her trip since. I would like to plan a similar vacation with my husband for next September.”

You may call me at 202.451.7654 to discuss this further anytime during the day. Thank you for your help.”

Mark and Jane Phillips

Tip: Any and all past client referrals should be treated like VIP's to guarantee the sales chain continues to grow. Start the e-mail by acknowledging you remember Susan and would like to take the opportunity to send her your best. Next, thank them for contacting you and ask whether they would like to do anything differently to customize the trip to *their* needs (not Susan's!). They might end up being higher spenders, so don't limit their proposal to what you offered their friend.

d. Repeat client

Example:

“Dear Vicki,

I planned a family vacation through you last year and we had an unforgettable time. This year, I would like to come back with three more couples and participate in activities we were unable to sign up for with the kids. Please put together a 6 night/7 day vacation proposal for us where we could do some adventure tours the first two-three days and then just relax at a resort the rest of the week. We would need four rooms and would like to stay as close as possible. I look forward to your reply as soon as possible!”

Martha Jones

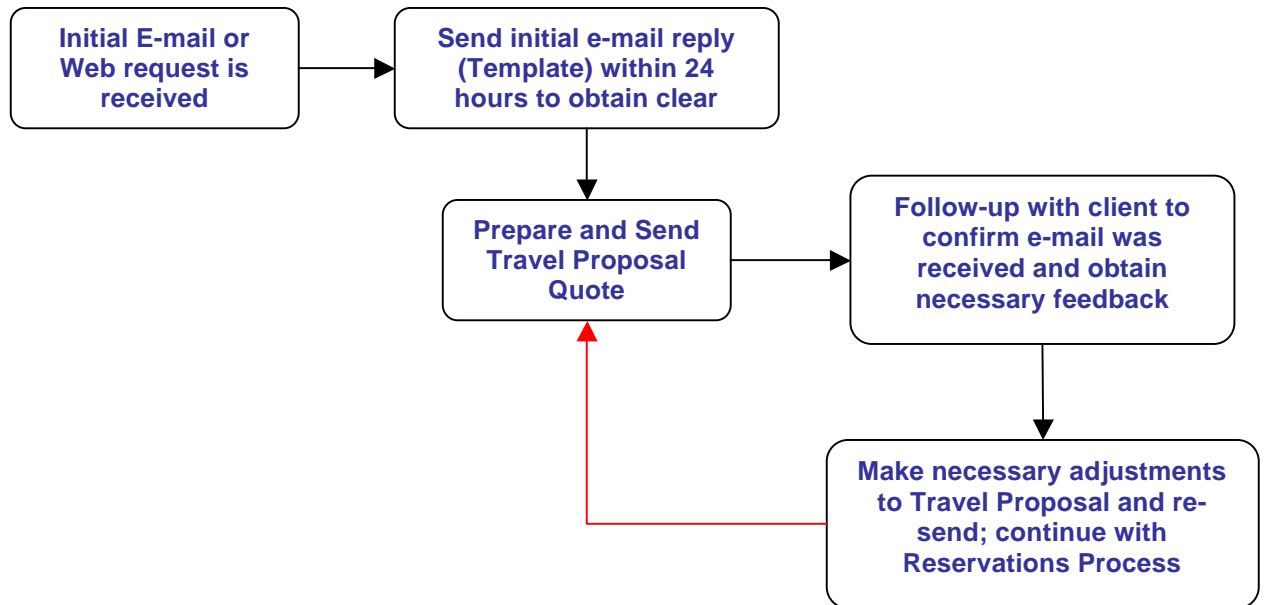
Tip: Repeat clients are a travel business's backbone. They not only ensure we have constant business coming our way; the fact that they contact us repeatedly tells us we are doing something right. Make sure you continue to “wow” your client every time by planning new and exciting trips every time. Always show your appreciation to them for continuing to trust you with their business.



Here are some ways to add value to your repeat clients' itinerary:

- Getting them a free night by taking advantage of a hotel travel promotion (4 nights for the price of 3)
- Going out of your way to assist them with their flight reservations or offering to book their massage appointment
- Getting them a complimentary welcome drink at their first hotel

E-mail Requests should be answered in the following sequence:



2. General Guidelines for handling e-mail requests

1. Reply to the initial request within 24 hours of having received an e-mail request
2. Send an initial message template that includes the following:
 - Thank client for visiting our website
 - Briefly explain who we are and describe the type of services we are able to provide
 - Briefly detail how we operate including: when client may expect a quote (in case we require more information before preparing one), how reservations are processed, our methods of payment and other relevant information.
 - Ask the necessary questions needed to better profile the client and request.
 - Reservations Manager contact details

Note to Sales Representative! The following template should be customized / modified depending on how much information the client knows about your agency, how much information they provided on their request, etc. While templates are very useful, BE CAREFUL not to let the client feel that it is a template. For example, ensure the font size and color of the final email are consistent and if you use an old template be sure you don't leave the last client's information in the template as this can lead to very embarrassing mistakes

Initial contact E-mail reply Template

Dear Mr. / Mrs. _____,

Thank you for contacting *Discover Bocas del Toro* to help plan your customized travel experience. My name is *Catta Ruenes* and I am based in Bocas del Toro; I will be your main contact during the planning stage of your travel experience and through your arrival in Bocas.

Please allow me to tell you a little about us. We provide customized travel experiences by combining a select group of sustainable hotels and tour operators. Our highly specialized travel advisors will assist you with:

- Developing a customized travel package based on your interests and budget.
- Making all reservations for hotels, transportation, tours and flights (optional).
- Providing you with all necessary information, including restaurant suggestions, packing instructions, local currency, weather, tipping, etc.
- Developing a comprehensive pre-departure package that has all the information that you need for your vacation.
- Meet and greet at the airport on your arrival.
- 24 hour in-country assistance and help line while in the country
- Satisfaction Promise - we will do everything humanly possible to ensure your trip exceeds all expectations.

One additional point that I would like to emphasize on is our commitment to sustainable tourism. This commitment will ensure that your vacation helps support local businesses who are helping their neighboring communities, minimizing impact on the environment and culture as well as boosting the local economy. We can arrange for community based tours or volunteering activities if you are interested. Where possible we try to use hotels that have been certified in sustainable tourism or those that are adopting Rainforest Alliance and the UN Foundation's sustainable tourism criteria, while ensuring that you have an experience of a lifetime!

→ **In case the client's request form is incomplete or lacks sufficient information you may add the following text:**

Please provide me with the following information that may help me customize your vacation based on your interests and budget:

- Do you have specific travel dates or are these flexible?
- How long are you planning to stay in Bocas del Toro?
- How many would be traveling with you (children's ages if any)?
- Would you prefer economy, moderate or upscale accommodations?
- What are your main interests or hobbies? Do you enjoy mild activities such as swimming, walking and nature watching or more adventurous sports such as kayaking, scuba diving or hiking?

I am attaching a travel itinerary proposal with my recommendations for your review. I will be following up with you shortly to discuss this. Again, I want to thank you for contacting us and I look forward to working with you to develop your customized travel experience. If you have any questions or concerns at any point during the planning process please feel free to communicate these to me.

Best Regards,

Catta Ruenes
Travel Consultant
Bocas del Toro Information Center
Ph: (507) 6086-2331
2524 Calle Tercera /Bocas del Toro, Isla Colon, Panamá
info@discoverbocasdeltoro.com
www.discoverbocasdeltoro.com

Lonely Planet says:

"Bocas' laid-back Caribbean vibe is enhanced by the archipelago's spectacular natural setting. The islands are covered in dense jungles of vine tangles and forest palms that open up to pristine beaches fringed by reeds and mangroves. Beneath the water, an extensive coral reef ecosystem supports countless species of tropical fish while simultaneously providing some seriously gnarly surf breaks."

3. Always maintain a professional, yet friendly and familiar tone on all your responses as well as phone conversations.
4. Once we have correctly profiled our client, prepare and send an initial itinerary proposal/quote, offering a short day-by-day description of the travel proposal. In cases where the request only calls for day tours, be sure to include a complete list with optional day tours that you recommend.

Tip: Make sure you go the extra mile in offering additional services, such as optional tours or a private driver and try to foresee other needs client may have for planning his/her trip; these may be priced out separately at the end of the quote.

(Sample proposal follows)

Travel Itinerary Proposal Template

Bocas del Toro Tourist Information Center
COMPANY LOGO

Costa Rica – Honeymoon Proposal

Client Name:	Mr. & Mrs. Seema Upadhyay
Travel Dates:	June 9 - 18, 2009
Highlights:	
Northern Region / Arenal Volcano area –	Arenal Lodge
Mid Pacific / Manuel Antonio Beach -	Si Como No Resort & Spa

June 09 Arrival in Costa Rica...transfer to Arenal Volcano area

<u>Transportation:</u>	Airport meet & greet and private ground transfer to the Arenal Volcano area. Total driving time is approx. 3 hours.
<u>Hotel:</u>	Arenal Lodge
<u>Room:</u>	Superior, double occupancy

This cozy lodge located on a 2000 acre property, surrounded by lush nature and a rain forest housing hundreds of exotic birds and animals, offers a unique panoramic view of the volcano and lake with our warm hospitality. The Lodge offers 50 beautiful rooms, a restaurant, a gift shop, 3 jacuzzi, a swimming pool, a game-room for children, an outdoor playground area, a Fitness room, a Steam bath, walking trails, free Internet access, Butterfly garden, trails and laundry service.

June 10 - 11 Arenal Volcano area...lava and hot springs

<u>Meals:</u>	Buffet breakfast included
<u>Hotel:</u>	Arenal Lodge
<u>Room:</u>	Superior, double occupancy

Enjoy the wonderful view surrounding the hotel facilities... You can choose between a challenging canyoning/rappelling tour, a more relaxed visit to a waterfall by horse or venture into the Venado Caves.

June 12 Transfer to Manuel Antonio Beach

<u>Meals:</u>	Buffet breakfast included.
<u>Transportation:</u>	Private ground transportation to Manuel Antonio Beach area (<i>time arranged at your convenience</i>). Total driving time is approx. 3 hours.
<u>Hotel:</u>	Si Como No Resort & Spa – www.sicomono.com
<u>Room:</u>	Superior, double occupancy

"Si Como No" expresses the magical nature of Costa Rica's incredible bio-diversity. It creates a vacation experience deeply rooted in the culture and pace of this unique Democratic country. Even the name "Si Como No", which means "Yes, why not?", reflects the warm and engaging personality of Costa Ricans, people blessed with easygoing charm and optimism, complemented by their high level of literacy and good health care.

June 13 - 16 Days to enjoy the beach and the beautiful surroundings....

<u>Meals:</u>	Breakfast included
----------------------	--------------------

Enjoy the beautiful beaches in Manuel Antonio National Park, take a horseback riding tour on the beach and enjoy the sunset on the catamaran adventure, surrounded by dolphins.

<u>Hotel:</u>	Si Como No Resort & Spa – www.sicomono.com
<u>Room:</u>	Superior, double occupancy

June 17**Back to San José...**Meals:

Breakfast included

Transportation:

Private ground transportation back to San José (time to be arranged at your convenience). Approximate driving time: 3 hours.

Hotel:Hotel Grano de Oro – www.hotelgranodeoro.comRoom:

Superior, double occupancy

Situated on a shady street just off Paseo Colón, San José's main thoroughfare, Hotel Grano de Oro is a true oasis in the heart of the city. Converted from a tropical Victorian mansion, the 32-room hotel maintains the warmth and comfort of a private home. Hallways are lined with photographs and original art can be found throughout the building. Enjoy lush tropical flower arrangements and luxuriant plants at every turn, and Italian tile fountains' grace.

June 18**Farewell Costa Rica...**Transportation:

Private ground transportation to Juan Santamaría Intl. Airport.

Total Package price for two adults: US\$ 2,505.00Package Includes: Lodging, meals specified, private ground transfers & government taxes.Package Does Not Include: Any additional local activities & meals, and departure tax (US\$26pp).**End of our services**

5. Follow-up either with an e-mail or phone call to ensure client has received their quote and see whether they have any questions at this time. Recommended follow-up time is 2-3 days after sending quote but may vary depending on client's travel date. If it is a last-minute request, we must make this client our priority and follow-up immediately.

Tip: While it is important to let the client know you care and are interested in his/her business, be careful not to appear as a pushy salesperson. Remember most people have busy lives, may be traveling or simply haven't had the time to study the proposal with their families.

Sample follow-up note:

Dear Mr. Jones,

Greetings once more from beautiful Bocas del Toro Archipelago! I would like to find out whether you received the travel proposal I sent you last Friday and let you know I would be more than happy to go over this with you or answer any questions you may have at this time. I very much look forward to taking care of your travel arrangements as soon as you are ready!

Warm regards,

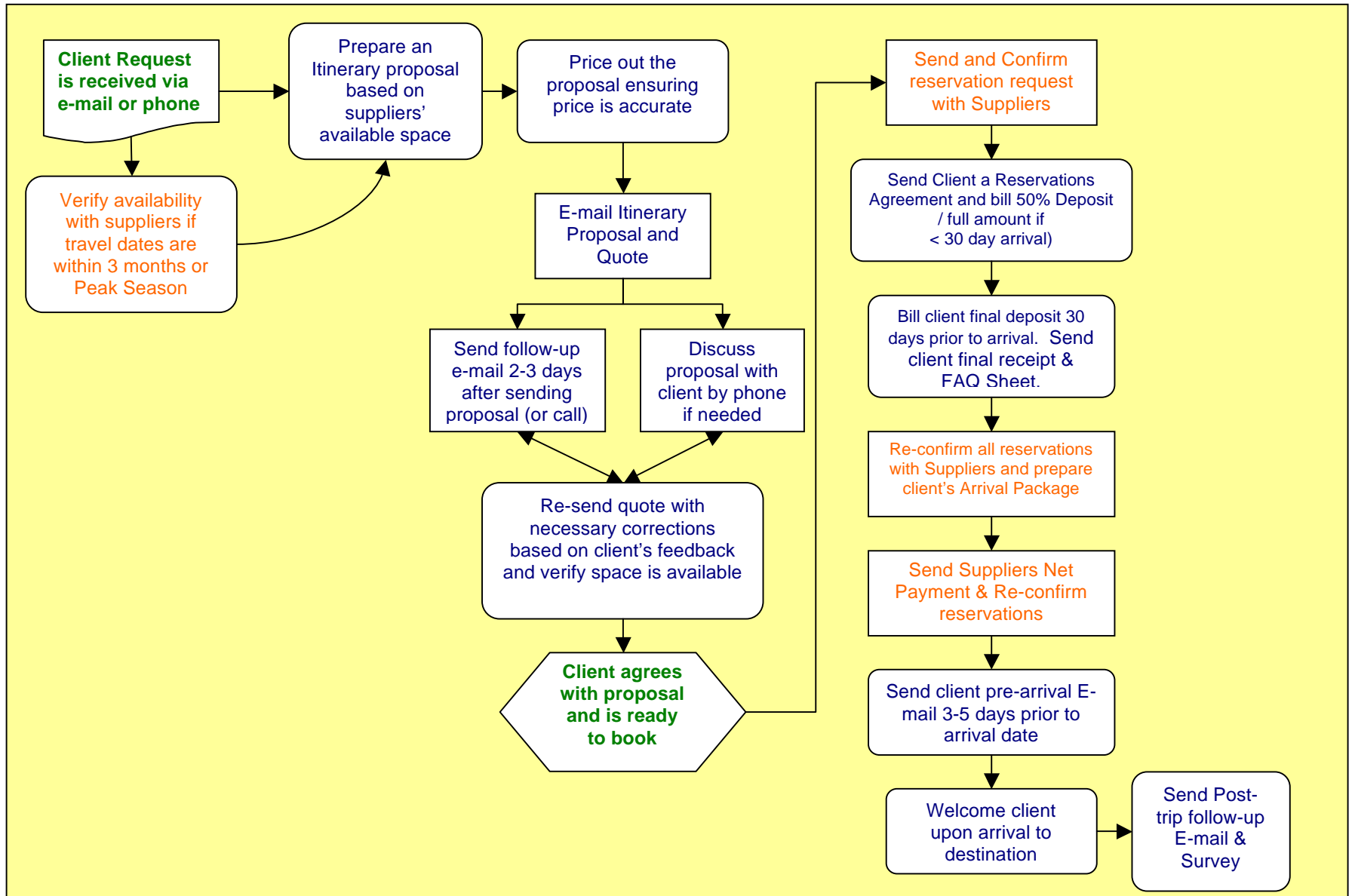
Vicki Brown
Travel Consultant
Bocas del Toro Tourist Information Center
www.discoverbocasdeltoro.com

6. Make all necessary adjustments to the Travel Proposal based on your client's feedback and re-send the document to ensure the client is ready to move forward with reservations. Begin reservations process.

