Manage Your Corporate Clients

Course Topics

- **How does the Corporate Sales / Account Executive use ClientBase to develop a relationship with potential new clients?**

- Track contacts with potential customers
- Create a Res Card & use Batched Reminders to Manage the LEADS Process
- Create Set of Docs & Emails for Corporate LEADS
- Create “paperless” file of emails, correspondence, etc.

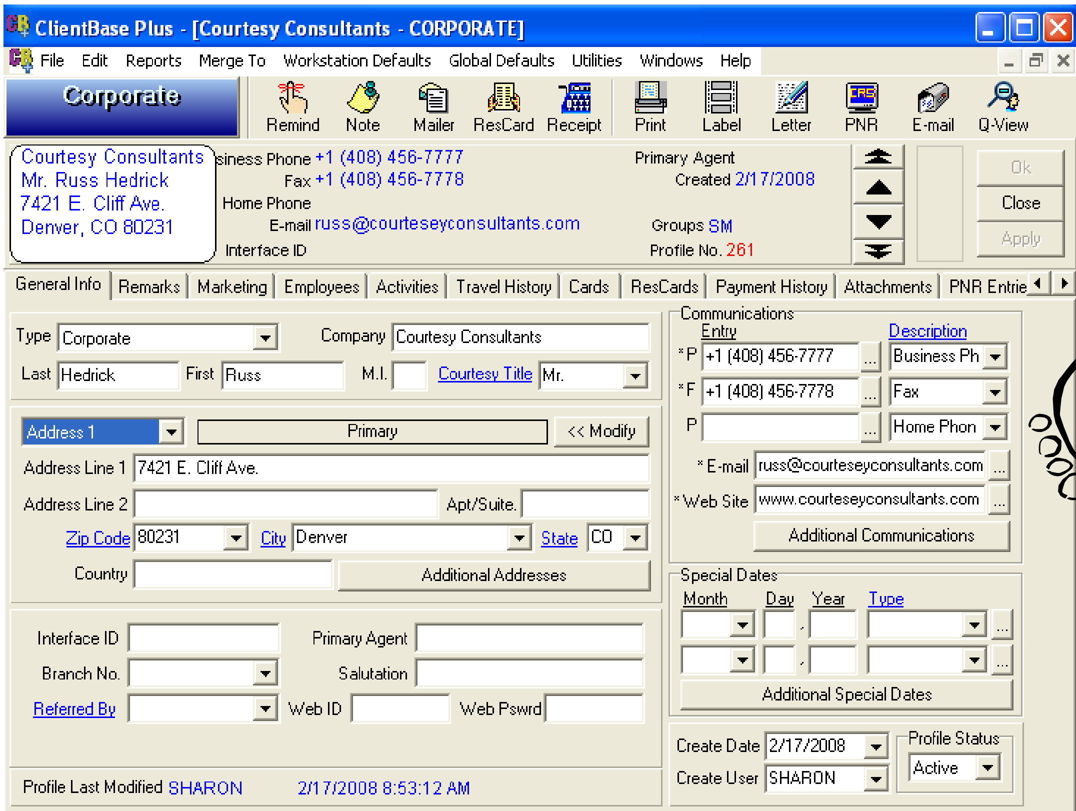
- **How does the Corporate Sales / Account Executive use ClientBase to manage existing or new Corporate relations?**

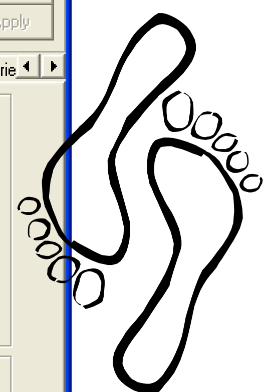
  - Manage New or Existing Corporate Relationships
  - Look for Corporate Bookings
  - Know Your Top 20%
  - Create History of Complaints/Resolutions
  - Additional ClientBase Uses for Corporate Clients

Handling Corporate LEADS

How does the Corporate Sales / Account Executive use ClientBase to develop a relationship with potential new clients?

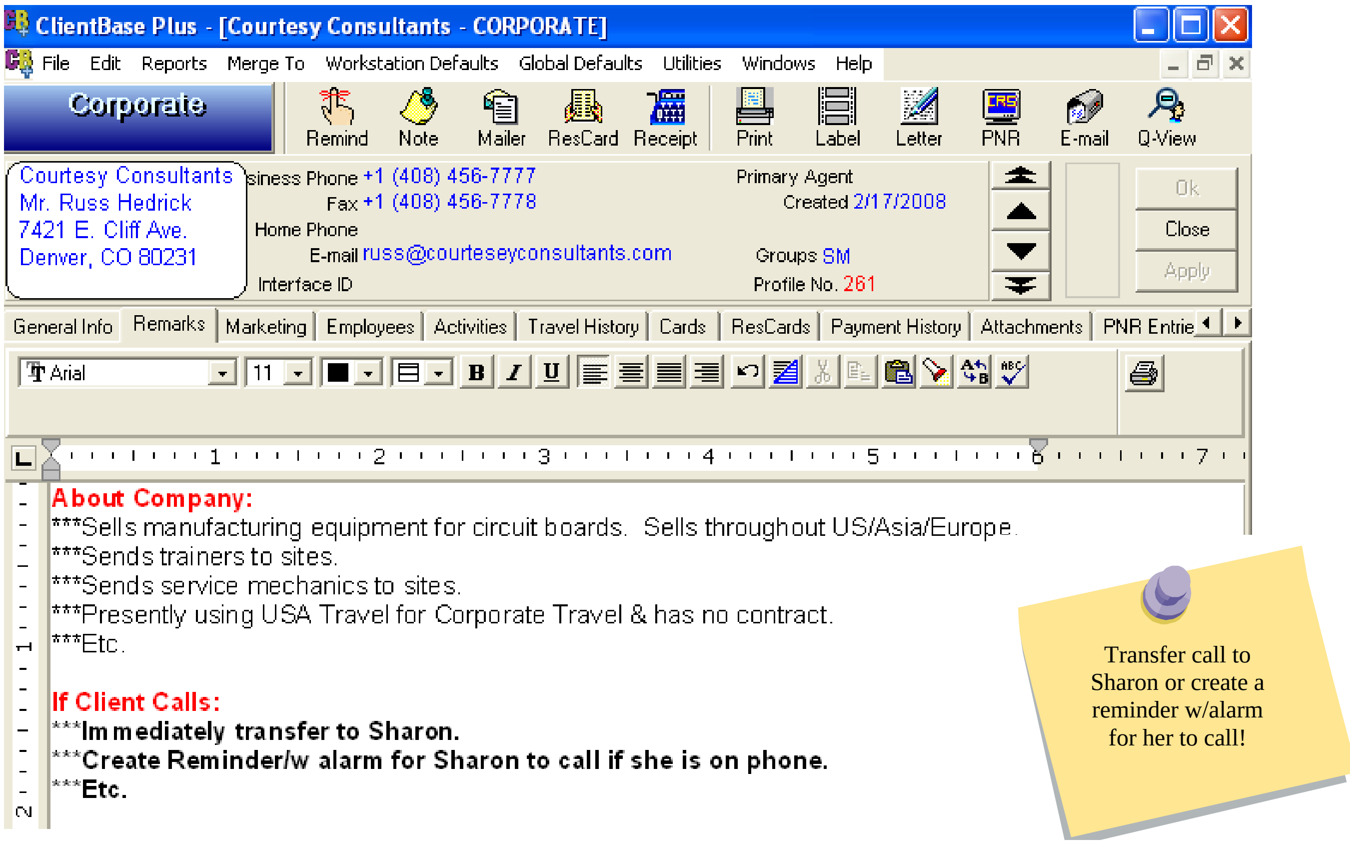
I. TRACK CONTACTS WITH POTENTIAL CLIENTS





