

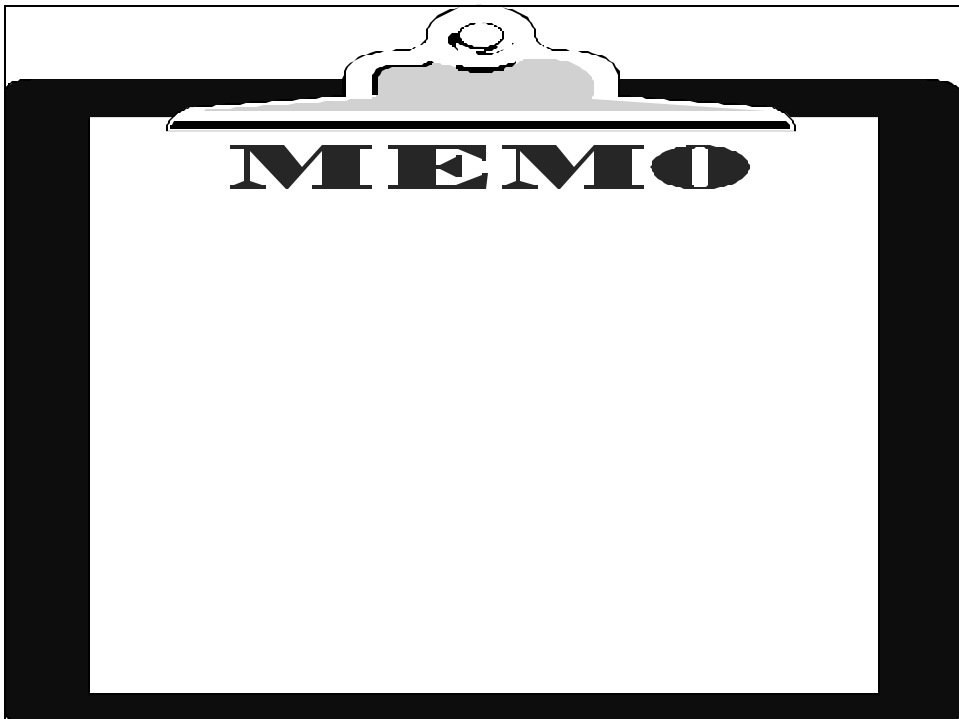
Sharon Meyer, CTC
ClientBase Product Manager

Using
ClientBase to
Develop a
Travel Agency
Marketing
Plan and
Sales Strategy



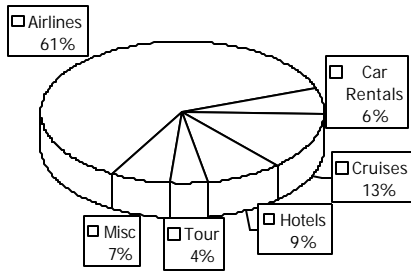
Travel Agency Marketing

**Lee Rosen
President, TRAMS, Inc.**

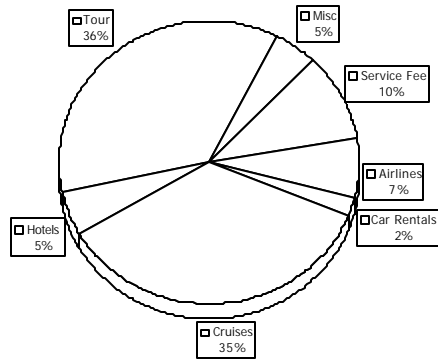


Travel Agency Opportunities

1998



2006



Travel Agency Opportunities

The Retail Travel Industry Has

Changed



Travel Agency Opportunities

How to Influence the Travel Purchase

Marketing

Sales

Marketing Travel The Best Travel Agencies Market

Funjet Vacations

FREE SUMMER FUN FOR EVERYONE!

Whether you're looking for fun for the family or as a couple... you'll find Fun Jet from Funjet with your summer vacation package. The Fun Jet's Super Fun package offers that give you more for your money!

Make your reservation by May 11 to take advantage of the Free Season Fun!

SHIP NAME	DEPARTURE	PRICE
Allegro Means Vacation by Occidental	Valletta May 8, 13, 16, 19, 26, 29	3 nights from \$499.00 +
Allegro Means Vacation by Occidental	Valletta May 11, 13, 17, 20, 31	5 nights from \$699.00 +
Fun Cruise Day Resort	Cancun	5 nights from \$399.00 +
Funjet Royal Valletta	Rosetta - Malta Jun 12 - Aug 24	5 nights from \$1,899.00 +

For information and reservations, contact
Your Agency Name
at 310-555-1234

GET OUT THERE WITH THESE 2006 FAMILY CRUISE SPECIALS!