3. Reservations Procedure from beginning to end

- a.** Request is received via e-mail or phone
- b.** Verify availability with respective Suppliers in case trip dates are within 3 months or during a Peak time to travel.
- c.** Prepare a trip proposal based on such availability
- d.** Price out the proposal and ensure final price matches client's budget
- e.** E-mail proposal
- f.** Follow-up with client 2-3 days after sending proposal to ensure receipt
- g.** Go through proposal with client if needed
- h.** Re-send quote with corrections based on client's observations / preferences
- i.** Confirm with client whether he agrees with the itinerary proposal and price and is ready to move forward with his reservations.
- j.** Once client is ready, confirm all services by sending out a reservation to each of Suppliers involved
- k.** Send client Reservations Agreement for signature and bill him/her for initial deposit (50% usually) once major reservations are in place (hotel reservations should be secured before billing client to avoid changes in pricing, losing space, etc.)
- l.** Bill client for final deposit 45-30 days prior to trip arrival. Send client a final receipt that details all purchased services. Enclose suggested Packing Instructions as well as General Information about the destination.
- m.** Re-confirm all reservations and prepare necessary materials to be delivered to client upon arrival (Vouchers, trip itinerary, maps or other necessary information).
- n.** Send Suppliers net payments (whenever applicable) to re-confirm reservations upon due dates set by Supplier and file receipts.
- o.** Send client Pre-arrival E-mail 3-5 days prior to travel dates, letting them know you are looking forward to their arrival and reminding them about any last-minute details (such as Airport pick-up instructions, necessary items to pack, passport, etc.).
- p.** Welcome client upon arrival to the country (phone call to hotel).
- q.** Follow-up with client upon trip completion thanking them for their business; E-mail Post-Trip Survey and follow-up on any negative feedback.

Reservations Procedure Flowchart



4. Up-selling Techniques

- Build a relationship with your client first: Ask enough questions to better get to know your client. This will send the message that you actually care about him/her, enabling you to win their trust and establish a personable relationship.
- Really “LISTEN” to what your client is telling you, and tailor his vacation to his/her needs.
- Always include optional services such as a list of day tours, transportation alternatives or another (more expensive) hotel alternative along with your initial proposal. People’s budgets may always be stretched a little!
- Try to find out whether your client has a set budget and what it is. This way you are able to choose services that best match this budget. Often times, people are planning to spend more than you thought they might initially!
- Send periodic e-mail offers and promotions, tied to specific holidays as well as your destination’s specific seasons.
- Create a Quarterly Newsletter to be mailed out to your client database



SECTION V: Skype Calls and Online Chat

Learning Objective:

After this section, Sales Representatives will be able to follow the proper etiquette for responding to Skype calls and online chat requests.

Another way to communicate with our clients is to talk over the internet via programs such as Skype or by having a live e-mail exchange via online chat programs such as AOL Instant Messenger. Most e-mail providers now offer an application for you to carry out live conversations with anyone in your contact list (Yahoo, Google, Gmail, Hotmail, etc.).

Social networking applications such as Twitter and Facebook have also gained in popularity. These channels provide a way for users to post their personal profile along with any type of information they would like to share with others; they're also able to select who is allowed to view this information. Users may also send e-mails and chat with members in their contact list.

Most of us follow general rules for conducting ourselves in public, such as how we dress, what we say and how we behave. Similarly, we should follow a certain set of rules on how to address our clients during a Skype or online chat conversation.

Etiquette guidelines for voice and chat conversations over the internet:

1. Try to create a User Name that somehow includes your name or relates to your company name.

Example: cattabsta (Bocas Sustainable Travel Alliance) or bocastic (Bocas Tourist Information Center).

2. When chatting (instant e-mailing), do not type in ALL CAPITALS. Capital letters represent shouting and is considered rude. Instead, try to set a friendly and polite tone by using words and phrases such as: "I would be happy to", "my pleasure", "absolutely", "right away", "thank you for contacting us", "I wish you a great day".
3. When answering an unannounced Skype call, answer the phone in a professional way, just like you would your regular phone line.

Example:

Good morning, this is Catta, how may I help you? Or Thank you for calling Bocas Visitor Center, how may I help you?

4. If you would like to contact a client via Skype, make sure you send him an e-mail asking in advance whether they would agree to a conversation, as well as what would be a convenient time for him/her. **Setting up a time to talk is good manners;** you could otherwise interrupt an important conversation, meeting or train of thought!
5. **Do not be afraid to say "I don't have the answer to that right now"!** Always reply to what you are certain about; let your client know you do not have the answer to his question at this time but promise to follow-up with a response once you do.



May I please?

6. Try to end the conversation cordially, if you feel it has gone on for too long, by offering to send your client a detailed itinerary and other relevant information (such as optional tours, FAQ's, hotel descriptions, etc.) via e-mail. You may offer to set up another time to discuss the requested information further.
7. **Follow-up** on what you discussed as quickly as possible! E-mail the information you promised or call back your client with an answer if that is what you agreed to do instead.

SECTION VI: Handling a *Walk-in* Client

Learning Objective:

To understand how to interact with clients who visit the travel office in person and what are the necessary steps to close a sale.

As mentioned previously, **walk-in clients are a solid opportunity to close the sale.** Your goal is to find the activity, tour operator and price that best fits the client's needs. Make sure you take the time to make small talk to establish a relationship with the client. This will enable him/her to trust you and the business you represent. Nonetheless, always be sure to display professionalism in how you conduct yourself. Lastly, remember there is usually something else the client might need; it could be an airport transfer, dinner reservations or a private shopping tour, so never stop at the first request a client makes.

The following Customer Service guidelines should be followed for all *Walk-in* clients:



1. Offer a warm greeting
2. Kindly ask visitor how you may be of assistance and allow him to talk
3. Ask any additional questions you might have in order to better understand his needs, such as his budget, number of passengers, children's ages, etc.
4. Explain the type of services we offer and what we are able to do at this time for the client, based on client's expressed needs. Be sure to think ahead and offer any additional services that might logistically make sense to combine with the tour or service client is interested in. For instance, if a client would like to book a diving tour, transportation from his hotel to tour's meeting point might not be included. This is a good opportunity to offer the added transfer service.
5. Once client has decided what he would like to purchase, clearly state the price, method of payment and process the charge if client would like to pay directly. If client would prefer paying to tour operator directly, we would need to have the client fill out a credit card authorization form to hold the tour.
6. Hand out a tour confirmation slip or voucher that clearly states what is included with the purchased service, contact information and phone numbers, as well as other relevant information such as: tour pick-up time, suggested equipment, tour duration, etc.
7. Thank client for their visit and/or purchase and invite them to call back in case they have any questions prior to the purchased service. *Tip:* Try to "throw in" free advice of your own about the area's good restaurants, bars or must see sights.

Example:

Travel representative:

"Good morning Mr. Smith, thank you for visiting our office. May I ask how you heard about us?"

Client:

“The hotel I’m staying in referred us; they said we could book some tours through you”. My girlfriend and I are staying here through next Sunday, so we are looking for both adventure and a little relaxation”.

Travel representative:

“Absolutely, I would be happy to help you plan the rest of your stay here in Bocas. Our main objective is to promote conservation of the area’s natural Resources, so all the activities we offer are aligned with this effort”.

Travel representative:

“I highly recommend a full day tour to Bahia Delfin (Dolphin Bay) where you’ll be able to observe dolphins in their natural habitat, snorkeling in Cayo Coral and some time on Red Frog Beach, a very calm beach where you may relax for the rest of the afternoon”. Here is the tour description: *(show client tour print-out or brochure)*.

Client:

“This sounds perfect. Does the tour include transportation from our hotel?”

Travel representative:

“It doesn’t but I would be happy to set this up for you. We charge \$3 per person each way. We take cash or credit cards, so I would only need you to sign this tour reservation form and I will confirm your tour. Your pick-up time at Luna Lodge is 6:00am. Here is what the tour includes as well as some recommendations on what you need to bring”.

Client:

“Great. Thank you so much for all your help.”

Travel representative:

Here is your tour voucher - have a wonderful time tomorrow! Give me a call if you have any questions at all or need help booking anything else before you depart. Here is a brochure that lists everything we offer. By the way, I know of a great restaurant you could visit for a really romantic dinner....

SECTION VII: Handling Phone Enquiries

Learning Objective:

After this lesson, Service Representatives will be able to:

- Answer the phone in a professional way
- Carry out a polite phone conversation
- Gather the necessary information to put together an accurate travel proposal

Clients who pick-up the phone to plan a trip are very often ready to make definitive plans and guarantee their reservations. These are usually people who mean it and do not “beat around the bushes”. The impression a client gets from the representative at the other end of the line will pretty much determine what happens next.

Thus, if you as a travel planner answer the phone in a cheerful way, allow the client to speak, listen and offer valuable information, it is very likely he/she will be willing to do business with you. If on the contrary, you answer the phone with a lack of enthusiasm, showing little concern for the client and limited knowledge, the client might very quickly turn to another provider.

Etiquette for responding to phone enquiries

Follow these guidelines to conduct a professional phone conversation:

1. Greeting: When picking up the phone, cheerfully greet your client as follows:

“Thank you for calling Bocas Visitor Center, this is _____, how may I help you?”

2. Allow your client to speak as much as needed and LISTEN. Confirm your interest by using words such as: “I understand”, “I see”, “absolutely”, and “wonderful”.
3. Once the client is done explaining why he needs your help, ask relevant questions that may further help you obtain a good profile. Firstly, ask the client’s name; this way you’ll be able to address him by his/her name. The idea is to take advantage of this conversation to learn as much as possible from this client prospect. *You might otherwise end up writing a travel proposal that does not at all reflect your client’s needs.*

Here are some examples on what to ask during this conversation (in case the client didn't already tell you):

- Are you traveling with any children? What are their ages?
- Do you have any special interests or hobbies?
- Do you see yourself participating in slow paced tours such as birdwatching or higher endurance activities such as white water rafting?
- Would you prefer to stay at moderate or luxury accommodations?

Please make sure you obtain the following basic information from your client during your phone conversation. You may keep this Form close to your phone to remember to log in all details:

PHONE ENQUIRY LOG

DATE	CLIENT NAME	E-mail	Phone number(s)	TRAVEL DATES	# of Adults	# of Children / Ages	Client Request	Other Preferences & Comments
Aug 08-09	Bryan Phelps & family	bphelps@gmail.com	(702) 123 4567	November 12-18, 09	2	2 (8, 12)	Nice beach resort, all-inclusive, boat tours, kayaking, surfing	2 double beds, private transfers, A/C other friends might join them

4. Re-assure your client by providing useful ideas or options that come to mind at this time, related to their request.
5. Describe clearly how you will be assisting him with his request and what comes next in the planning process.

Example:
 “With the information you have provided me with, I will put together a travel proposal with my recommendations. I will be e-mailing this proposal by tomorrow at the latest; please let me know if you would like us to go through it via telephone once you’ve had a chance to see it. Thank you once more for contacting us; I really look forward to planning your family’s next vacation! Have a nice day Mr. Brown!”

SECTION VIII: Handling Tour & Travel Trade Show Enquiries

Learning Objective:

After this lesson, Sales Representatives will be able to:

- Understand Trade Show dynamics
- Follow-up on Trade Show leads in a professional manner
- Calculate commission amounts according to industry standards

Trade shows provide attendees with an opportunity to stay in touch with travel industry colleagues, stay current with new products and their competition, and strengthen relationships with potential clients. As previously explained in Section I, attending travel industry Trade Shows may represent a significant source of travel leads to a Travel Agency. To ensure that the time and money invested during a Trade Show result profitable, we must first understand some general principles that make up these popular events.

1. Understanding Trade Show Dynamics

Most travel industry shows charge a participating fee to both Vendors and Buyers attending the event. In the case of Vendors, the fee involved covers the cost of the stand's infrastructure and services provided by the Convention Center where this takes place (among others). Vendors are those attendees who set up a stand to exhibit their service or product. These could include a destination's Tourism Bureau, wholesalers, travel agencies, hotels and lodges, tour operators, DMC's (Destination Management Companies) and transportation providers (Car rental agencies, airlines, bus providers) among others.

People who sign up as *Buyers* attend the event to visit the various companies represented at each stand. These may include free travelers, meeting planners, travel agents and wholesalers. Buyers may be looking to negotiate a better rate with specific suppliers, purchase a tour package or simply learn about a destination for future travel.

Visitors who stop by your stand, whether with or without a previous appointment should be greeted cordially and offered a short presentation about the product you are promoting. Always keep a log where you are able to record each visitor's contact information, interests and requests.

2. Guidelines for responding to Trade Show Enquiries

1. Immediately following the trade show, gather your notes or contact log and send a short e-mail message thanking every client for their recent visit to your stand. Make sure you address each client by their name and try to mention specific details regarding the client's enquiry.
2. In case you were able to obtain a specific travel request, include a detailed travel proposal. Make sure to follow-up with a phone call shortly after to make sure the proposal was received. This will show your client you care about his business.

Tip: Nowadays most convention centers have Wi-Fi access, so if you have spare time during the trade show make sure you send a follow-up e-mail thanking the

client for his time; next, let him know when he may expect to receive the travel proposal you discussed during the meeting.

Trade Show follow-up example:

Dear Mr. Phillips,

Thank you for stopping by at our stand at the Travel Expo!

I very much enjoyed our meeting and truly look forward to having the opportunity to plan your school's next Summer Abroad Program. As we discussed, I feel Bocas del Toro is the perfect match for your environmental course and I am certain we could come up with a wonderful program for 2010!

I have enclosed a few interesting itinerary options that could fill your program's requirements. As soon as you are able to set the program dates we can start pricing out any of these alternatives. I would be happy to call you at a convenient time to further discuss the program as soon as you are ready to start planning this.