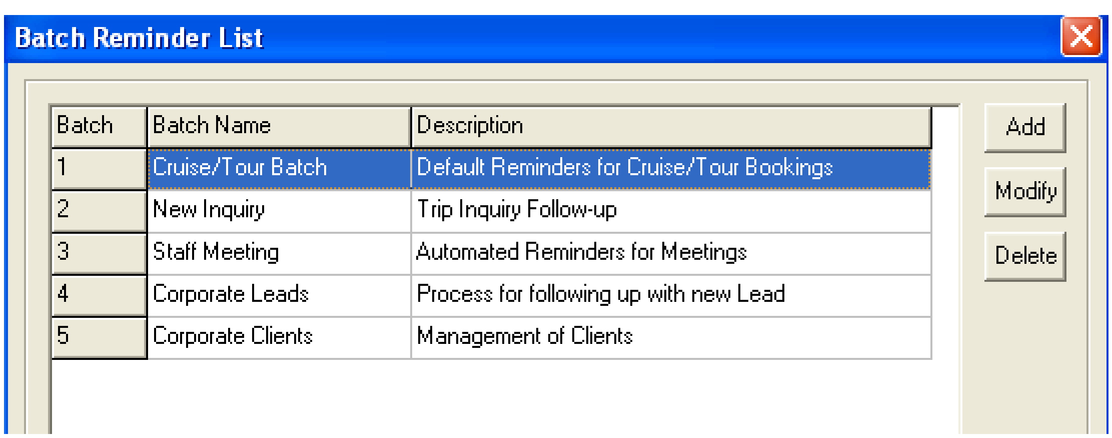
- Create a system for handling LEADS.
- Enter all pertinent information you have learned on your "cold call" or interaction with the LEAD. Main contact? Address, Phone, email, type of company, etc.
- Make sure to capture website so you can learn about everything about company and needs.

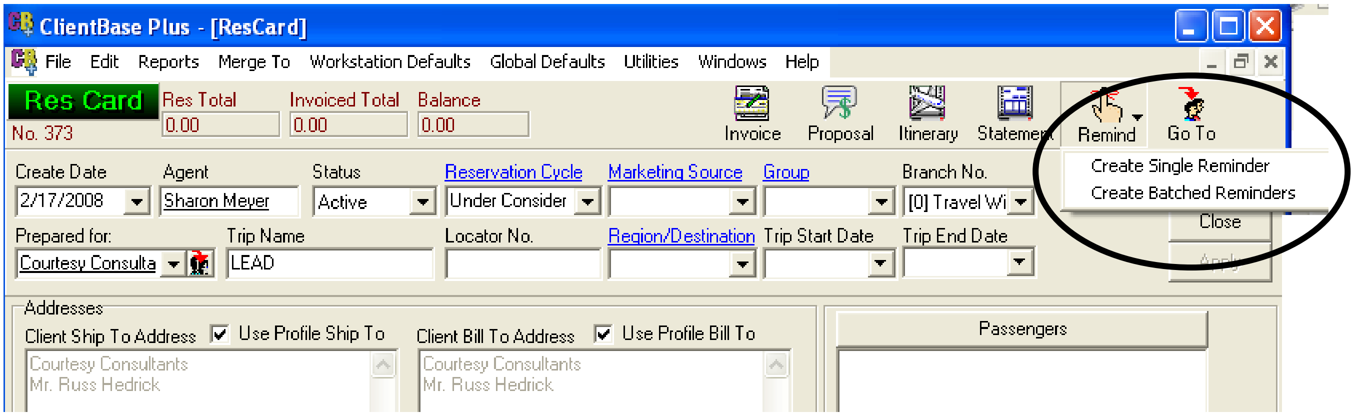
- Enter notes in Remarks about what you learn for you and for agents in case potential client calls.



- Additional contact information including phone and email can go in the Employee tab with notes in remarks.

II. CREATE A RES CARD & USE BATCHED REMINDERS TO MANAGE THE LEADS PROCESS





- Use the Status and Reservation Cycle to tag Lead in process and for queries and reports.

- Use Agent Remarks area as a "note pad".

- What Batched Reminders should I use?

  - **1 or 2 days after initial contact: (depending on whether it's a cold call or a scheduled meeting):**
    **Thank you for taking the time to meet with me (talk to me).
    **I'm sending you the information you requested.
    **I'd like to schedule a meeting.
    **Do you have any questions?

  - **7 days after a meeting:**
    **Any further questions please contact me.

  - **1 month follow-up**

  - **3 month follow-up**

  - **6 months follow-up**

  - **12 months**

  - **It also depends on the comments from the customer.**
    **Delete (or complete) future ones if the client has no interest & change Res Card Status, but don't delete the Res Card. Leave it for future reference.
    **Or change the date if they say they have a contract and can't decide anything or another 5 months, etc.
    ** Or **DON'T** change the date. Complete the reminder and schedule a new one. It's easier to read, and you can see the history a little clearer.