CRUISE CENTER LINCOLNWOOD IS YOUR LOCAL CROWN & ANCHOR HEADQUARTERS. YOU'LL GET THE BEST DEALS & SERVICE... WE DON'T JUST CHANGE SERVICE FEES!

CARIBBEAN	MEXICO	HAWAII
Freedom of the Seas SAIL THE WESTERN COAST ON THIS BRAND NEW SHIP!	Harbor of the Seas AT JUST \$949.99, TAKE THE WHOLE FAMILY!	Vision of the Seas ESCAPE THE COLD WITH THIS FAMILY GETAWAY!
ROYAL OF THE SEAS \$2876	ROYAL OF THE SEAS \$1856	ROYAL OF THE SEAS \$1656
		ROYAL OF THE SEAS \$3796





Call 800-775-1314 or 800-725-1101 for more information. **CRUISE CENTER** LINCOLNWOOD, WA. **Royal Caribbean**

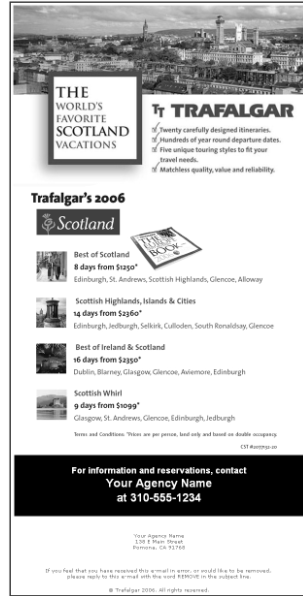
EquiFirst

Get the most from EquiFirst!
Visit the EquiFirst Gift Academy by clicking on "GIFTS" to see an amazing list of more value gift options.
Call us now, share your knowledge about us on FB, FB, Search #E114 for more!
• Get a free personalized gift basket that will change the way you think about EquiFirst.
• Get to visit a gift location at the famous Pacific Beach Gift Store!
• The morning an invitation to our annual beach walk and cigar event!
• Be all-in-one! Right in the new world of EquiFirst. Find out how we can make your work life better. You'll love it!
• EquiFirst is a 100% employee-owned company. We're proud to be a part of the EquiFirst family. We're proud to be a part of the EquiFirst family. We're proud to be a part of the EquiFirst family.

Effective Marketing

Target Marketing

-  Right Promotion
-  Right product
-  Right Client
-  Right Time







THE WORLD'S FAVORITE SCOTLAND VACATIONS

TRAFALGAR

*Twenty carefully designed itineraries.
Hundreds of year-round departure dates.
Five unique touring styles to fit your travel needs.
Matchless quality, value and reliability.*

Trafalgar's 2006 Scotland

-  **Best of Scotland**
8 days from \$2390*
Edinburgh, St. Andrews, Scottish Highlands, Glencoe, Alloway
-  **Scottish Highlands, Islands & Cities**
14 days from \$2660*
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-  **Best of Ireland & Scotland**
16 days from \$2990*
Dublin, Blarney, Glengoe, Glencoe, Antrim, Edinburgh
-  **Scottish Whirl**
9 days from \$1099*
Glasgow, St. Andrews, Glencoe, Edinburgh, Jedburgh

*Taxes and Surcharges: Taxes are per person, land only and based on double occupancy. CST applicable.

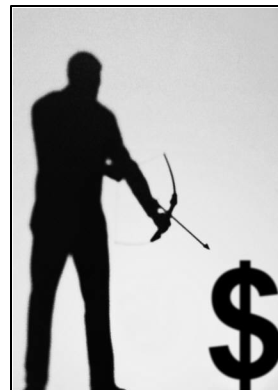
**For information and reservations, contact
Your Agency Name
at 310-555-1234**

Your Agency Name
2222 N. Palm Street
Perris, CA 91769





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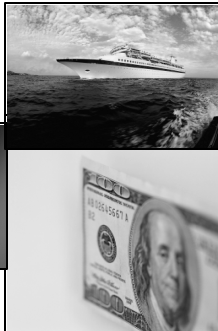
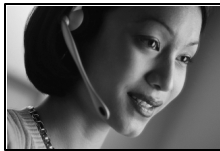
What is the Purpose of Marketing?

1. **Keep** existing clients.
2. **Get** new business.