Cordially,

Susana Marin
Travel Director
Solimar International
Ph (301) 636-9565
susanam@solimarinternational.com
www.solimartravel.com

Using our experience to create yours!

3. In case a client stopped by your stand without having any specific request in mind, send a message thanking the client for their visit and briefly explain what you do and how you would be able to assist him/her as soon as he starts planning his visit to your destination.
4. In cases where the type of lead requires more information or a more detailed conversation, such as in the case of group travel, call the group's contact person as soon as the trade show is over to set up a time to discuss the program.
5. **Follow-up** on each of your leads 24-48 hours after you send a travel proposal. Try to call the client by phone whenever possible, especially if the lead represents an important source of revenue. You may otherwise e-mail the client, if you feel the client prefers written as opposed to verbal communication.

3. Calculating commissions

A commission is a discount percentage off a product's selling price, or *Rack Rate*. Service providers such as hotels, transportation suppliers and tour operators extend such a discount to intermediaries, such as travel agents or wholesalers, who sell their product to an ending client.

Wholesalers

Wholesalers package a series of goods and services to be sold in bulk; in other words, they offer their tourism packages to a wide variety of consumers and sell them in large quantities. Wholesalers are able to negotiate much lower rates, i.e. a better commission, with service providers because of the large amount of product they sell. In turn, consumers are able to purchase a set of packaged services (hotel, transportation, and tours) at a much lower rate than if they were to buy them directly.

The industry standard commission for Wholesalers is a 30% off the Rack Rate.

For example:

A local Travel Agency, **Sun Tours** sells a rafting day tour operated by **White Water Excursions**, a local tour supplier to **Mr. Jones**, an inbound client (client who travels from abroad).

White Water Excursions charges a total of \$80.00 for this tour. Sun Tours then invoices Mr. Jones for a total of \$80.00, while White Water Excursions invoices them a total of \$60.00. Thus, Sun Tours makes \$20.00 each time they sell this excursion.

Inbound Travel Agencies / Tour Operators

A similar scenario occurs with Outbound Travel Agents or Inbound Tour Operators. Suppliers extend a discount to these intermediaries for offering their product to their clients. The discount intermediaries get is usually lower in this case because Travel Agencies generally offer their services to a smaller share of the market.

The commission Suppliers extend to Travel Agencies is usually a 20% off the Rack Rate. This percentage may increase depending on the amount of business a Travel Agency is able to generate for them.

Now, Inbound Travel Agencies may also pay out a commission from their own profit margin to Travel Agents who contact them from abroad. So in a way, these travel agents come up with the client, while the Inbound Agency comes up with the travel itinerary and makes all reservations directly. Thus, the *Inbound Travel Agency* invoices the *Outbound Travel Agent* for the cost of the trip less a percentage discount. The Outbound agent would then invoice their client the trip's *Rack Rate* or total cost of the trip

The commission paid out to outbound travel agents may go from a 5-10% depending on the local Travel Agency's own profit margins.

For example:

Love to Travel (Outbound Travel Agent) contacts **Sun Tours** (Inbound Travel Agency) asking for a price quote on a 4 day/3 night package to Bocas del Toro.

The trip total comes to \$1000 per person out of which Sun Tours has to pay their tour suppliers (hotels, transfer providers, tour operators, etc.) a total of **\$800.00** per person. Sun Tour's profit on the trip is **\$200.00 per person**, a 20% commission. Sun Tours extends a 5% commission to *Love to Travel* and invoices them a trip total of \$950.00. Love to Travel invoices their final client for the full price, \$1000.00 per person; this results in a \$100.00 per person profit for this sale.

Calculation:

Rack Rate (Trip's Total Cost):	\$1,000.00 per person
Less Net Rate (Pay out to Suppliers):	(\$ 800.00) per person - 20% discount *
Less Outbound Travel Agent's commission:	(\$ 50.00) per person - 5% discount **
Trip Profit for Inbound Travel Agency:	\$ 150.00 per person

* \$1000 x 0.80 (20%) = \$800. Subtract this amount from \$1000 to obtain the \$200 discount

** \$1000 x 0.95 (5%) = \$950. Subtract this amount from \$1000 to obtain the \$50 discount

In summary, following are travel industry standards for calculating commissions:

1. Wholesalers: 30% commission
2. Inbound Travel Agencies / Tour Operators: 20% commission
3. Outbound /Independent Travel Agents: 10% commission

Attention! The Bocas Visitor Center's profit margin or commission will be based on the negotiations they are able to firm up with each of the destination's suppliers. In many cases, local suppliers will only allow a 15% commission to Inbound Travel Agents. In this case, it would not make sense to extend a 10% commission to a foreign travel agent who contacts the Visitor Center trying to plan a vacation for his client in the United States. The total discount for the outbound travel agent could be calculated by averaging the different supplier's commission percentages how far you are able to go.



For instance:

<u>Travel Supplier</u>	<u>Commission percentage</u>
Hotel Bocas:	15%
Rafting tour:	25%
Budget Car Rental:	20%
Kayaking tour:	10%
Hotel del Campo:	15%

Average commission: 17%

This means that the Visitor Center's total commission on a determined travel itinerary comes to 17% off the total's trip cost. If we are working with an outbound travel agent (i.e. the agent brought in the client), we might give them between a 3%–7% commission at most. This would ensure the Visitor Center a 10% profit, which is already a pretty low margin. This amount may be set in advance or determined on a case by case basis, depending on the type of relationship and volume generated by each travel agent.

SECTION IX: Office Tools

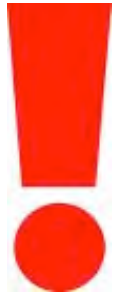
Learning Objective:

After this lesson, Sales Representatives will be able to:

- Identify various technological office tools
- Learn how to use these tools to organize the Reservations and Sales Operation
- Identify some ways in which to promote our product through our company website

Technology has come to represent a workplace's best friend, when utilized to our advantage. A business that makes good use of its technology is regarded as reliable by its clients. Some basic technological tools include a well designed and automated website, an efficient telephone answering system, and a secure and simple method of payment. Doing business through old-fashioned tools such as a fax machine or an answering machine whose memory runs out may easily send a client off!

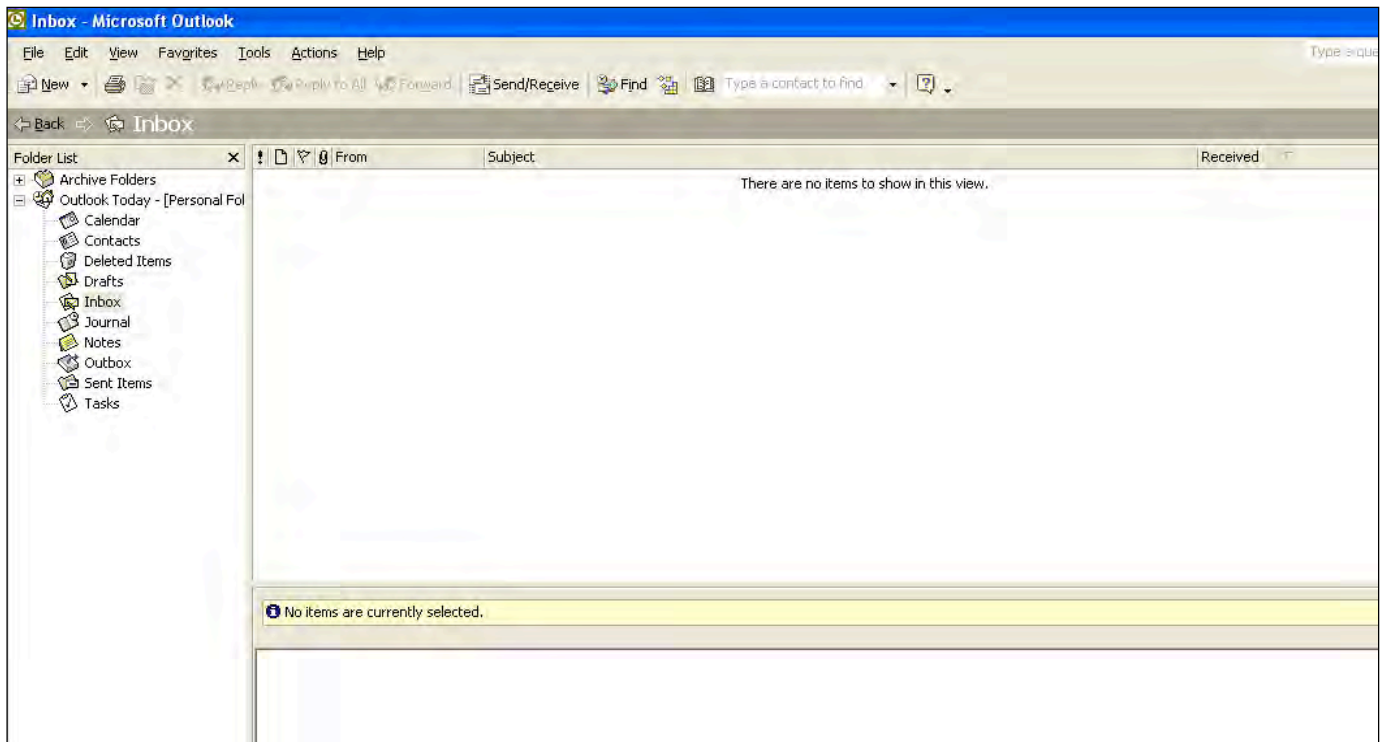
BEWARE! although these can be valuable tools, in remote locations the internet can go down and computers may break-down so be sure to back-up your system daily (emails, documents, etc) since you are liable for all the financial records and reservations stored there.



Using Microsoft Outlook as a Reservations System:

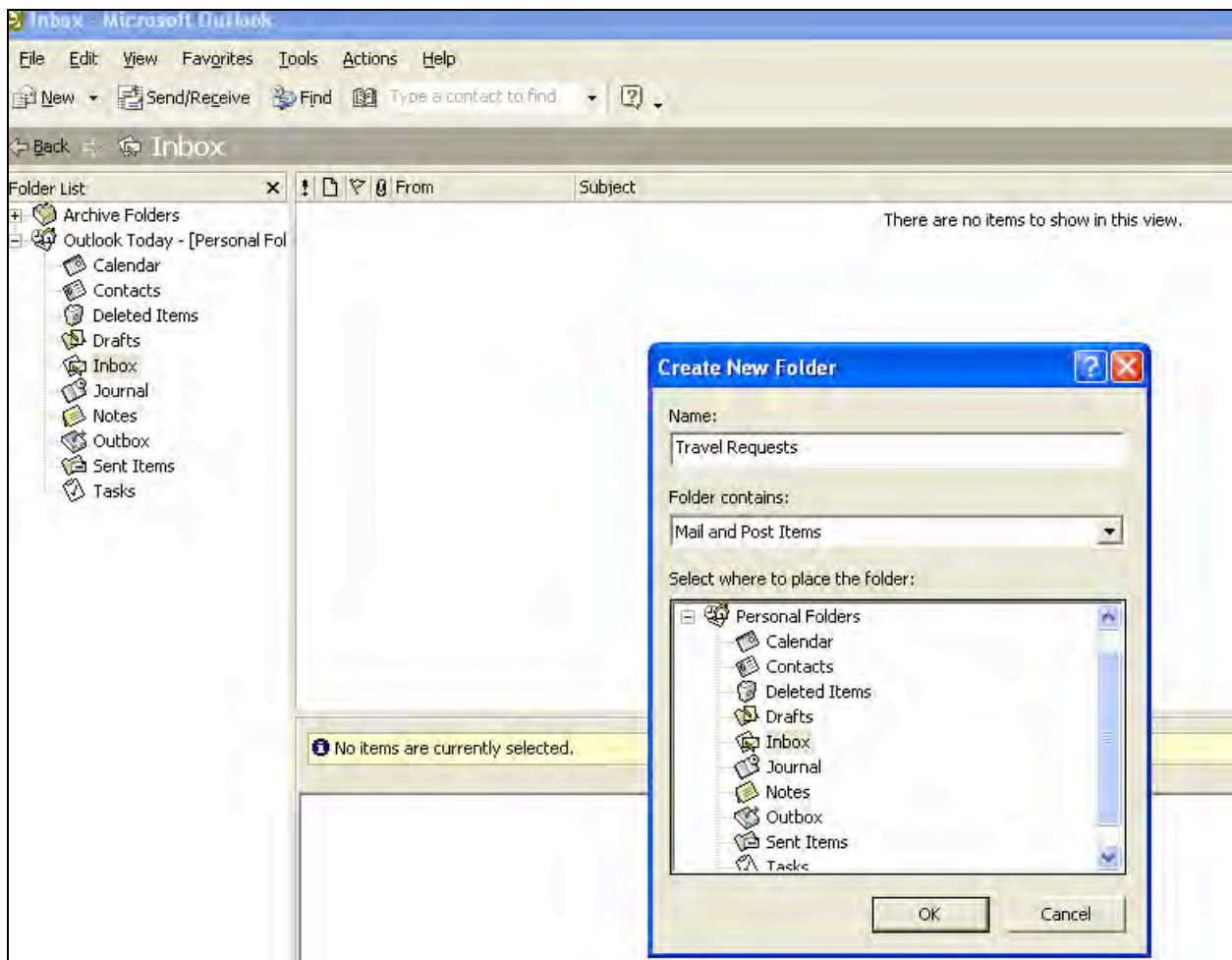
A. Create Folders in your Outlook e-mail account to organize client requests and bookings.

Step 1: Go to your E-mail Inbox. On the left hand column you will find a Folder List that contains Outlook standard folders as follows:



Step 2: Right click on *Inbox* and select *New Folder* to create the folders you will categorize your day to day e-mails. For example, type Travel Requests to file all received e-mail messages pertaining to travel enquiries and requests.

Tip: Because the list organizes folders in alphabetical order, you may type in a number before the folder name to organize them in a logical order.



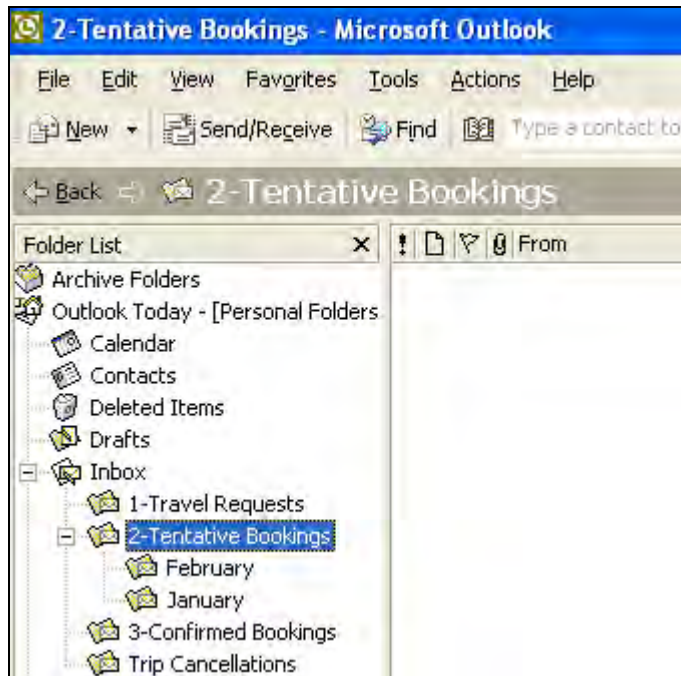
Step 3: You may then further organize the new folders into any other category you may find useful, such as by Client Name or Travel Months. Here are some folder suggestions for your consideration:

- **Travel requests:** File all initial booking requests received via e-mail to be able to follow-up accordingly and track their progress.
- **Tentative Bookings:** Once client has replied back to your initial proposal and trip reservations are being negotiated, a client may be filed as *tentative*.