Note: By creating batched reminders, you can have separate reminders for each interaction so you can get reports; i.e. all 1 month follow-ups done last week. Some reps use a "rolling" reminder or one that never closes. It's one reminder that they update for each interaction with dates and remarks and they put a new reminder date on it. Every time they open this reminder, they have a running history of what has occurred. (Some agencies find this confusing…they close out all reminders and start new ones…which will you do?)

III. CREATE A SET OF DOCS & EMAILS FOR CORPORATE LEADS

- Create a unique header/footer in your corporate letters with tagline.
- Header is not included in emails.
- Have SMTP? Do an HTML document for your Corporate Clients.

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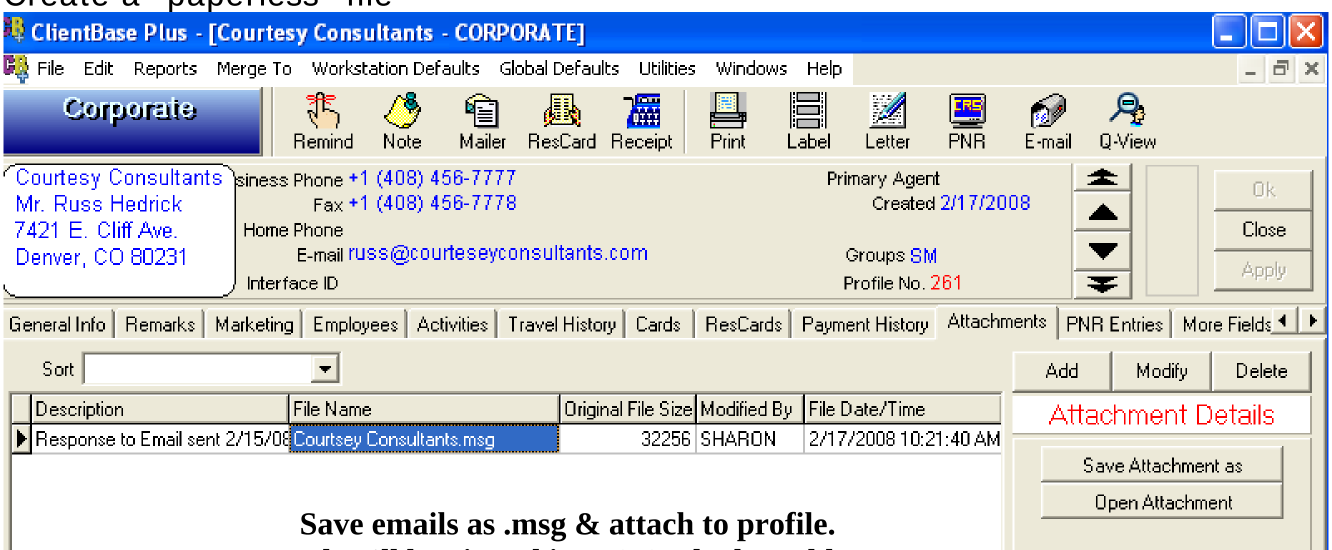
IV. ADD ATTACHMENTS OF LETTERS OR EMAILS WRITTEN TO OR ON BEHALF OF THE ACCOUNT

- Create a "paperless" file



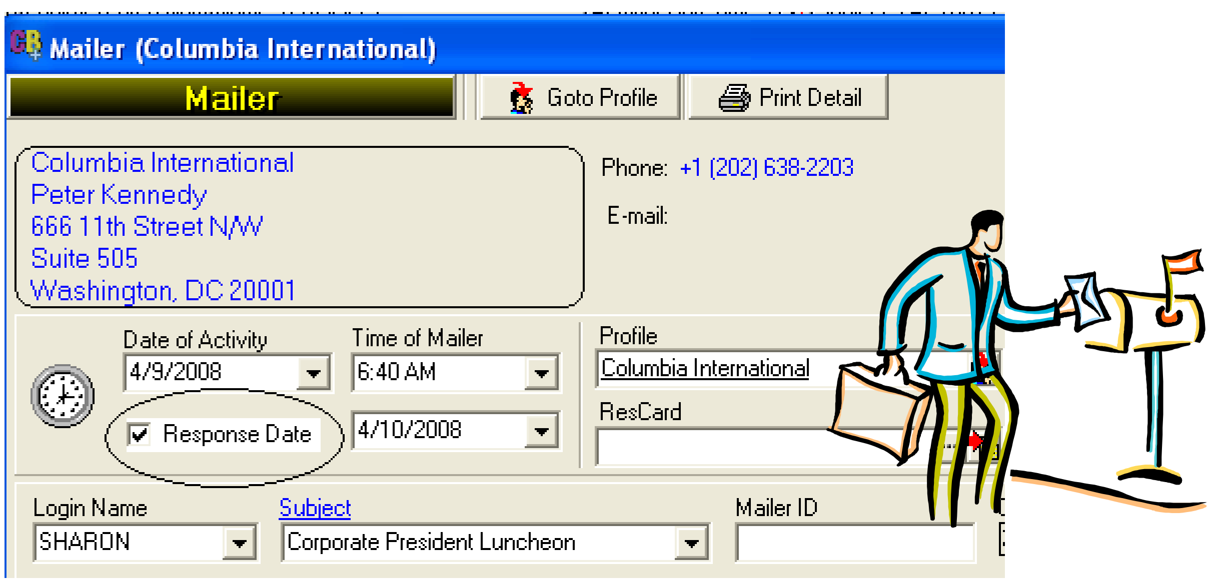
Save emails as .msg & attach to profile. They'll be viewed in MS Outlook. Add Word Docs, pdf's, Excel spreadsheets. As long as user has these programs, the attachment can be viewed.

Managing Corporate Clients

How does the Corporate Sales/Account Executive use ClientBase to manage relationship with new or existing clients?

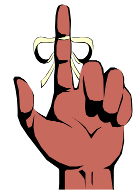
I. MANAGE RELATIONS WITH NEW/EXISTING CORPORATE CLIENTS

- Update Corporate Remarks Tab with Terms/Conditions of contract with new client.
- Put anniversary of initial contact date or contract start date of contract in *Special Dates* area.
- Use Reminders in ClientBase to manage the on-going relationship and general communications with these such as timing of corporate reports, statements, general touch-base calls, marketing calls, sending cards/gifts etc. (Don't forget to set up a reminder to call way before renewal of contract.) By using batched reminders, you can customize dates on these when they are setup in a Corporate Res Card.
- Use mailers to track who was sent invitations, mailings to VIP's etc., and use mailers to track who responded.