Effective Marketing

-  Generic
-  Travel Category
-  Product
-  Offering



HEAVENLY TAHITI

Luxury goes exploring™

BOOK THE MAY 27, 2006 VOYAGE AND YOUR TRAVELING COMPANION ENJOYS FREE ECONOMY CLASS AIR*

CRUISE FARES FROM ONLY \$1,995

Like the sparkling stars in your favorite constellation, the Society Islands scatter across the turquoise seas of the South Pacific, their silver sands andapphire lagoons as magical as the Milky Way. It's time for a group of islands in the void as romantic as the Society Islands (or as beautiful for that matter).

RSC is pleased to announce a special offer from Los Angeles - **Free Roundtrip Economy Class Air*** for the second guest when the first guest pays the standard Economy Air rate on the May 27th departure of the Paul Gauguin.

The 7-night Society Islands cruise calls on each of these special islands: Papeete, Tahiti, Moorea, Faaa, Uaouaka (Huahine), Bora Bora & Motufoofu. Other stops may vary due to weather events. As with the fabulous Paul Gauguin offers a genuine, authentic South Pacific experience. **Space is limited and going fast!** so act now!

***PAID GUESTS: a ship to match your South Pacific dreams™**

SPECIAL OFFER

PARAETIE, TAHITI TO PARAETIE, TAHITI ON PAUL GAUGUIN
 Brochure Fares from \$2,785 per person
 7 nights - Departing May 27, 2006
 Savings with Economy Air - Fares from **\$1,995** per person

For information and reservations, contact
Your Agency Name
 at 310-555-1234

Fares are per person, based on double occupancy, and do not include an add-on port, handling and security charges, air fuel surcharge, additional. Offer applies to first and second guests in same cabin only. The offer is capacity controlled and certain restrictions apply. The first guest pays the standard Economy Air rate roundtrip from Los Angeles, second guest receives Economy Air complimentary roundtrip from LA. If the first guest chooses to upgrade to Business Class or First Class air from the second guest will receive an \$159 roundtrip air upgrade off of the standard Business Class or First Class Air add-on rate. There is no occupancy limit. This offer is restricted to sail or gateway only.

Your Agency Name
 138 E Main Street
 Pomona, CA 91768

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Effective Marketing

-  Timing
-  Relevancy
-  Content
-  Presentation
-  Distribution



What's the foundation of your marketing program?

eMail

-  Customized
-  Targeted
-  Timely
-  Measurable
-  Links/Integrated
-  Viral
-  Affordable