- **Confirmed Bookings:** File clients as Confirmed once they have agreed to move forward with their travel reservations and paid their trip deposit.

Tip: Confirmed trips may be further organized into months of the year, Client names and Paid/Unpaid Bookings to keep better track of necessary follow-up activities prior to a client's arrival.

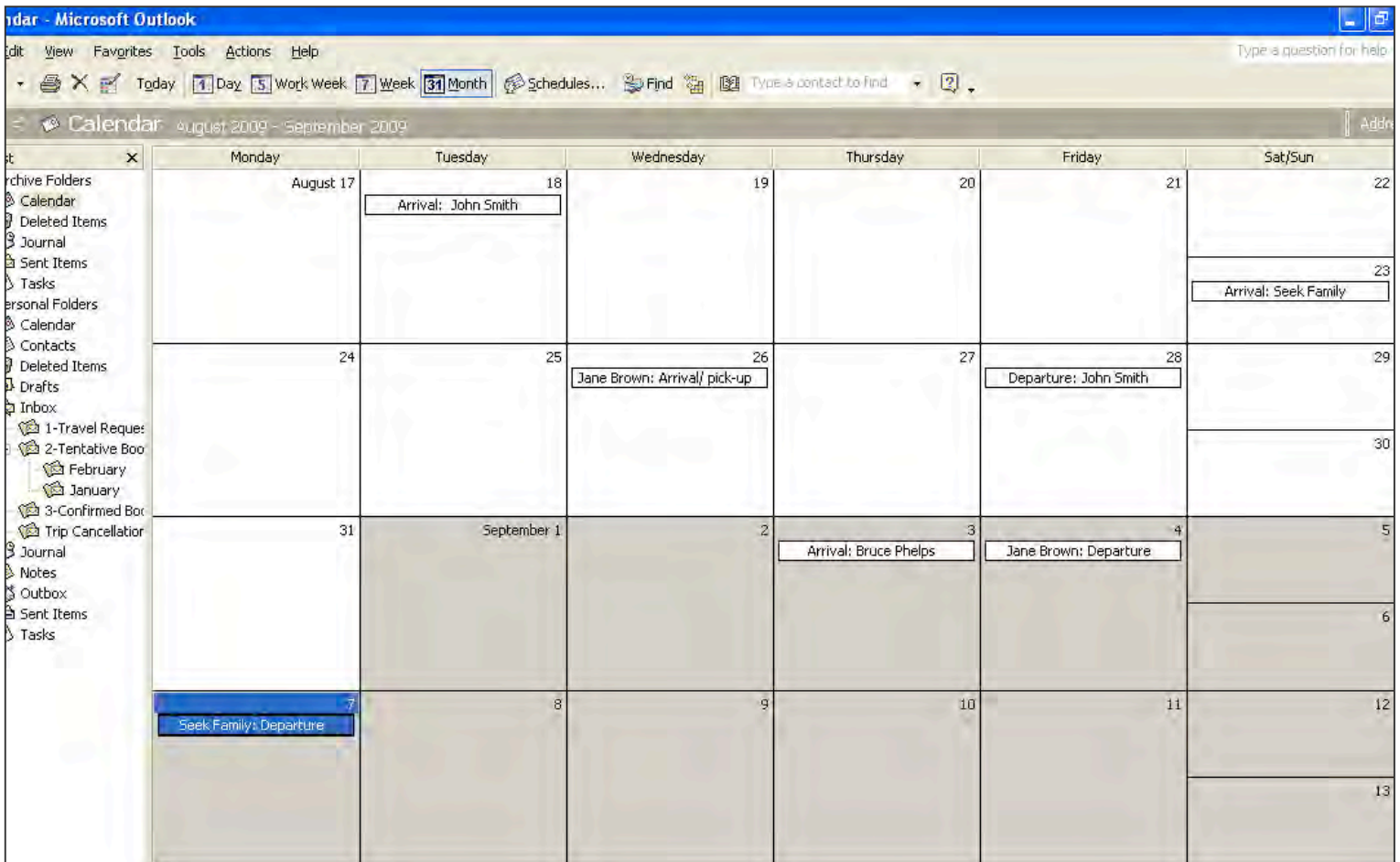
Once you have created the folders you want, these will appear on the left hand Folder List column as follows:



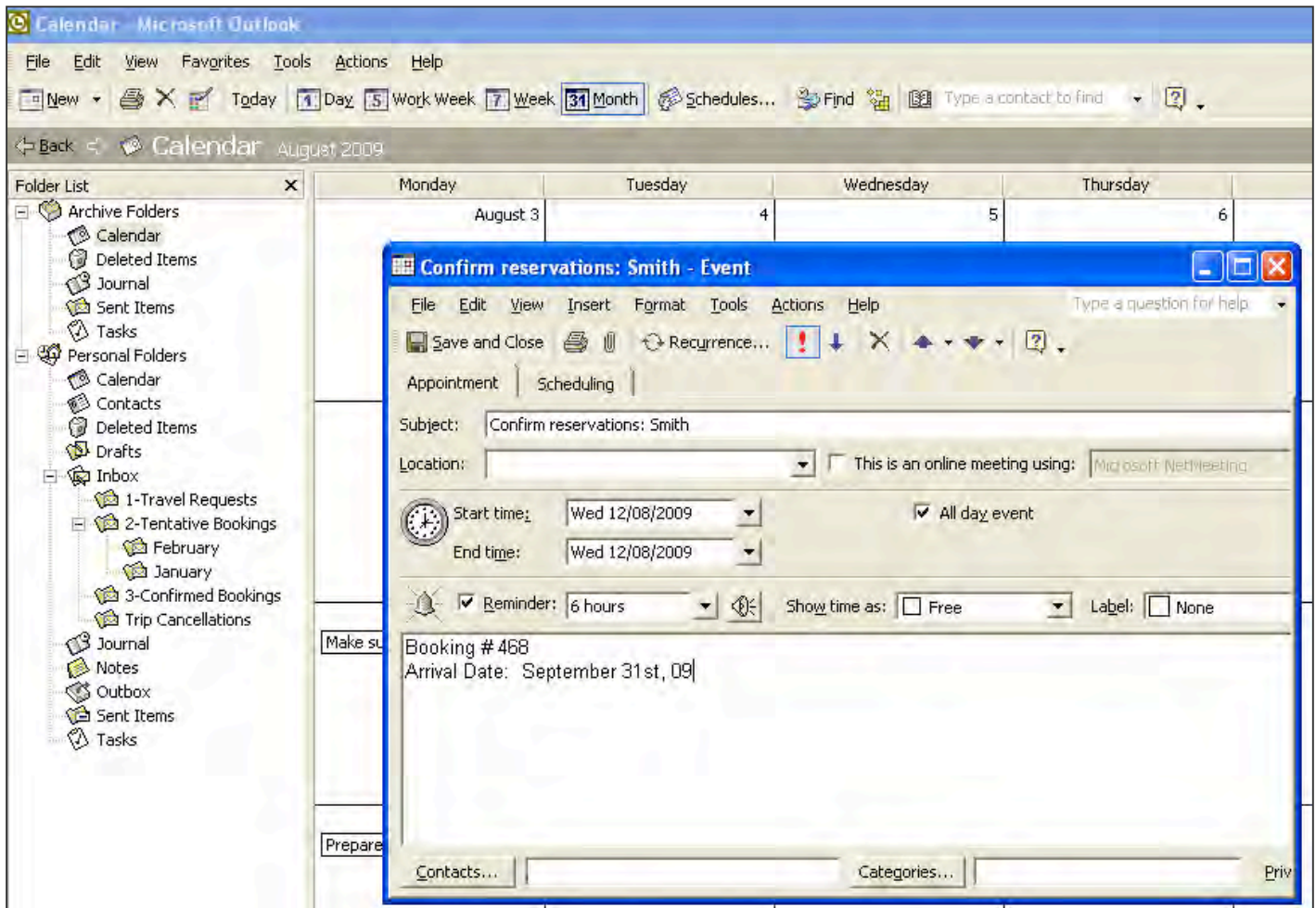
B. Utilize Outlook Calendar and Tasks to keep track of all activities required to plan a travel itinerary (or day tours) from start to end.

1. Start by adding all Confirmed Bookings to your calendar by **client's name** and **arrival date**.

Step 1: In your Microsoft Outlook you will find Personal Folders on the left hand column. Click on Calendar to set up your calendar. On the upper toolbar, you may see view options for your calendar (Work Week, 7 Day week, Month, etc.). For a full month's view, you may click on Month.



Step 2: Click on the date where you would like to create a new activity for yourself. You may type in a short activity phrase or reminder. If you double click on the date, a box will appear where you may type in more specific information regarding the activity, ask to be reminded, etc.

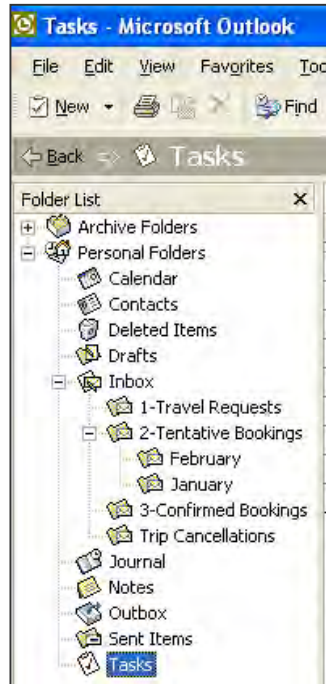


2. Create Tasks: Generate activities and follow-up tasks that relate to each Client or Confirmed Booking. You may set yourself a set list of To-Do's between the time a client confirms their travel arrangements all the way through their departure. These activity tasks may include:

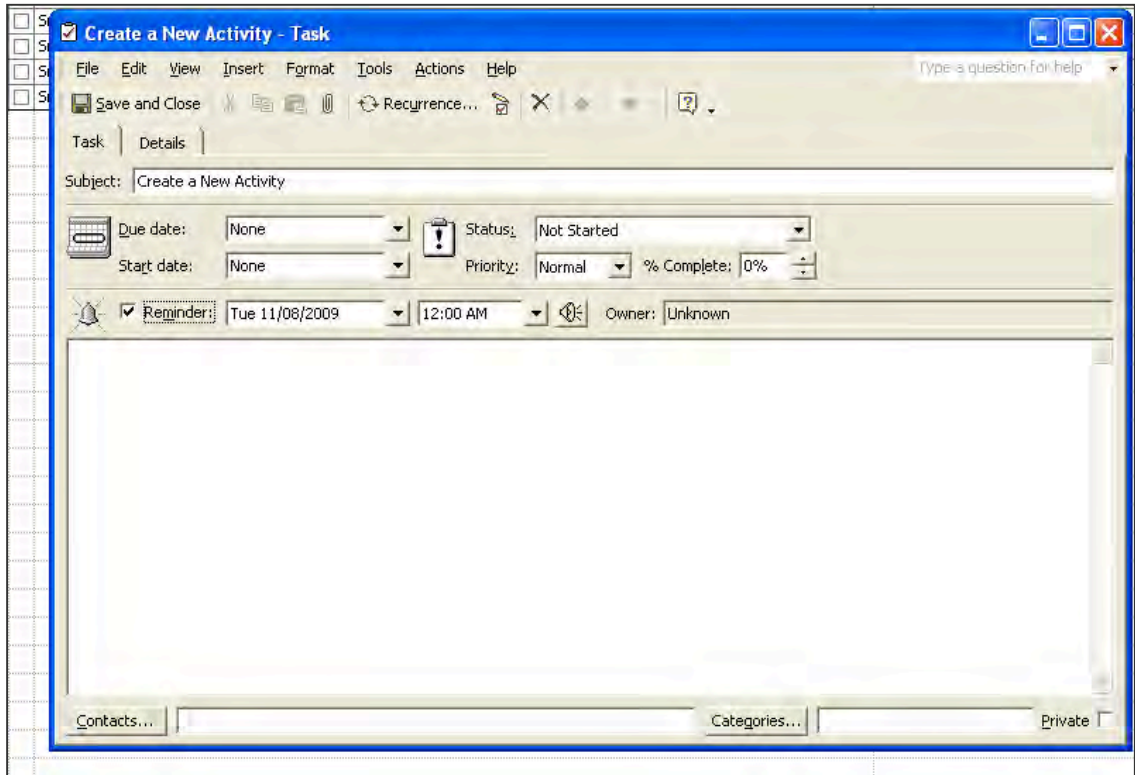
- Send client Travel Agreement and approved final itinerary
- Send out reservations to Suppliers
- Billing/Invoice reminders
- Send list of packing suggestions and other necessary information before traveling to destination

- Supplier payment due dates
- Re-confirm reservations with Suppliers
- Prepare client's welcome package
- Welcome Call to client upon arrival
- E-mail Post-trip follow-up and Survey

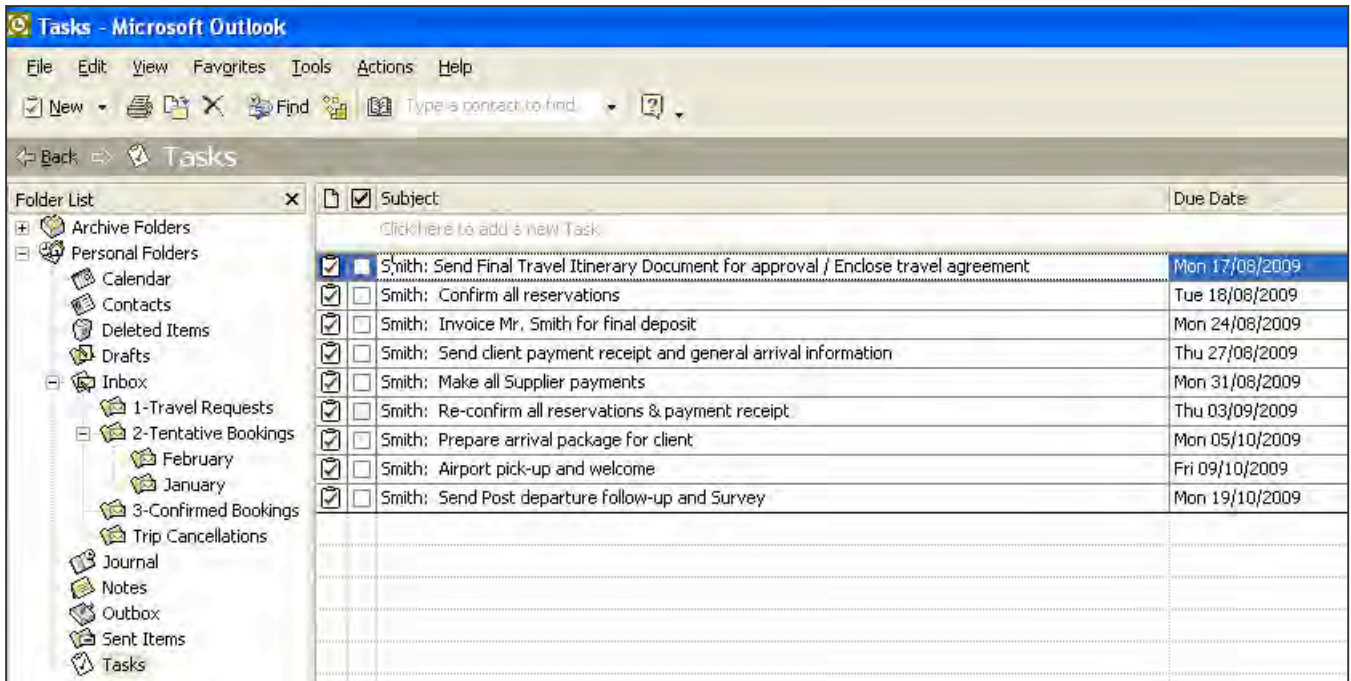
Step 1: On the Folder List (left hand column), click on Tasks.