- New Customer Management (not just for sales person, but can be used for Customer Service Rep)

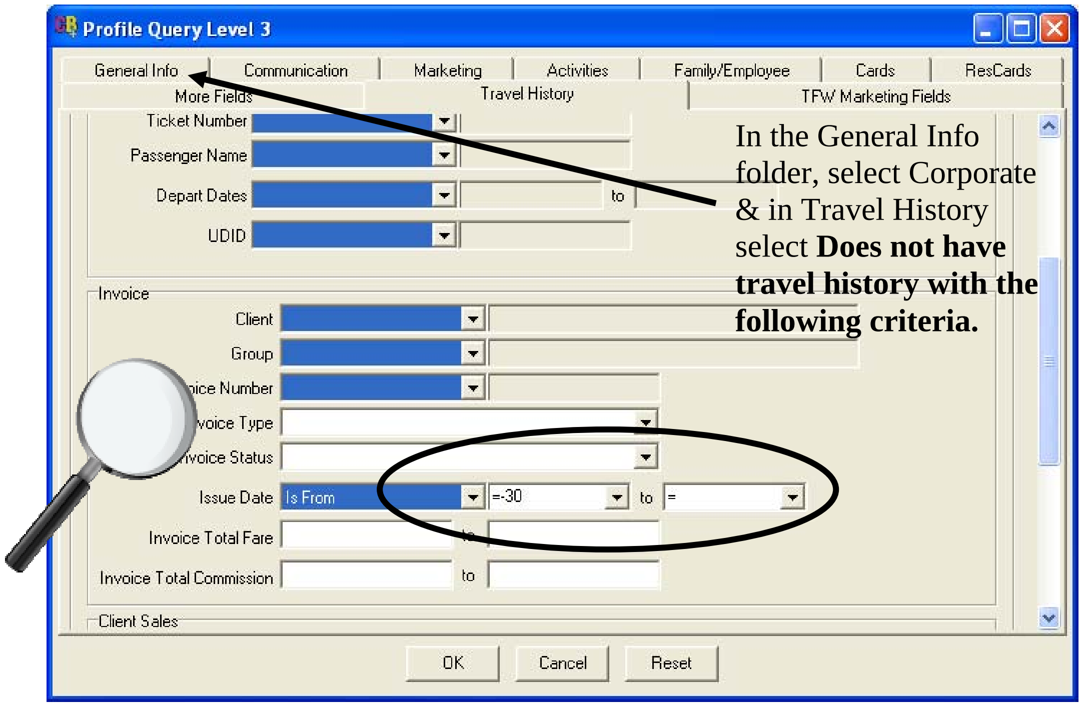
  Once client signs a contract or agree to do business with the agency, use another Batched Reminder setup to monitor how the customer is doing:

  - ***7 days*** *after start of booking date*
    Check Travel History to see if booked
    Call client to see how booking went
  -
  - ***14 days***
    Check Travel History to see if booked
    Check Notes and Reminders (if agents using to track) and see if there are open issues (see section below on Complaints & Resolution)
  - ***30 days***
    Check Travel History to see if booking
    If not, call customer to see if any problems
    Check Notes and Reminders (if agents using to track) and see if any open issues exist (see section below on Complaints & Resolution)
  - ***60 days or 90 days*** *(up to sales person)*
    Check Travel History
    If not, call customer to see if any problems
    Check Notes & Reminders (if agents using to track) and see if there are open issues (see section below on Complaints & Resolution)
  - ***90 days***
    Check Travel History
    Call to touch base, see how things are going
  - *At least every* ***6 months*** *(if not sooner) touch base. This should be ongoing so you could set up a reminder to redo the batch every 9 months.*

II. HOW TO LOOK FOR CORPORATE BOOKINGS IN LEVEL 3 QUERIES

- In Level 3 Query, select Corporate as *Profile Type* in General Info tab, and go into Travel History tab to set the Filter Type to “Does Not have Travel History with the following Criteria”.
  - o Enter an Issue Date From and To Range for either the last 30, 60 or 90 days. (Use Date Formulas so that the Query can be saved and run on an on-going basis (for example From =-30,0,0 To =). Run the Query, and select **File|Save Query As** to save it.



- **Be proactive!** Provide more personal service to keep good accounts and make sure that at any given time there is some kind of on-going follow-up Reminder in place. (Many times agencies wait until they don’t hear from a Corporate client to bother touching base with them.)

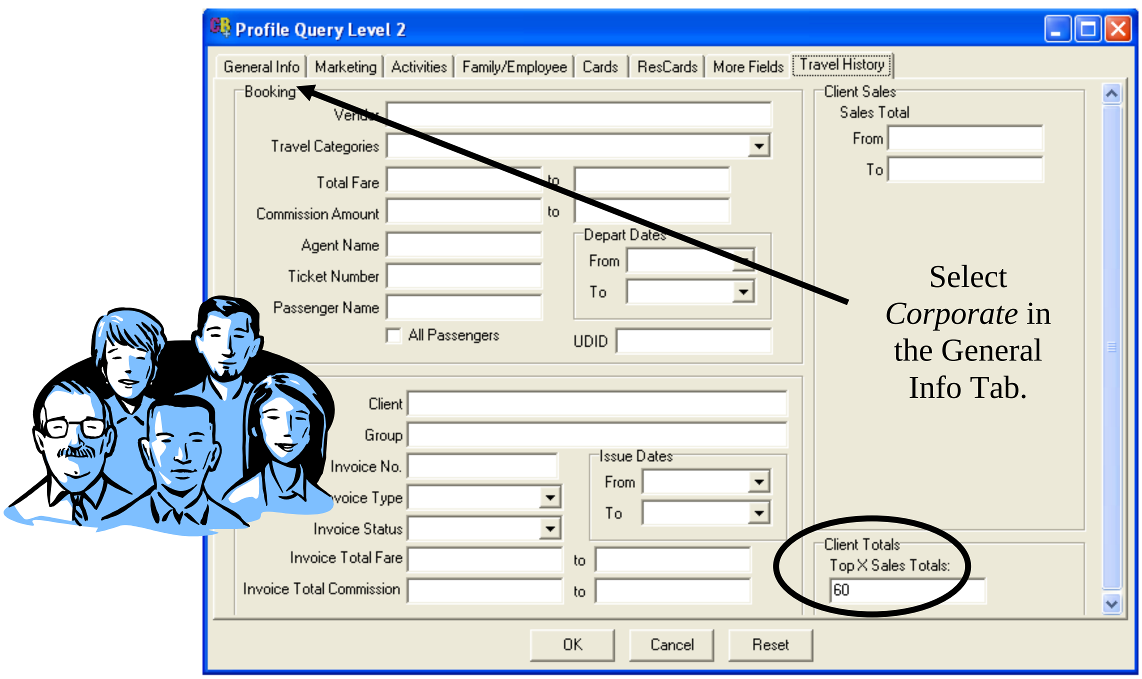
- Use the Merge to Letter, Merge to E-mail, and Merge to Label features in ClientBase to streamline communications and make corporate agents more efficient.