Effective Sales

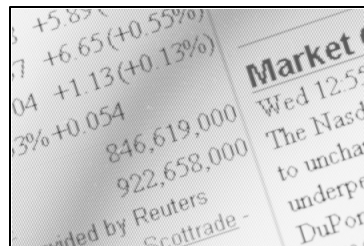
Sales / Merchandizing

Point of Sale Technology

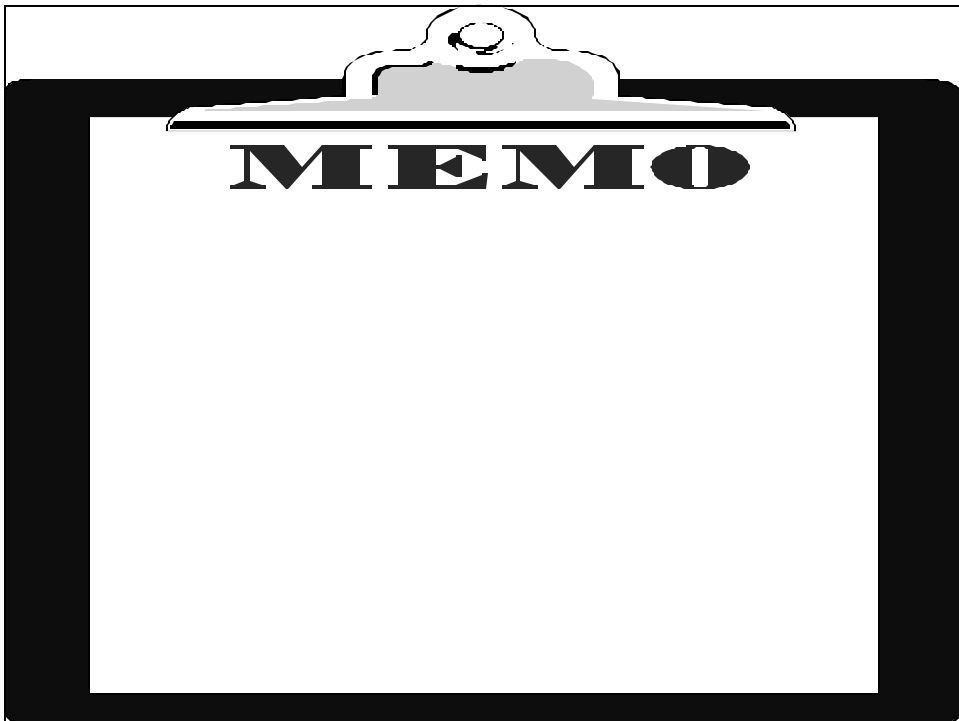
Information

Skills

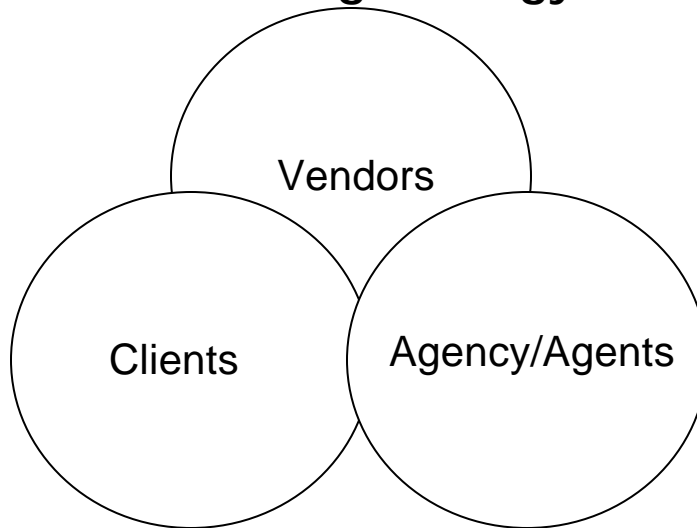
Training



Let's break into groups!



Creating a Well Rounded Marketing Strategy



Creating a Well Rounded Marketing Strategy

1. Vendor Driven Marketing
2. Client Driven Marketing
3. Agency Driven Marketing

Vendor Driven Marketing

Carnival
Just more fun.



Cruise

Funjet Vacations
as fun starts here!

Regent
SEVENSEAS CRUISES



Tour

CUNARD

TRAFALGAR
The World's Favorite Touring Company

NCL

NORWEGIAN CRUISE LINE



Air



Car

UNITED VACATIONS

INSIGHT VACATIONS
The Art of Touring in Style

AVIS

Preferred Supplier Marketing:

Identify and focus on your key vendors.

Develop an on-going plan designed to drive in desired business with the desired suppliers by putting the right product in front of the right customer.

Vendor Driven Marketing



Identify the right products then match to the right customers.

1. Use preferences as a way of targeting a specific promotion. (Marketing Info)
2. Use past travel as a way of targeting a specific promotion. (Travel History)
3. Use promotional frequency as a way of targeting a specific promotion. (Past Mailers)

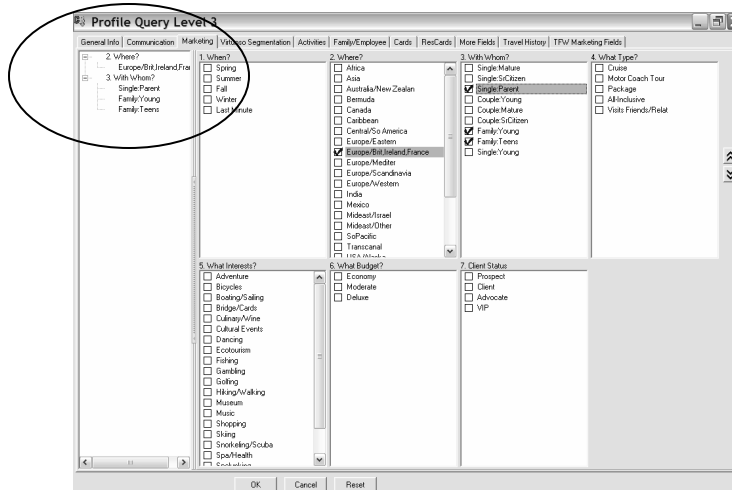
Vendor Driven Marketing

1.) Use preferences as a way of targeting a specific promotion.



Vendor Driven Marketing

1.) Use preferences as a way of targeting a specific promotion. "Include" only those that apply.



Vendor Driven Marketing

- 1.) Use preferences as a way of targeting a specific promotion.

Carnival
The Fun Ships

SHAPE & MEN'S FITNESS - MIND/BODY CRUISE

Join us aboard CARNIVAL GLORY for the 3rd Annual "Mind/Body Cruise," December 2, 2006

7 Day Western Caribbean Cruise from Only \$679*

Get fit and while having fun on this spectacular 7 Day Western Caribbean cruise departing from Fort Lauderdale.