Step 2: Click on *New* on the upper toolbar to create a new task. Type in the activity you would like to create next to Subject. You may assign a due Date, a start date as well as a reminder before it's due. You may also assign this task to someone else in your office if applicable.



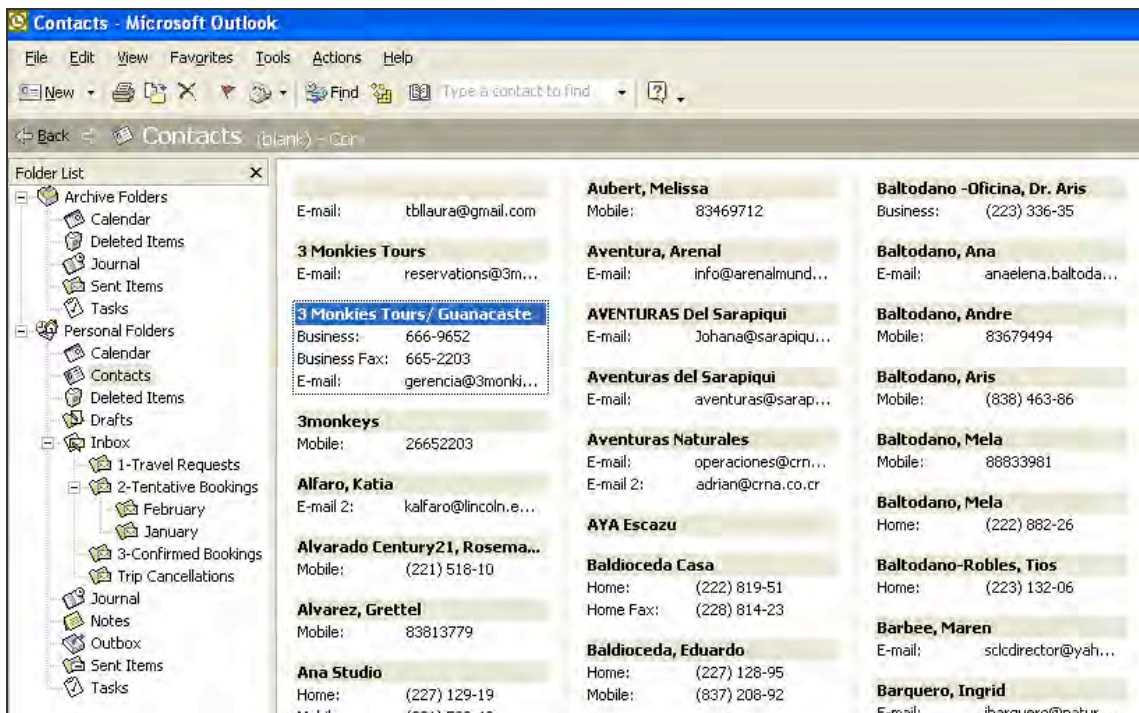
Step 3: Click Save and Close for the assigned task to appear on your Task List.



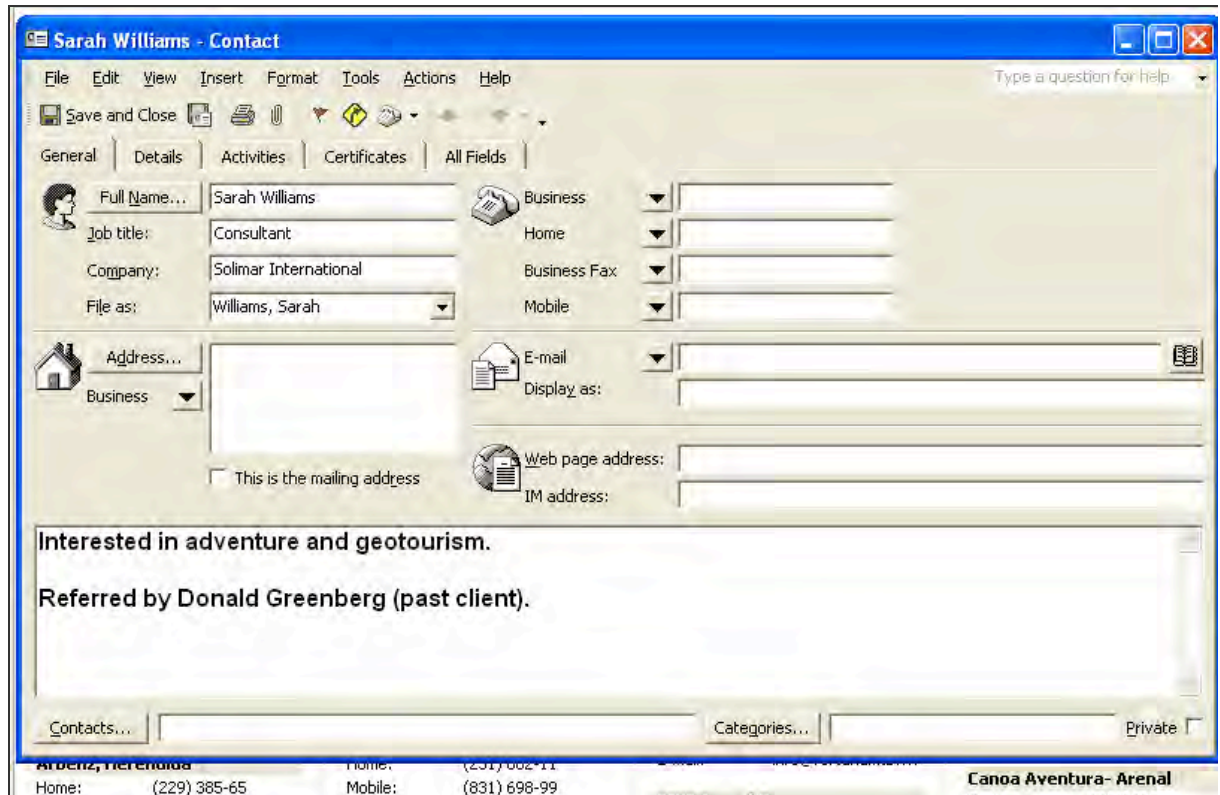
C. Customize your Address Book by creating a list of Contacts: With this feature, you may add each of your new customers to your Contact/Address Book. By completing as much information as possible (i.e. phone numbers, mailing address, number of family members, etc.) you may later generate a solid client database which will be useful in sending periodic updates and promotions.

1. Create your Contact List

Step 1: On Outlook's Folder List (left hand column), click on Contacts. This folder is found under Personal Folders. The example below displays all existing contacts in alphabetical order.

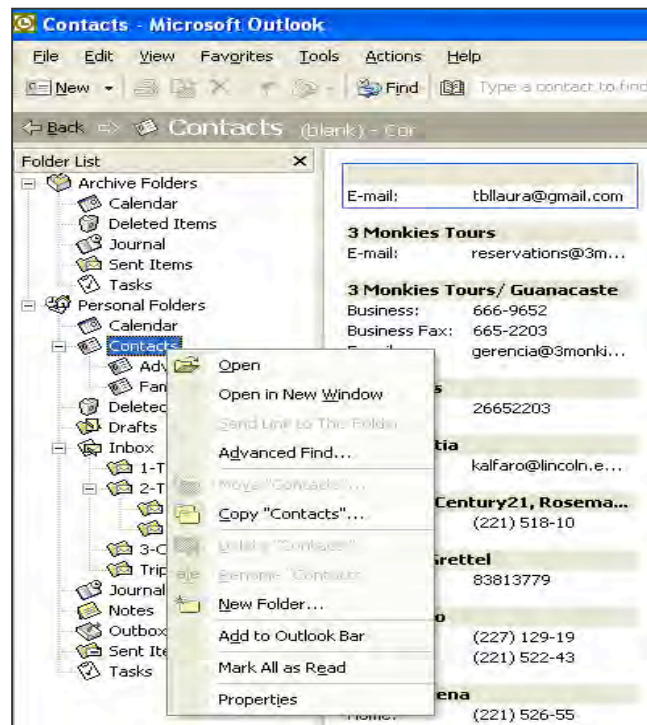


Step 2: To create a **new contact**, click on New on the upper toolbar option. Type in the client or supplier name, along with any relevant information that might be useful in the future.



2. Create folder categories to organize your Vendors (Suppliers) into specific types

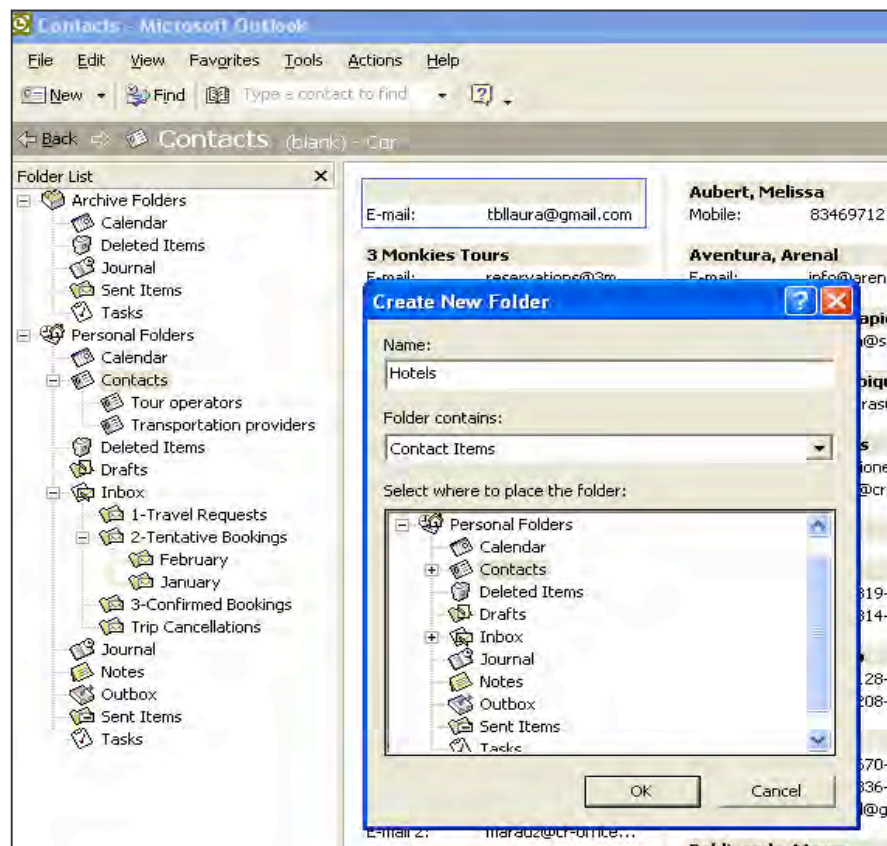
Step 1: On the left hand column right click on **Contacts** and click on *New Folder*.



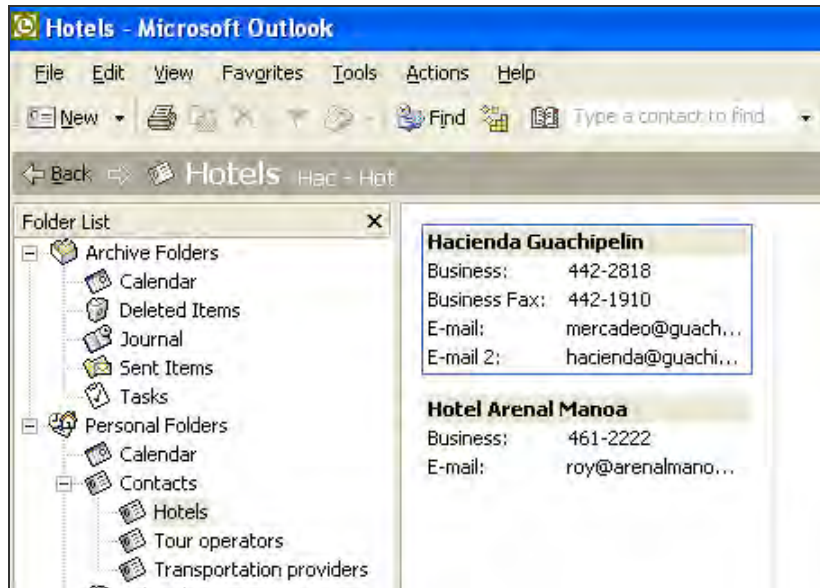
Step 2: Type in a name for the folder you would like to create. You may create the categories both for your clients as well as for your vendors or tour providers. Some suggested vendor categories are:

- Transportation providers (Airlines, car rental, private drivers)
- Tour operators
- Hotels
- Local tour guides
- Other

Tip: With the client categories you create, you may later e-mail periodic travel offers and promotions to your contact list designed for each specific group.



Step 3: You may now categorize your contacts into the folders you created to make it easier to locate different types of vendors. Click on the contact you want to file and drag it into the folder where it belongs. For example, you may click on a hotel contact from your general contact list (previously created) and drag and drop into the “Hotels” folder. **Tip:** You may do the same for clients you would like to categorize into specific types, such as Family Travel, Adventure Travel, Singles, Birdwatchers, etc.)



D. Reply to client requests via E-mail

Most of the communication that goes on between a Travel Representative and a Client occurs via e-mail. We should always do our best to personalize each e-mail message as much as time permits; in other words, avoid making our clients feel as though they are talking to an automated e-mail service.

Using Document Templates

Templates allow us to keep certain information that has been previously edited and formatted on hand. This allows us to invest our time in designing a creative travel itinerary and preparing a quote as quickly as possible. Document templates should be created in Word format and copy/pasted into the body of our reply e-mail each time we need them. In some cases where the document is too lengthy to include within the e-mail message or requires special formatting, the template may be e-mailed as an attachment.

Pay careful attention to the following guidelines for working with templates:

- ✓ Try to include the template text within the body of the e-mail message as much as possible.
- ✓ In cases where a document is attached to the e-mail message, **follow-up with your client via telephone** a few hours later to ensure they received the e-mail message and attachment. E-mails containing attachments are very often sent into SPAM mail boxes, depending on the user's server set-up. This could delay the entire sales process by several days, resulting in a lost sale.

Tip: Lower fare international phone call options include Skype, VoIP or a pre-paid calling card. Set up the phone method that best aligns with your office's specific resources in advance.

- ✓ Make sure you customize the template to each specific client. For example, address the client by their name and make necessary adjustments to reflect the

client's specific request. Try to add in a closing line that tells the client you care, such as: "Congratulations again on your engagement!".