III. KNOW YOUR TOP 20% OF CORPORATE CLIENTS

We all know the 80/20 rule. 80% of the business usually comes from 20% of your clients. If that is the case for your corporate business, then you should be carefully managing the relationships with that top 20%.

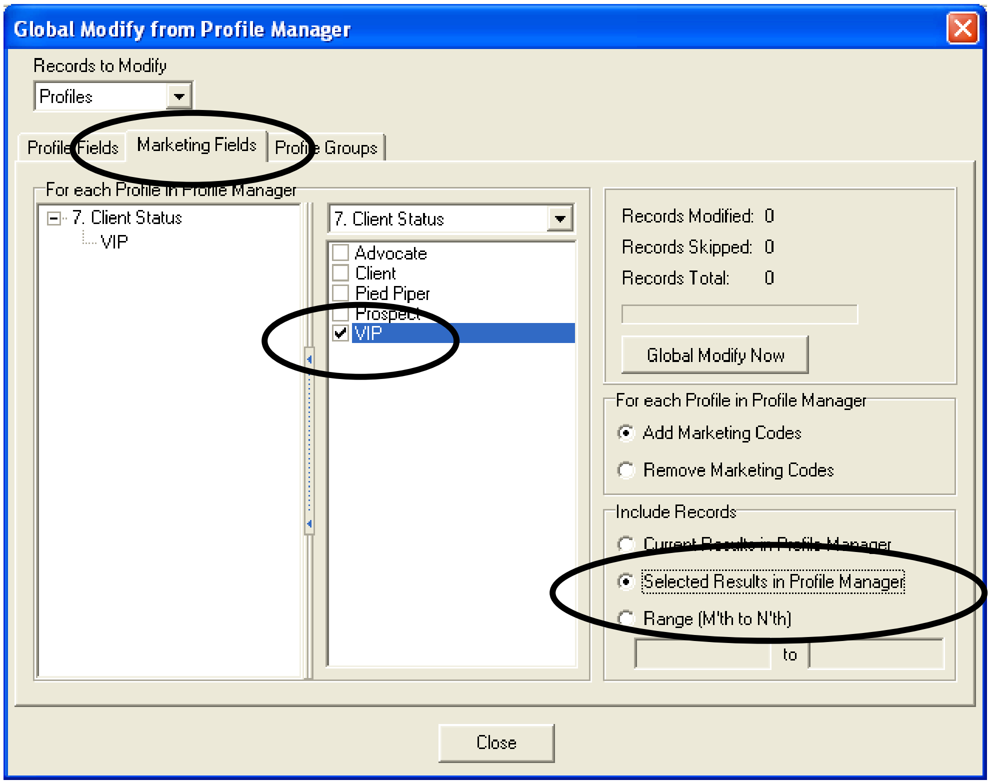
- Obtain through a Travel History Query if you have been invoicing in TBO, Globalware, or ClientBase. You can do this by querying for all Corporate clients in Level 1, and clicking *Coun*t. Calculate how many represent 20% of that total (i.e. For example if you have 300 corporate clients 60 would represent 20% of 300.)

- Next, query for your "Top X" clients, to get your top 20%. Go to Level 2 Query, click the General Info tab and set the Profile Type to Corporate. Then click the Travel History tab and enter the number of clients calculated above (in the example it was 60) into the Top X Sales Total filter. Click *OK* to get your top 20% producing corporate clients based on total past purchases.



- Save this query as a folder (**File|Save|Query As**) and reference it on an on-going basis as the clients appearing may change over time. If a good Corporate client suddenly drops from this list, you may want to touch base to make sure you've not lost any of their business. If a new client appears, you want to make sure proper follow-up (as suggested below) is in place.
(You need an easy way to see who has been dropped from this list since unless you print it and compare, you can't tell. Maybe create a Marketing Code for top 20% and then create a query to bring them up if not in the top 20%.)

- If you do not have Travel History, click the Global Corporate folder in the Profile Manager Level 1 Query; hold down the Control <ctrl> key and select your Top Corporate Clients. Next click **Utilities|Global Modify** to tag these as VIP's. Create folder as directed above.

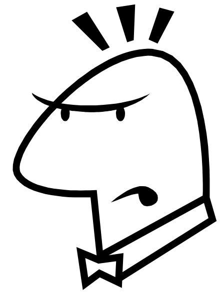


IV. Create PERMANENT History of Complaints & Resolutions

Best way to lose a customer is to not live up to their expectations or to let errors or problems go unresolved. Whether the problems are imagined by the customer or are truly the agency's fault makes no difference, it's all in the customer's perception. (This is also true for leisure clients.) It's important for the agency to keep on top of these and address them right away. Setting up Reminders, Notes and Mailer records provide an easy to access storage area associated with the customer.

- Using ClientBase creates a permanent history - create a system for handling customer complaints
- Think about removing Delete permission for reminders so cannot be removed
- Complete Open Reminders and document with how it was resolved
- Give Corporate agents access (even if not using ClientBase for bookings, so they can log in complaints creating them for the Sales/Customer Rep (including alarms for them)
- When booking, an agent could then look in ClientBase to see if this company has had any past issues so they can handle them with kid gloves.

- **Examples of different issues:**
  - Rudeness of booking agent
  - Agency didn't find lowest price (car, hotel, air)
  - Ticket was run at a higher price than quoted
  - Agent not knowledgeable
  - Company President / CEO / VP (or any VIP traveler) not handled properly
  - Didn't get special meal on flight
  - Hotel or room was unacceptable and never wants that hotel again
  - Limo driver was not prompt
  - Not receiving a prompt call back or e-mail



- **Examples of resolutions:**
  - Follow up with agent, hotel, airline or car
  - Complete and document in the Remarks of the Reminder
  - Setup a Reminder for the agent assigned (another good example why might want to give agents ClientBase access) to the account. Let agent know to be extra careful when booking.
  - Ask agent to set up a Reminder for the Customer Service rep next time the customer books, so they can touch base before/after trip to see if ok.
  - Mailers and attachments make it easy to review letters sent out on behalf of the client
  - Notes can be used but there's no follow-up action so not as practical as Reminders.