The following templates are recommended:

Client Templates:

1. Initial contact reply (See page 22)
2. Travel Itinerary Proposal & Quote (See pages 24-25)
3. List of Optional tours in Bocas del Toro *or destination* (See Annex 1)
4. General information about Bocas del Toro *or destination* (climate, currency, dress attire, taxes, immunization, etc.) (See Annex 2)
5. Booking Travel Agreement (See Annex 3)
6. Post trip follow-up e-mail and Survey (See Annex 4)

Supplier Templates:

1. Reservation request to Supplier (See Annex 5)
2. Supplier Payment slip (See Annex 6)

Auto-responder messages:

Auto-responder messages are set-up in order to let our clients know their message or request has been received. These are automatic replies that may be sent both from our office website as well as our personal e-mail. Outlook offers different tools for setting up auto-responders from your e-mail account. This varies from version to version so please consult your Outlook Help for instructions on setting this up.

1. Online message request receipt:

Must be sent upon receipt of web-generated request to let client know their request has been processed and someone will be replying within the next 24 hours during weekdays or by the next business day (in case message is received outside of office coverage or on weekends).

Example:

Thank you for contacting Bocas del Toro Undiscovered to help plan your customized travel experience!

Based on the information you shared with us we will design a suggested travel itinerary for your review. We will modify this proposal as needed based on your observations and feedback. One of our specialized travel consultants will contact you within the next 24 hours to begin planning your upcoming vacation! Please feel free to reach us at 1-800- 234-456.

2. Out of office message:

This needs to be set during special Holidays when the office plans on being closed due to a National holiday, meeting or off time.

Example:

Thank you for contacting Bocas del Toro Undiscovered! Our office is currently closed due to a National Holiday and will open again on Monday May 3rd. We thank you for your understanding and promise to contact you immediately upon our return!

In the meantime, please feel free to visit our website www.bocasdeltoroundiscovered.com for general information on Bocas del Toro and the services we provide.

Sincerely,
Xxx
Travel Consultant

Using our DMC Website as a Sales and Marketing tool

Aside from providing information that describes your business and the services you offer, a website should do more than just inform. Firstly, *it must invite visitors to take some form of action*; this could be filling out a form to request further information or requesting to book a specific service. Secondly, *a website should also communicate important news about your product, special offers and services you would like to up sell.*

The following documents or components should make up your agency website:

- 1. Online reservation request form:** Allows us to obtain full client profile, indicate their interests, needs and preferences. This will generate an automatic request that will be directed to a specific office Inbox.
- 2. FAQ Sheet:** One-two page sheet containing answers to clients' frequently asked questions as a way for them to learn more about us and the type of services we offer. Sheet should answer the following:
 - Who we are?
 - What we do?
 - What distinguishes Bocas del Toro's people?
 - Must see attractions found in Bocas del Toro
 - How will my trip reservations aid in the conservation of Bocas del Toro's natural resources and community's development?
 - What climatic conditions may visitors expect at Bocas? How will the weather affect certain activities?
 - Is a Visa required for entry into Panama?
 - Am I required to get any immunizations before I travel to Panama?
 - Packing suggestions
 - Tipping recommendations
 - Safety recommendations
 - Country departure tax

3. **Display travel discounts and promotions:** Home page banners allow us to capture visitors' attention by displaying special discounts, holiday promotions, etc.
4. **Display client / local newspaper reviews:** Section displays up-to-date trip reviews as a means of building a good reputation and assuring potential clients of our level of service. We may also include local paper or magazine reviews about our DMC.

SECTION X: Processing Booking Transactions

Learning Objective:

Sales Representatives will be able to create a legal document that binds the travel agreement between the Agency and the Client. At the same time, Representatives will learn to identify three different methods of payment they may offer their Clients or Buyers.

Once a client has agreed to purchase a specific travel itinerary or list of tours, they must sign an agreement committing to certain conditions. This document must be specific and thorough to avoid future conflict that may arise from a lack of clear communication between the service provider and the buyer or client.

Drafting a Travel Agreement or Contract between Agency and Client

The following sections must be included as part of any travel agreement:
(See *Annex 6: Travel Agreement Template*)

A. Method of Reservations

1. Booking confirmation statement:
Briefly begin the contract by stating the reservations process utilized by the agency:
 - Client accepts the attached travel proposal or list of services
 - Reservations are sent to supplier
 - Client is billed a determined deposit
 - Reservations are confirmed and guaranteed if and when payment is received.
2. Client details:
Include the client's personal information: Name (s), Mailing address, Phone number, E-mail, Medical information, Dietary needs/preferences, other contact and signature.

B. Method of Payment

1. Describe a Payment Schedule:
List the total package price along with specific dates in which client needs to send payment prior to their arrival. A common practice is ask for a 50% deposit at the time of booking and the remaining amount 45 to 30 days prior to arrival date.

In cases where clients ask to spread out their balance in more than two payments, you could divide the balance into more installments as needed. In cases where a client books a year in advance, the initial deposit amount could be lowered to 25-30%.

2. Describe the 3 different methods of Payment for buyer to choose from:

- Wire-transfer: Provide bank account information for overseas transfers. Walk-ins may pay in cash at the Tourist Information Center.
- Credit card: Provide space for all the credit card details required by your local bank. Explain how their credit card transaction will be processed securely via Paypal.
- Direct payment to suppliers utilizing a credit card as collateral: Buyers may pay certain travel providers/suppliers directly at the time of their reservation in cases where there is a prior agreement. In such cases, the supplier would honor a commission amount to be paid to the agency once the service is delivered.

C. Cancellation Policy and Refunds

Trip cancellations – either partial or total- may become an important cause for conflict with clients. For this reason, this section of the agreement must be written in a clear and specific style. If possible, have a lawyer give a final ok to this section to ensure its content is really applicable.

Keep in mind you must take into account your Suppliers' contracts before committing to anything that could go against their policy!

Include a short description about what the consequences are for the client, as well as what you as a Travel Provider commit to, for each of the following scenarios:

1. Trip cancellation:

A client wants to cancel their entire travel arrangements after full payment has been received. Common reasons could be an accident, death in the family or other health issues. The client is usually able to re-schedule their travel dates for future.

In cases where the cancellation occurs more than a month away from their travel dates (and outside of peak season), try to be flexible in working with the client to re-schedule the trip. If within a month of travel, try to obtain as much of a refund from your Suppliers or have them issue a credit for future use.

2. In-country Cancellations (partial services):

This instance occurs when clients cancel one of more services once they arrive at the destination. Common causes are their hotel or hotel room did not meet their expectations, they were unable to go on a day tour due to sickness or injury. Make sure you state if and when a client might be able to obtain a partial refund for such cancellations, *based on the service provider's own policy*.

3. No-shows:

This occurs when a client does not show up at the time and place they were supposed to, in order to go on a determined tour or activity, without previous notice. No-shows are non-refundable in most cases.

D. Travel Insurance (Optional)

Include a short paragraph suggesting your client to purchase travel insurance to protect themselves from incidents that would cause them to cancel their travel plans. You could include a suggested provider you may have made contact with previously. In cases where you establish an alliance with an Insurance Provider, you could purchase the insurance for your client directly, and obtain a commission from the provider.

Booking Methods of Payment

The negotiation between a Client and the Agency or DMC may only be completed until partial or full payment is received. Thus, once a client is ready to sign a Travel Agreement, they will need to choose their preferred method of payment.

To allow buyers more flexibility, the DMC may offer the previously mentioned methods of payment to guarantee the Client's travel plans or reservations:

a. Wire Transfer:

Clients may deposit or wire the amount due directly into the agency's bank account. Banks usually charge a commission for this type of transaction, so it is important to make the client aware of this to avoid conflict. **Tip:** *Kindly ask your client to e-mail or fax over a deposit slip or transaction number to verify the deposit has been made.*

b. Secure online payment (Credit card)

A website user or client who booked their trip via E-mail may purchase the quoted products and services in full using a secure online payment method. This may be done through a payment provider such as *Paypal* which handles credit card transactions securely for a determined fee.

c. Direct payment:

The third method will allow users to make a reservation for services making the payment directly to the supplier at the time of product delivery. In this case the DMC will create the reservation on behalf of the traveler and then invoice the supplier at the end of each month for commissions that are due.

d. Cash payment:

A person walking up to the tourism information center may pay the full amount due in cash. This would usually occur whenever clients purchase one or more day tours or services, where the amount is not as high. In this case, the DMC would pay the net rate (discount rate) to the supplier prior to the confirmed service date. Walk-in clients could also pay by credit card, using the *Paypal* method.

SECTION XI: Conflict Resolution

Learning Objective:

After this lesson, Representatives will be able to apply effective techniques for resolving client conflicts in a peaceful manner.

Planning a travel package involves several players in whom both the Client, and you as a Travel Planner, must place their trust. It is often for this reason that conflicts arise either during the actual travel program or after it is completed.

Consider some synonyms for the word *conflict*:

- Disagreement
- Difference
- Argument
- Inconsistency



So while we must give a client conflict the importance it deserves, a disagreement or difference is certainly not something to fear.

Time is of the essence...

Resolving a difference or argument as quickly as possible will avoid it from becoming a bigger and real problem. Thus, set everything aside and direct all your energy towards both finding a solution to the conflict and making your client happy. Use the following procedures to resolve any type of disagreement between you and your client:

Dealing with complaints over e-mail

- Carefully read** the message prior to reacting
- Obtain as much information as possible** from the supplier or person responsible for client's grievance before replying
- If possible, **call the client to clear up any confusion** there might be and offer your personal apology for the inconvenience; otherwise, you may e-mail an apology or explanation letter using the following guidelines:



Guidelines to draft a Resolution or Apology letter:

- Use an empathetic tone
- Apologize for the client's inconvenience on behalf of the agency as well as the Supplier (in case it was a Supplier who was at fault)
- Concisely detail what you were able to find out regarding client's complaint

- Offer a solution or compensation whenever valid. In case the client's complaint is unfounded, offer a detailed explanation with facts and company policies that back-up your point of view. Even if this is the case, let your client know you are sorry for their inconvenience or mishap.
- Explain how you plan on avoiding this event from happening in the future
- *Thank client* for their trust and understanding

d. **Take action** based on the solution or compensation you promised your client.

e. **Follow-up with your client** to ensure they are content with the action taken.

Dealing with complaints over the phone



a. **Listen** attentively until client is through venting

b. **Repeat** what client is telling you in your own words (paraphrase) and ask whether what you said is accurate

c. **Offer a sincere apology** for client's inconvenience

d. **Assure client that you will further look into situation** and will follow-up with a phone call or e-mail as soon as you are able to offer a solution (wherever applicable).

e. **Follow-up with solution**, compensation or apology depending on the situation. (See above: **Guidelines to draft an apology letter**).

f. **Follow-up to ensure your client is satisfied** with solution and thank him for his/her business

SECTION XII: Creating an Alliance with Suppliers

Learning Objective:

After this lesson, Representatives will learn how to establish a professional working relationship with Tour Providers and Suppliers.

A travel provider is as good as the product it has to offer. As seen previously, **a Travel Provider's product consists of two main components:**

1. The list of services it offers: hotels, tours, activities, transportation, special amenities, etc.
2. The added value you create for your clients through the Customer Service you provide.

To define the first component we must first develop an agreement with the Suppliers or Vendors who operate these services directly. An Agency or Destination Management Company then acts more or less as these Vendors' outside sales representative.

The agency is essentially selling the same product; in exchange, the Supplier agrees to pay them a percentage of the service's sales price. For this to happen, there needs to be a preliminary agreement between both parties that stipulates certain rules of the game.

The list of Vendors should include:

- Hotels
- Tour operators: nature oriented activities, adventure tours, cultural activities, etc.
- Transportation providers: private drivers, shuttle providers, Car rental agencies
- Private Tour Guides

Establishing a working relationship with your destination's Vendors or Suppliers:

A. Set up an initial meeting to discuss your interest in selling their product

1. This meeting will give you the opportunity to ask important questions about the product, such as room categories or hotel amenities, or a detailed description about a tour.
2. It is also your opportunity to tell them about your agency's client profile and what you look for in the Vendors you choose.
3. Lastly, this meeting helps Agents establish a social or more personal relationship with the Supplier's contact, which comes very handy throughout the reservations process.

B. Sign an Agreement that includes:

1. A reservations procedure that works for both parties:

This should describe the fax number or e-mail where you need to send the Reservation Request, your agency contact and approximate response time.

2. Commission structure:

The Supplier should detail the percentage they are discounting off the service's Rack (published) Rate for your agency. This percentage determines what your profit is for selling their product (s).

Example:	
Hotel Bahia, Double Deluxe room for one night, taxes included:	\$200.00
20% commission (\$200 / 0.8):	<u>-\$ 40.00</u>
Total <i>Net</i> amount due to Hotel Bahia:	\$160.00

Commission payment after the fact...

Some suppliers will allow an Agency to make a reservation for their client, while the Client pays them the Rack Rate directly. In this case, the Supplier would honor a commission which they would pay the Agency once the service has been delivered.

Example:
Agency confirms a reservation for their client. Client pays Hotel Bahia \$200.00 a night upon check-out. Hotel Bahia sends Agency a commission check for \$40.00 per night, depending on the number of nights reserved.

3. Payment procedure:

The Supplier must determine how many days prior to the service date (i.e. a hotel's arrival date, transfer or tour date, etc.) they require full payment from the Agency. A common industry standard is to request payment 15 days prior to the service's start date. During Peak Season, Suppliers may request a partial deposit up to 60 days in advance or full payment 30 days prior to the service date.

It is a common practice for Suppliers to charge Agencies a Net Rate (discounted rate) as opposed to the service's Rack Rate (full price).

Rack Rate Definition:
A Rack rate is a Supplier's published rate to customers; in other words, it is the service's full price which customers would be paying a Supplier (Hotel, tour operator or rental car agency) should they book directly through one.

Net Rate Definition:
Rack Rate or <i>published rate</i> less percentage discount applied to the Agency.

Example:	
Hotel Bahia, Double Deluxe room	
Rack Rate for one night:	\$200.00
Net Rate due to Supplier:	\$160.00

Suppliers must also include what their cancellation terms are in case they don't receive payment on time, as well as their Refund Policy in case you cancel the reservation.

Note: Most Suppliers have a prepared contract or agreement for third parties to sign prior to working with them. For more informal vendors, you might need to ask them to lay out their conditions for you to draft one.

C. Make periodic Site Inspections to ensure a desired quality of service is being met.

Suppliers commonly invite third parties for a Site Inspection or guided tour of their facility. In cases where a hotel is outside the city, it is a common practice for them to invite the agent or specialist to stay for free for a night to try out their services. The same would apply for a day tour or activity. Experiencing a hotel or day tour personally, will turn a Travel consultant or agent into a true specialist on the products they recommend. Furthermore, it will allow them to decide whether it is really a product that aligns with the Agency's vision.

D. Kindly accept office calls or visits by Suppliers to deliver product updates, new pricing or marketing materials.

As previously mentioned, office visits are your opportunity to reinforce a relationship and working friendship with the Supplier's main contact. At the same time, this is an Agent's opportunity to discuss recurring issues with the product they are selling, past client conflicts and comments or suggestions to improve their level of service.

Establishing a Commissions structure with Suppliers

A. What is a commission or discount?

As previously described, a commission is the discount a Vendor authorizes an Agent or Third Party as compensation for selling their product (s).

B. Travel industry commission standards:

Wholesalers: 30% commission

Wholesalers are outbound providers who sell vacation packages (Airfare +hotel + guided tours + transportation) in large volumes, usually aimed at group travel. Wholesalers spend important sums of money on brochures to market their packages well in advance. In addition, they move considerable amounts of travel services. For this reason, Vendors authorize a higher commission; this way they are able to sell their packages at lower rates.

Inbound Tour Operators: 20% commission

Inbound Tour Operators are located within the destination they offer and commonly sell more individualized or customized travel to smaller Groups or FIT's (Free Independent Travelers).

[Outbound Travel Agencies / Independent Travel Agents: 10% commission.](#)

Outbound Travel Agencies or Independent agents sell one or more destinations from abroad. They usually purchase a travel package or list of services through an Inbound Tour Operator / Agency who is more specialized than they are. Their percentage commission is set by each Tour Operator based on their own profit margin and pre-established commission contracts.

C. Negotiating better commissions with Suppliers

Suppliers ultimately decide how much of a commission or discount to allow each of the travel providers they work with. This is often determined by the amount of business you are able to bring them as well as by the relationship an Agency has managed to develop with them.

For the above reason, it is important to keep accurate and up to date sales data for each supplier. A Travel Provider who is able to show a volume increase for a supplier's product over a determined period of time, and/or special marketing efforts towards selling their product, will be in a better position to negotiate better commissions over time.

Here are a couple of ways in which the Agency might prove their marketing efforts:

- The specific hotel or activity is announced on Agency's website
- The service product is packaged as part of a special promotion, tied to other services.
- The Agency is promoting a travel itinerary package geared towards group travel, which may in turn produce larger volumes.

SECTION XIII: How to manage Online Reviews

Learning Objective:

After this lesson, Representatives will identify ways to look for client reviews about their business and the services they provide. Furthermore, they will learn how to address online reviews from their past clients.

An important amount of travelers are used to utilizing web portals such as *Trip Advisor*, before committing to a specific tour operator or hotel during their trip planning. Thus, it is important to be aware about any good and bad comments that refer either to your business or the products you offer.

Staying up to date with what other people have to say about your business will:

1. Allow you to investigate the source of a bad review and take the necessary steps to avoid a similar situation from happening in the future.
2. Prevent you from being caught off guard whenever a new client brings up a negative review they read about; you may have a prepared response to properly address the issue whenever it comes up.
3. Give you the opportunity to contact the client who posted the review to find a way to get him to make it up to him and hopefully have him comment positively on your conflict resolution.

Reputable Travel Portals to keep an eye out for are:

- a. Trip Advisor – www.tripadvisor.com

TripAdvisor® provides recommendations for hotels, resorts, inns, vacations, travel packages, vacation packages, travel guides and lots more. Visitors may compare prices with just one click.

- b. Expedia – www.expedia.com

Expedia delivers consumers everything they need for researching, planning, and purchasing a whole trip. The company provides direct access to one of the broadest selections of travel products and services through its North American Web site, localized versions throughout Europe, and extensive partnerships in Asia. (About Expedia.com)

- c. Kayak – www.kayak.com

Kayak is a travel search engine; in other words they search for travel goods across the Web, provide details on hundreds of options, and then let visitors refine and choose the exact result they want. Kayak then sends them directly to the source to make their purchase.

Guidelines for handling Good and Bad Client Reviews:

1. Personally address client reviews from your post trip surveys to **avoid** having an unhappy client post bad rep about your business altogether by taking the following steps:
 - Thank client for sharing his feedback
 - Empathize and apologize for any legitimate complaint
 - Explain how you will act on their feedback to solve the problem or correct the cause of their dissatisfaction for the future.
 - Provide necessary compensation whenever applicable. Follow-up to make sure the client is content with the action taken.

2. Keep an eye out for past client online reviews by periodically running a search in the above mentioned travel search engines.

3. Take the time to personally thank a client for posting a good review about your business. Make sure you keep him/her posted with your company's News Bulletin or travel specials.

4. Provide clients with a link where they may share their comments online. A simple "Thank you for your kind comments, if you find yourself with a few spare minutes, we'd love it if you could share your feedback here www.reviewsite.com". This will do wonders for increasing the positive reviews of your business.

SECTION XIV: How to generate monthly reports

Learning Objective:

After this lesson, Representatives will learn how to create a monthly report that tracks:

- All travel inquiries, conversions and other sales activities
- Client satisfaction performance
- Website, Marketing and Public Relations activities

Reports help us keep track of a company's overall performance. They allow us to take a closer look at important data such as: total number of inquiries, total number of trips booked, total sales, net profit and specific sales and marketing activities carried out during a specific month. It is important to generate reports that are easy to understand by its different users.

Reports are generally created in Microsoft Excel, which allows us to easily change formats and add in the necessary accounting formulas.

Please follow these general guidelines when creating your Monthly Report

- ✓ Generate the report at the conclusion of the month you would like to report on. For instance, you should create a report for the month of August on September 1st, once August has concluded.
- ✓ Show all sales inquiries or travel leads that were generated between the first and 31st of the month only (See Report Template for Travel Inquiries below).
- ✓ Show all sales activities and conversions (confirmed bookings) that occurred during that particular month. For instance, a lead that was generated during the month of July but actually confirmed or converted in August, must appear on August's monthly report (See Report Template for Travel Conversions).
- ✓ Describe all Marketing Activities and Public Relations projects, demonstrating each activity's progress, follow-up date and/or overall results.
- ✓ Quantify Visitor Satisfaction Surveys by specific areas of customer service which may later be analyzed.
- ✓ Address the report to the BSTA board and Solimar International
- ✓ Try to create a report template that is easy to understand by other people reading it, and utilize the same template month after month. You may create separate spreadsheets or tabs to show different report topics, all within the same excel spreadsheet.
- ✓ Your company's Executive Board or Director may require you to produce quarterly and annual reports; thus, you should be flexible to adjust the report so that it can meet any changing needs of the organization you report to

The Report should provide figures on the following activities:

A. Travel Conversions

This table should include a complete list of those travel leads that were confirmed during the month. Remember, for a booking to be considered a conversion, *there must exist an actual deposit or credit card authorization from the client*. This table would include the following columns:

- a. Client Name: remember to include the main contact's full name as well as the traveling partner's name whenever applicable (this could help us track the booking in case we obtain a future booking under the partner's name)
- b. Client Profile: the client's general characteristics, such as: honeymooners who love adventure, early 40's, birdwatcher, student group, group of singles, etc.
- c. Travel Dates: must show accurate arrival and departure dates
- d. Total number of nights: a client's total length of stay
- e. Total number of passengers /group size: include the number of people traveling as well as children's ages wherever applicable
- f. Sales Channel: where the lead derived from, for example: Direct (through the agency's lead sources directly; through a tour operator or local hotel; through a Wholesaler or outbound Travel Agency, etc.
- g. Type of Inquiry: internet request, e-mail, chat, skype, phone, walk-in, other
- h. Tour Description: a summary of purchased services
- i. Rack Rate: tour or package's total price
- j. Net Rate: tour or package's total price less the agency's discount of commission (where applicable)
- k. Commissions or payouts to a third party, such as another Travel Agency or intermediary
- l. Profit: the booking's net profit (Rack Rate less Net Rate)
- m. Profit Margin: The percentage that results from dividing the trip's Net Profit into its Rack Rate

B. Ongoing Sales Activities

This table may show any sales activities carried out throughout the month, such as:

- a. New agreements signed with Tour Operators or other distribution channels
- b. Sales presentations
- c. Sales calls
- d. Site Inspections

C. Travel Inquiries

Include a new table that displays all sales leads that were generated during the month, regardless of their status (In Process, Confirmed, Lost, etc.). By showing this data, those to whom the report is addressed may analyze things such as where clients are deriving from, their profile, the type of destination or product clients are most interested in and reasons for a lost sale, among others.

This table should include the same columns described above for Travel Conversions, plus the following titles:

- a. Inquiry Status: the status of the travel lead, whether in process, confirmed, lost or cancelled.
- b. Product Interests: what destinations, hotels, tours, products, activities, etc. were requested by the client
- c. Response Time: how long the sales representative took to reply to the initial request (this could be shown in hours to be able to obtain an average for the month)
- d. Booking Progress/ Reason Lost: This column should show notes on the booking's progress, for example: Waiting for reply/ Itinerary revision sent/ Deposit received, waiting for hotel confirmation, etc. The sales representative could also write a short reason why the booking was lost or cancelled whenever applicable.

D. Visitor Satisfaction

Create a new spreadsheet section that is able to quantify your clients' total satisfaction. The figures to show on this table should be obtained from the Post Trip Satisfaction Survey you should be receiving from each of your clients upon completion of their trip. This report section must point out the total number of visitor surveys being analyzed.

It is important to measure their satisfaction both on the **Planning Stage** of their trip as well as on the actual **Travel Program**. In addition, you should measure satisfaction by **areas of customer service** such as:

- a. Trip Planning Stage:
 - o Initial response time
 - o Friendliness
 - o Knowledgeable representative
 - o Did final itinerary meet interests and budget
 - o Pre-departure information
- b. Trip Satisfaction:
 - o Transportation
 - o Lodging
 - o Food & Beverage
 - o Tour Guides
 - o Day tours and activities
 - o Customer service support
 - o Conflict resolution

- o Overall travel experience

E. Marketing and Public Relations

Create a new spreadsheet that describes all marketing related activities for the month. These may be part of an ongoing marketing plan or program, so some of the information might remain the same from one month to the next.

The spreadsheet could include tables to keep track of the following activities:

- Website Activities:** this table would total the website's number of visitors, the amount of time they spent on each page, where they came from (country or state), what the most popular pages are, referring links, etc. (A google web analytics report may be generated by Google and attached as a PDF document).
- Marketing Activities:** show all marketing activities or projects worked on throughout the month. You may summarize each activity by indicating information such as:
 - Activity
 - Description
 - Target Market
 - Person Responsible
 - Due Date
- Public Relations Activities:** this table displays activities related to improving the organization's social network, its local as well as overseas reputation. Some PR activities could deal with:
 - Travel magazine writers
 - Travel awards related to your specific product or industry organizations your company is a member of
 - Local social events to bring in business or for networking purposes

See attached Sample Monthly Report Template (Excel document)

SECTION XIV: Appendix

Documents Templates:

Annex 1:	List of Optional tours in Bocas del Toro <i>or destination</i>	-2-
Annex 2:	General information about Bocas del Toro <i>or destination</i>	-5-
Annex 3:	Booking Travel Agreement	-6-
Annex 4:	Post trip E-mail and Survey	-9-
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Annex 1: Optional Day Tours

Optional Day Tours from San Jose Pricing is valid through 11/30/09

Adventure Combo (One Day)

Departure time: 8:00 a.m. approx

Length: 9 hours

Costa Rica offers different kinds of white water rafting where the adrenaline shoots to the limit and fascinating Canopy tours from the tops of the trees. Now you can enjoy both activities combined in a single tour. Discover the natural wonders of Sarapiquí, a large territory located in the northern part of the country, with crystalline rivers, abundant scenic beauty and towns full of hard-working, friendly people. As we depart from San Jose we cross the Braulio Carrillo National Park arriving at Sarapiquí where both adventure attractions can be enjoyed: the Canopy Tour in the middle of a secondary forest with high altitude trees, followed by lunch, and then Rafting in the waters of the Sarapiquí River.

The Canopy tour lasts one and a half hours as you slide thru the forest from ten cables of different lengths and twelve platforms. Rafting on the Sarapiquí River on class II and class III rapids allows a vibrant scenario for those who wish to enjoy this exciting activity. A group of unexpected rapids combined with slow relaxing stretches along a 9-mile distance will make this an unforgettable experience for birdwatchers and nature lovers alike.

Tour includes: Air-conditioned microbus transportation, naturalist bilingual guide, canopy and white water rafting gear, and lunch.

Per Person Rate: \$102.00 USD

We recommend: Lightweight clothes, insect repellent, comfortable shoes, and an extra change of clothes. For the rafting: swimsuit, water shoes, towel and a change of clothes.

Café Britt / The Coffee Lover's Tour

This comprehensive tour turns coffee enthusiasts into coffee experts!

Begin the day taking a short ride into Heredia's cool hills and visit the historic Tierra Madre wet mill, where coffee has been produced for more than 150 years and milled for a century.

Coffee cherries – yes, coffee is the seed of a fruit – are washed, fermented, sun dried and "peeled". Then, on to the plantation roaster where you'll see how Café Britt turns the raw bean into a rich and aromatic brew. Lunch comes next. You'll love our satisfying and creative variations on old-time Costa Rican favorites. Café Britt's coffee "sommelier" will guide you through an unforgettable session tasting eight different coffees and a surprise coffee-macadamia drink.

Features:

- Tierra Madre wet mill
- Coffee plantation
- Roaster
- Coffee-tasting session with an expert "sommelier"
- Buffet lunch, Don Prospero on site restaurant

Tour only:

Adults: \$47.00 / Children 6 to 11: \$42.00

With transportation:

Adults: \$52.00 / Children 6 to 11: \$47.00

Canopy Tour San Lorenzo (One Day)

Departure Time 9:00 a.m. approx

Length of tour: 7 hours

Definitely an adventure you can't miss. We depart the city towards the mountains that surround the Central Valley, with scenery of spectacular vegetation and extensive coffee plantations, ornamental plants and picturesque typical towns of Costa Rica. As we ascend, we will enjoy the climatic changes of our country. This is an experience that is enjoyed only once, as we slide from one platform to the next flying thru the canopy. Canopy San Lorenzo is located in the middle of a tropical forest reserve in a beautiful area full of orchids, bromeliads and other ornamental plants.

The sliding cable is divided into two parts:

- The forest section, which starts with small cables so the passenger will acquire confidence while admiring the forest's canopy and
- The adventure section, with much longer cables suspended from high platforms that require large doses of adrenaline.

The total length of the cable is 2500 meters or 8.202,10 ft. There are 19 platforms and the San Lorenzo Canopy offers a 750-meter or 2.460,63 feet cable, the longest one in the country. From one platform to the next the guide will explain the most important features of the forest. Finally, after only a short walk, we will have a delicious lunch in the restaurant Gran Vista.

Tour includes: Air-conditioned microbus transportation, naturalist bi-lingual guide, canopy gear, and lunch.

Per person rate: \$81.00 USD.

We recommend: camera, light clothes, comfortable shoes and insect repellent.

Poas Volcano – La Paz Waterfalls Gardens. (One day)

Departure time: 8:00 a.m. approx

Length of tour: 8 hours

We take the Pan-American Highway towards the city of Alajuela. In route we go by the Agriculture Monument, the Monument to Juan Santamaria and the famous Mango Park. As we ascend towards the volcano we stop for a brief explanation on our golden bean, coffee, and then continue our trip through fern, flower and strawberry farms. There is a noticeable change in temperature and vegetation, preparing us for the pleasure of the exuberant cloud forest of Poas Volcano.

At the Volcano we will have time to observe the impressive main crater with its sulfur fumaroles. Then we will hike on a trail to the beautiful Botos Lagoon that will allow us to learn about the different ecosystems in the park.