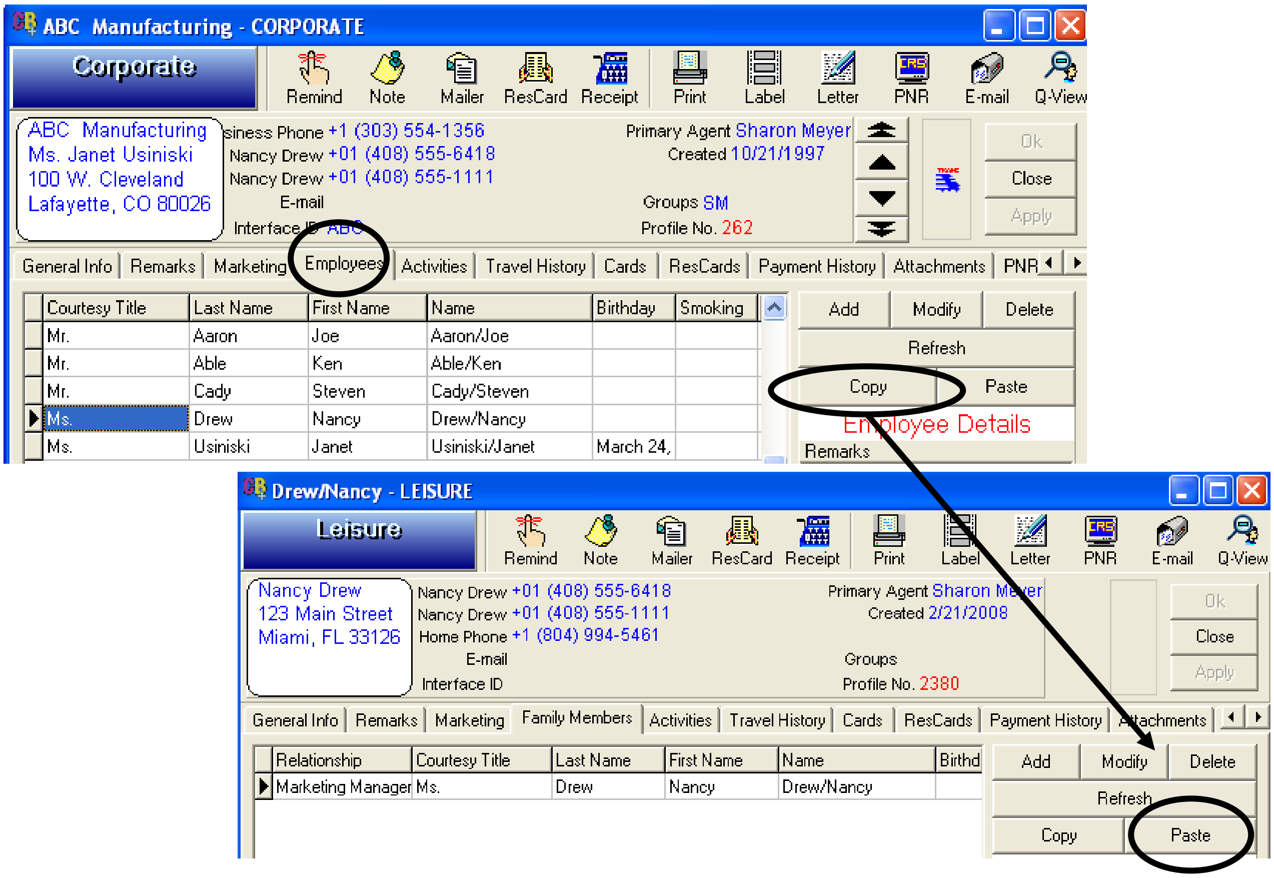
V. ADDITIONAL CLIENTBASE USES FOR CORPORATE CLIENTS

- Use the Res Card and Live Connect for bookings made outside of the GDS to avoid passive segments. The Res Card allows you to generate invoices that automatically land in TRAMS Back Office without the need to add the segments into a PNR.

- In addition to managing your Corporate clients, managing your vendors and their contact information is another part of a Corporate agent's role. ClientBase allows agents to get rid of their rolodexes and phone books and allows the agency to contribute to and share one master database of vendor data. Organize your key contacts, phone numbers, e-mail addresses, web sites and other important vendor information by updating and using the Vendor profiles in ClientBase. (Check out the handout, *CB: Storing Vendor Data with Profiles* under TMU link at www.trams.com for complete details.)

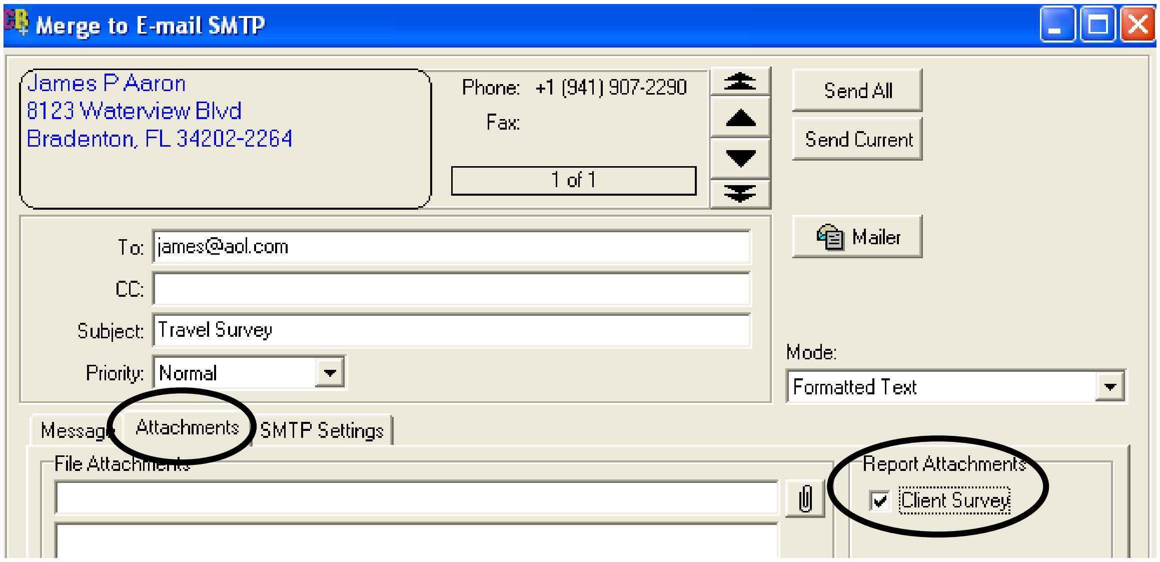
- Build separate leisure profiles for each employee of your corporate accounts and send Travel Surveys to them in an attempt to start getting their leisure business as well. Travel Surveys can be printed from within a profile by clicking the “Print” icon on the toolbar, or from the results of a Query by going to **Reports|Profile Reports|Client Survey**.

  - Copy Employee Entry in Corporate Profile (by clicking *Copy)* and paste it to a leisure profile:



- Travel Surveys can also be e-mailed as an attachment by using the Merge to E-mail feature, clicking the Attachment tab and placing a checkmark in the Client Survey attachment box. Make sure any Frequent Flyer numbers and other travel needs (use Copy/Paste from Employee tab) are copied into the Leisure profile so that same level of service can be provided for their leisure travel.

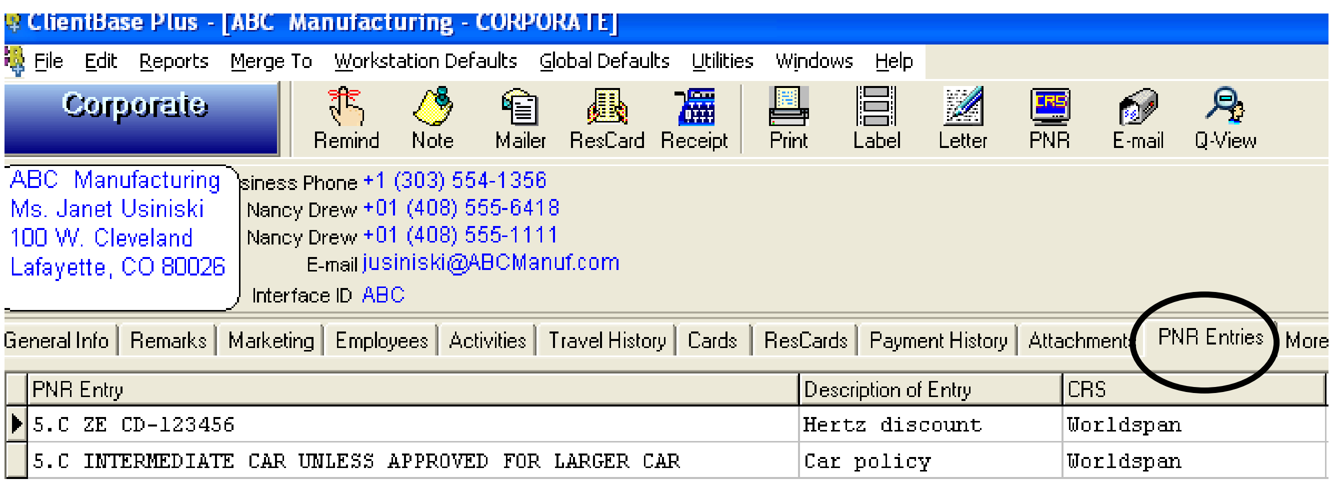
- When provided with updates or changes, make sure to complete these in both the Corporate and Leisure profiles.



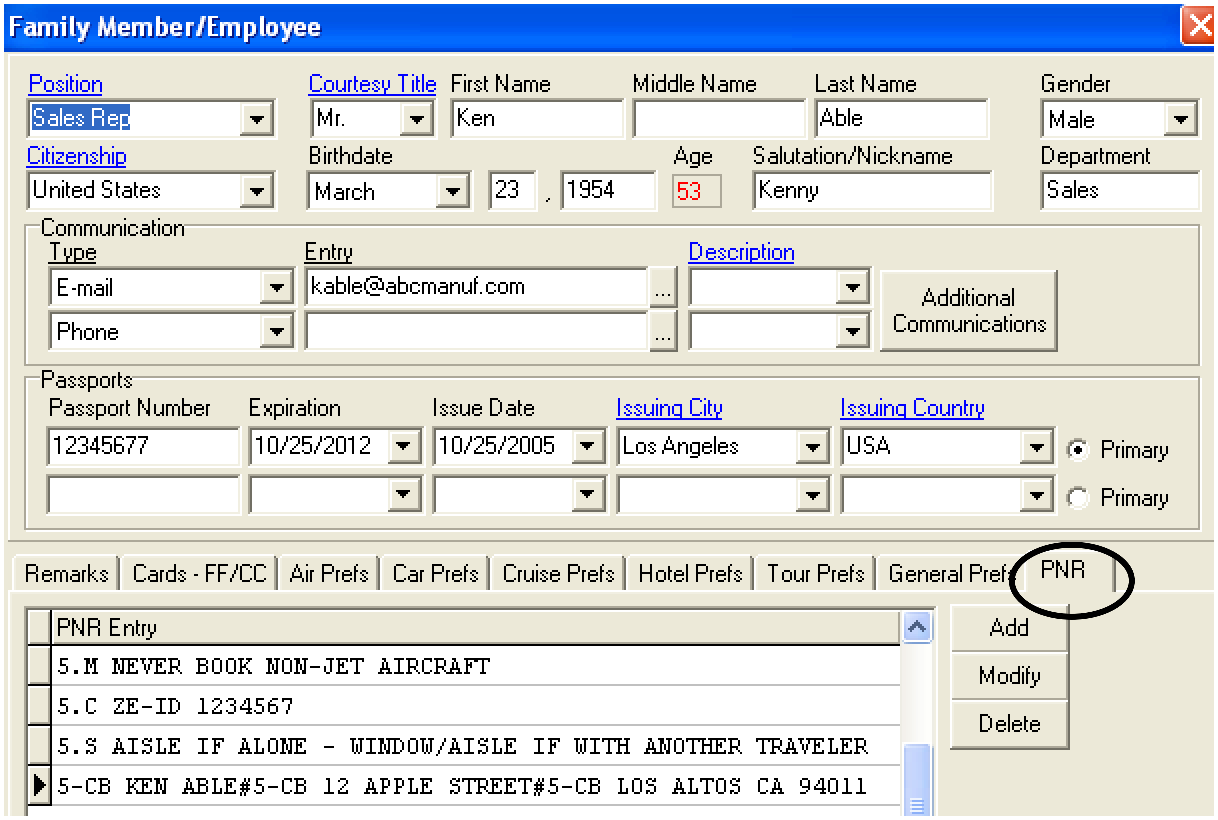
- Use the Group field within all leisure profiles created to capture the Corporate account name and tie all future corporate and leisure business together in one report if desired. (You can also use a More Field too….but Groups are easier to delete when no longer needed as More Fields are more permanent.)