We will continue our trip towards the Caribbean, stopping to discover La Paz Waterfall Gardens, a natural park where we will walk thru spectacular trails which will take us to White Magic Waterfall, the most spectacular one in the area. Inside the park we will also visit the largest butterfly observatory in the country that houses a collection of tropical jewels and the impressive hummingbird gallery.

Once we have finished our walk we will partake of a delicious lunch buffet and then begin our return trip to San Jose.

Tour includes: Air-conditioned microbus transportation, naturalist bilingual guide, entrance fees and lunch.

Per Person Rate: \$89.00 USD

What to Bring: Hat, Rain jacket/sweater, walking shoes, insect repellent, binoculars and camera.

The Real Coffee Tour /Doka Estate

The main objective of the Coffee Tour is to educate and inform tourists about the process that growing coffee involves. The tour takes you throughout our Doka estate and watermill. Your tour guides are very knowledgeable and full of information that will make the tour a special learning experience. You will hear about the history of the coffee farm, it's owners, it's geographic location, the traditional coffee growing methods, and also the coffee brewing tradition of 'chorrear'. The tour takes you to Almacigo, your first stop, where the process of growing and producing fine coffee is covered from planting the seed to picking the ripened coffee berries.

From here you will visit the 'recibidor' (coffee bean receiver) where you will be shown the first classification of the coffee beans as well as the different brands that are processed on the estate. The oldest working water powered mill in the country (beneficio) is the next stop. You will see the peeling machines, how they work and what we do with the coffee bean skins. The fermentation tanks and their importance in the resulting taste of the coffee follows. The bodega is where we store our coffee and where export ready coffee is kept. You will also visit the sun drying patios and the roasting hall where you will see and smell the different roasts we produce.

Once the tour is concluded you can visit the souvenir store which is chalk full of great coffee and Costa Rican crafts perfect for gifts or home decorations.

Times: 9am, 10am, 11am / 1:30pm, 2:30pm, 3:30pm
Weekends: same except 3:30pm tour
Tour rate: \$16.00 per person

San José City Tour & Shopping

Departure: 8:00 a.m. Morning tour / 1:00 p.m. Afternoon tour
Length of tour: 4 hours

Starting on the East side of San Jose, the first thing we will see is Democracy Plaza and the National Museum, the Courts, Los Yoses, San Pedro Mall, Hispanidad Fountain and the Rodrigo Facio Campus of the University of Costa Rica. After we have seen the capital's main attractions, our first stop will be the impressive Pre-Columbian Gold Museum and the beautiful National Theater where we will have a guided visit through these cultural gems. After our visit, the tour continues thru the western section of San Jose: La Sabana Metropolitan Park, Costa Rican Contemporary Art Museum or the first International Airport in Costa Rica, the National Gymnasium, the Comptroller's office, residential area Rohrmoser, Nunciatura, Nobel Peace prize winner Oscar Arias Sanchez's home, Rohrmoser Boulevard and Pavas section. At the end of the tour, you will have the opportunity of visiting a couple of interesting shopping places where you will be able to buy a souvenir of your visit to San Jose. On Sunday, the National Theater is closed and we will only see it from the outside, instead we will visit the zoo.

Tour includes: Air-conditioned microbus transportation, entrance fees, and bilingual guide.
Per person rate: \$32.00 USD.
We recommend: Camera

Annex 2: General information about Bocas del Toro *or destination*

Company Logo **GENERAL INFORMATION FOR TRAVELING TO COSTA RICA**

Weather in Costa Rica

Costa Rica benefits from an ideal tropical climate. The average temperature is 70°F (21°C) in the highlands and ranges from the high 70's to the low 90's (21 to 28°C) in the lowlands. Costa Rica does not have four defined seasons; its seasons are rather defined by the amount of rainfall during a particular time of year. The rainy season goes from May to November and the dry season lasts from December to April. However, even during the rainy season mornings are often bright and sunny. Temperatures vary little throughout the year; the main influence on temperature is altitude. Always pack an umbrella or raincoat wherever you go, just in case!

Packing Suggestions

- Sunscreen lotion
- Sunglasses
- Hat or Cap
- Insect Repellent
- Swimsuit
- Beach towel
- Sandals, and comfortable hiking / walking shoes
- Binoculars
- Camera
- Raingear (umbrella, raincoat, waterproof shoes)
- Comfortable, light clothes for the beach (shorts, T-shirts, light dresses)
- Comfortable, warm clothes for the mountains (jacket or light sweater, long trousers)
- A small back pack that can be used for day tours
- Your passport along with two photocopies
- Another ID (e.g. drivers license) with your photograph on it
- A Spanish /English (or your mother language) dictionary

Currency

The Costa Rican currency is called Colon. The exchange rate ranges between ¢560-580 colones to a US dollar. US dollars and major credit cards are widely accepted throughout the country. It is a good idea to carry small change and colones for purchasing souvenirs or snacks at more rustic establishments.

Annex 3: Booking Travel Agreement Sample



TRAVEL AGREEMENT

BOOKING PROCEDURE

Once you are ready to proceed with booking, Solimar Travel requires a 50% deposit to guarantee your reservations. Though we constantly check availability of providers throughout the package development process, bookings are not guaranteed until down payments are made to providers. Once we receive the 50% deposit, we make all necessary payments, and bookings are guaranteed. Solimar then requires payment for the remaining balance **45 days prior to departure**.

METHOD OF PAYMENT

We accept checks drawn from a US account or you may also choose to pay by credit card, for which we require that you fill out the credit card authorization form below.

Mailing address:

Solimar Travel
1327 18th Street NW, Suite 320
Washington, DC 20005

TRIP CANCELLATION POLICY

All refunds are subject to individual vendors' cancellation policies and Solimar Travel will make refunds based on the following cancellation policy:

Date of Cancellation	Refund amount
Date of booking to 60 days prior to trip departure	Trip total minus 10% of trip total
59 days to 35 days prior to trip departure	Trip total minus 15% of trip total
34 days to 20 days prior to trip departure	Trip total minus 40% of trip total
19 days to departure date	No refund applies *

*As we are committed to customer service, we will work with our clients to try to reschedule accommodations, transfers and tours whenever possible. In cases where re-scheduling the trip is not an option, we will make our best effort to obtain a refund based on individual vendor policies.

Please be advised that Vendor policies are very strict during Peak Periods and are subject to changes without notice (Semana Santa/Holy Week, Christmas and New Year's).

Solimar Travel will refund your deposit within 2 weeks of your cancellation date whenever applicable.

IN-COUNTRY MODIFICATIONS

We will make every effort to re-schedule a tour or transportation service as long as the client contacts our Solimar Costa Rica office representative directly, within a reasonable time frame that adheres to individual tour providers' modification policies (typically 48 hours in advance of service). Any changes to confirmed services will be subject to a service fee of 15% of the modified service unit price.

"NO-SHOWS" AND IN-COUNTRY CANCELLATIONS

There will be no refunds for unused package hotel and tour services referred to as "no-shows" which include: missed transfers due to airline changes and/or missed flights, unused meals, missed tours or activities of any kind, unused entrance fees, domestic flights and hotel accommodations. Solimar Marketing Inc. is not obliged to guarantee promises (written or verbal) made by local hotel staff, tour guides, or any other persons not under direct employ of Solimar Marketing Inc.

All in-country cancellations must adhere to individual vendors' cancellation policies. In the case of cancellations made within individual vendors' allowed time frame, these are subject to a 40% penalty fee. This includes transfers, tours and lodging. Cancelled Domestic Flights are non-refundable.

TRAVEL PROTECTION & INSURANCE

Travel Insurance is strongly encouraged by Solimar Travel. Personal emergencies affecting your (or your traveling companions') travel plans, which occur after final payment has been made may increase the cost of your trip or even make your delay or cancel your trip all together. Also medical concerns may arise during vacation that your US health insurance may not cover or may even require medical evacuation. We therefore highly recommend the purchase of comprehensive trip insurance.

Solimar Travel has a relationship with Access America Travel Insurance & Assistance (www.accessamerica.com). Access America has a variety of travel insurance products that will cover almost any aspect of travel. This is a separate transaction and must be handled between the insurance agent and the passenger directly. You can purchase travel insurance coverage via their website or you can call them at 1-800-729-6021 or emailing them at service@accessamerica.com.

Please note that all travel insurance must be purchased within 2 weeks of payment of the package from us. Please also review carefully the terms of your policy as many policies are very restrictive and limited to cancellations due to emergencies not related to pre-existing conditions. Also please note that if you fall ill in country, such illness should be certified by a doctor to facilitate insurance payments.

Since purchasing Travel Insurance is a separate transaction between you and the travel insurance company we ask for you to verify that we have suggested that you purchase insurance. If you decide not to purchase the insurance we require that you acknowledge that we recommend the coverage and you decide it against it on your own. We assume that as the lead passenger you are purchasing travel insurance for you and your travel companions or denying the need to purchase this insurance.

I HAVE/ WILL _____ WILL NOT _____ purchase travel insurance.

TRAVEL INFORMATION *(Please fill out this space to guarantee accurate travel arrangements)*

Arrival Date: _____ Airline & Flight number / Time: _____

Departure Date: _____ Airline & flight number / Time: _____

Method of Payment: Check Credit Card

Medical Conditions (if any): _____

Special Dietary Needs (if any): _____

I HAVE READ AND ACCEPT THE ABOVE TERMS & CONDITIONS.

Name: _____ Date: _____

Signature: _____

Mailing Address: _____

Emergency Contact Person: _____

Please fax the above form back to (202) 747 2074

**For Check payments, please mail to:
1327 18th Street NW, Suite 320
Washington, DC 20005**

For Credit Card payments, please complete and fax the attached form along with the above agreement.

CREDIT CARD AUTHORIZATION FORM

Please fill out this document if you choose to pay by Credit Card and and fax it to: **(202) 747 2074**. This document will enable us to guarantee your travel arrangements.

This is to confirm that, in keeping with all applicable laws, I am instructing Solimar Travel to pay and insure travel logistics against the credit card listed below. It is understood that the amount charged does not include or constitute any additional fees related to my acceptance of credit cards as a form of payment, unless permitted by law. I have authorized this transaction and agree to indemnify and hold Solimar Travel harmless with respect to these instructions. It is understood and accepted that to provide additional security for my benefit, Solimar Travel may on my request, verify the Credit Card holder's billing address and may, with my approval, deliver the Tour Confirmation and Travel Documents directly to the mailing or billing address stated below.

CLIENT INFORMATION:

From: _____
Credit card holder's full name as appears on credit card

Mailing Address: _____

City: _____ State: _____ Zip code: _____

Telephone Contacts: (W) _____ (Cell) _____ (H) _____

Billing Address (if different from Mailing Address):

Address: _____

Suite/Apt: _____

City: _____ State: _____ Zip Code: _____

Residential Address: Office Address: Card holder Tel # _____

Number of Adults: _____ **Number of Children if any:** _____ **Ages:** _____

CREDIT CARD INFORMATION:

Credit Card Type: VI / MC / AX / DC

Credit Card #: _____ Expiration Date: _____

Bank Code/Security Code: _____
(3 digit number found on the back or 4 digit number on the front for American Express cards)

Amount to be charged: US\$ _____

Appendix: Document Templates

Credit Card holder's signature

Today's Date: _____/_____/_____

Annex 4: Post Trip Follow-up and Survey

Follow-up e-mail

Dear Bryon and Sarah,

On behalf of Solimar Travel, I would like to thank you for allowing us to take care of your recent vacation plans to Costa Rica! We hope you enjoyed your trip and that everything lived up to your expectations, aside from the obvious weather setback we had during your stay. As you know, we take customer service very seriously at Solimar Travel. We'd be grateful if you could take a few minutes to complete the attached evaluation form so that we can better understand the needs of our customers and continue to improve our customer service.

Now, you are currently on our mailing list to receive our regular newsletter; please advise if you would prefer to be removed.

Thank you once more for trusting us with your travel experience- we hope to serve you or any of your friends in a near future!!

Warm regards,

XXX
Travel Consultant

Post Trip Survey

We hope you enjoyed your trip and that everything lived up to your expectations. As you know, we take customer service and trip satisfaction very seriously at X Travel Company. We'd be grateful if you would take a few minutes to complete a short survey so that we may better understand the needs of our customers and continue to improve our services.

Section 1

On a scale of 1-5 (5 is the highest) please rate your satisfaction with the following elements of your experience traveling with X Travel Company.

1. Solimar's Customer Service during the trip planning process:

Optional Comment:

2. Your customized itinerary based on your interest and budget:

Optional Comment:

3. The Pre-Departure Information

Optional Comment:

4. Arrival at the Airport and Transfer Services:

Optional Comment:

5. Destinations you visited:

Optional Comment:

6. Hotels & Food

Optional Comment:

7. Activities & Tours

Optional Comment:

8. Customer Support during your trip:

Optional Comment:

9. The overall value of your trip:

Optional Comment:

10. Your overall travel experience:

Optional Comment:

Section 2

1. What did you like the most about your travel experience?

2. What did you like the least about your travel experience?

3. How can we improve our services in the future?

Section 3

X Travel Company is committed to supporting sustainable tourism which is defined as tourism that is economically viable, but does not destroy the resources on which the future of tourism will depend, notably the physical environment, and the social fabric of the host community. We make every effort to choose local partners that share this philosophy while also educating our customers about the importance of traveling responsibly.

We would like to ask you the following questions to improve our efforts in supporting sustainable tourism.

1. How familiar were you with the concept of sustainable tourism before this trip?

Very familiar / Somewhat familiar / Not familiar at all

2. Do you feel that your trip supported sustainable tourism?

Yes / No

Explain:

3. Do you have any suggestions on how we can better support sustainable tourism?

Please comment:

Thank you for taking the time to complete this survey. Your feedback is very important to us and will help improve our services. For your next vacation experience we hope that you consider traveling with us. Every day we are developing new undiscovered destinations and we look forward to using our experiences to help you create yours. We also appreciate any referrals that you send our way.

Best regards,

Travel Consultant
Xxx Travel Company

Annex 5: Reservation Request to Supplier

Company Logo

TO:	Hotel Bahia
Dept:	RESERVACIONES
FROM:	<i>Pablo Galarza</i>
Phone:	253-6137/224-0505
Fax:	253-6327

RESERVATION REQUEST

Greetings from your friends at Bocas Tourist Information Center!

Please confirm the following Reservation at your earliest convenience:

CLIENT NAME:
Pax no.: 2 adults, 3 children (11, 8, 3)

REQUESTED SERVICE (s):	Deluxe Suite
-------------------------------	--------------

Date In:	
Date Out:	

Remarks:	_____

Rack Rate:	_____
Net Rate:	_____
Payment Due Date:	_____
BANK ACCOUNT #:	_____

Thank you!!

Annex 6: Supplier Payment Slip

Company Logo

TO:	Hotel Bahia
Dept:	RESERVACIONES
Fax No.:	

PAYMENT DEPOSIT NOTICE

Greetings from your friends at Bocas Tourist Information Center!

Reservation Confirmation #:

Client Name (s):	
Arrival / Departure Date:	
Tour Date:	

Deposit Information:

Net amount paid: _____
Deposit date: _____
Confirmation / Tracking #: _____

Please send a receipt confirming the above deposit and re-confirm this reservation at Vicki@bocas.bsta.com or fax to 2234 -5678, at your earliest convenience.

Thank you!!