- Use the Merge to PNR feature to seamlessly format all profile data for any or all of the GDS, including Apollo, Amadeus, Sabre and Worldspan. Between the customizable PNR Rules and the PNR Entry tables at the Branch, Agent, Profile and Passenger levels, any data you need to start a PNR can be sent via ClientBase.

- If you create PNR Rules in ClientBase to merge data into a PNR, you can add corporate policy; car restrictions; discount numbers; preferred hotels, etc:



- Merge to PNR Settings at the Employee level will merge passenger-specific entries if desired:



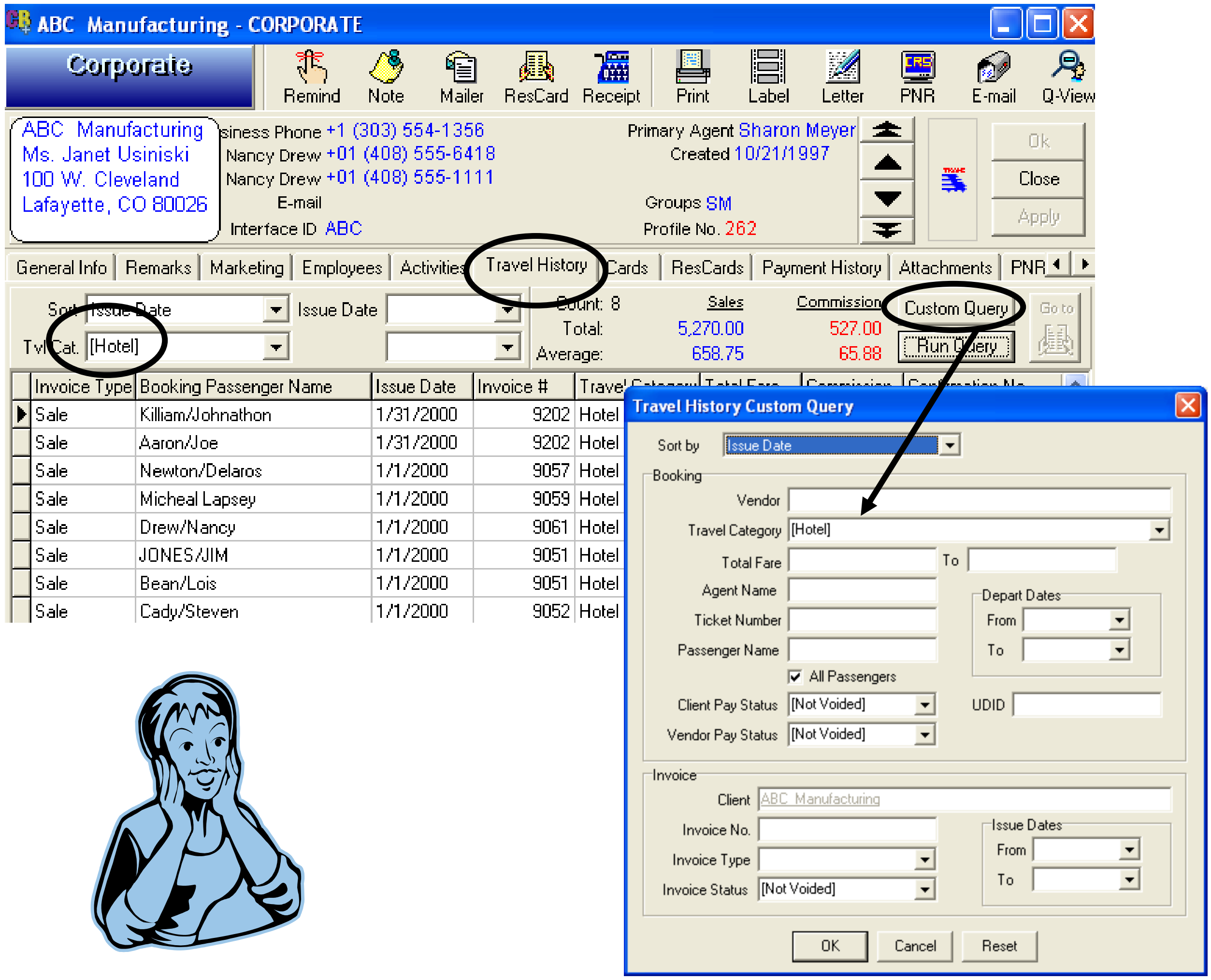
- Want to keep a record of a quoted price and itinerary that doesn't end up getting booked? Create a Res Card and copy and paste the PNR details into the Res Card Agent Notes area. Prior to ignoring the PNR, highlight the entire PNR, press Ctrl C to copy and then using Ctrl V, paste into the Res Card.

- Are your Corporate agents using ClientBase? If you book your Corporate accounts through consolidators, you could use ClientBase to do your invoicing.

- Use the Merge to E-mail feature to easily e-mail the quoted flight/hotel options given over the phone via same copy/paste process above.

- Use the Travel History tab within the Corporate profile to look up past hotels and itineraries that many times travelers assume you have access to, or you remember. No need to go to the bookkeeper or to dig through old invoices, when all the details are available within the ClientBase Corporate profile. (They don't go away after the client travels like PNR's do!)

- You can even filter the Travel History within a corporate profile by travel category, date frame, passenger name and more by clicking *Custom Query* within the Travel History tab.



- Use the same Travel History tab within the Corporate profile to view ticket numbers to see if they are voided instead of turning these over to Accounting.

- Manage incentives/reward programs offered by your Corporate client.
  - Create a Res Card to track options and rates
  - Res Card provides easy access to the booking details when the winner or recipient calls for information
  - If space is blocked, create an Inventory record (be sure to include a Group Name). Pull into a Res Card to manage space and run reports and track travelers as booking
  - If Corporate client gives permission, build a Leisure profile to market to traveler in the future
  - Run Res Card, Inventory or TRAMS Crystal Reports