This journey will re-energize your mind, body and spirit as you cruise to the beautiful ports of Key West, Belize and Costa Rica.

While on board, you can participate in any and all of the complete mind/body program hosted by the faculty of experts from Shape and Men 2 fitness magazines, including Mind/body classes taught on deck in the fresh air, fat burning body sculpting classes, home-based exercise plans as well as informative and motivating nutrition lectures presented by our nationally recognized experts.

Best of all, there will be plenty of time for you and your family to enjoy the incredible onboard experience of the Carnival Glory while this fabulous "Fun Ship" takes you from one amazing port to the next.

World Wide Travel
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Web: www.worldwidetravel.net • Phone: 310.555.1234

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Vendor Driven Marketing

- 1.) Use preferences as a way of targeting a specific promotion. "Exclude" only those that don't apply.

Profile Query Level 3

General Info | Communication | Marketing | Activities | Family/Employees | Cards | RecCards | More Fields | Travel History | TDW/Marketing Fields

1. With Whom?
 Spring
 Summer
 Fall
 Winter
 Last Minute

2. Where?
 Africa
 Asia
 Australia/New Zealand
 Bermuda
 Canada
 Caribbean
 Central/So America
 Europe/Eastern
 Europe/UK/Ireland/France
 Europe/Western
 Europe/Scandinavia
 Europe/Western
 India
 Mexico
 MiddleEast/Israel
 MiddleEast/Other
 South Pacific
 Transconental

3. With Whom?
 Single/Mature
 Single/Single
 Single/Parent
 Couple/Young
 Couple/Mature
 Couple/Single
 Family/Young
 Family/Teens
 Single/Young

4. What Type?
 Cruise
 Motor Coach Tour
 Package
 All-Inclusive
 Visits Friends/Relat

5. What Interests?
 Adventure
 Bicycles
 Boating/Sailing
 Bridge/Cards
 Culinary/Wine
 Dancing
 Eco/Outdoor
 Fishing
 Gardening
 Golfing
 Hiking/Walking
 Museums
 Music
 Shopping
 Skiing
 Smoking/Scuba
 Spa/Health

6. What Budget?
 Economy
 Moderate
 Deluxe

7. Client Status
 Prospect
 Client
 Advocate
 VIP

OK Cancel Reset

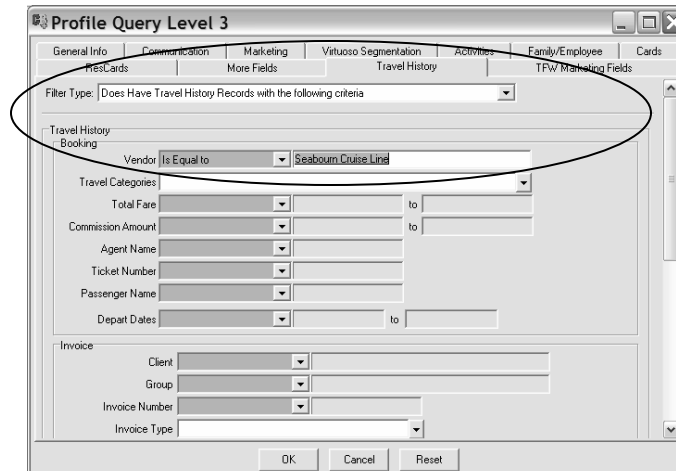
Vendor Driven Marketing

2.) Use past travel as a way of targeting a specific promotion.



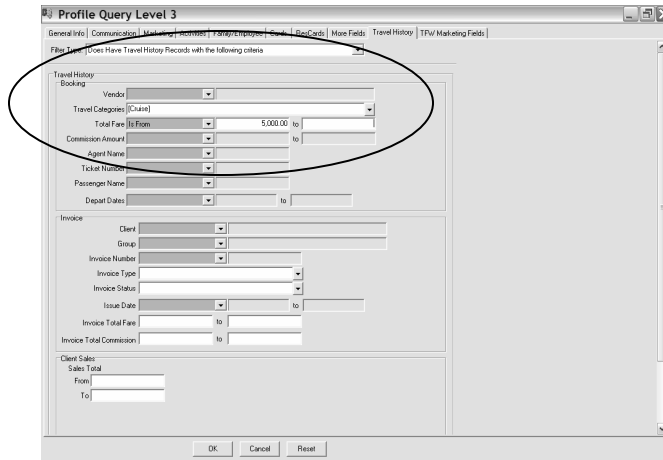
Vendor Driven Marketing

2.) Use past travel as a way of targeting a specific promotion. "Include" those that have previously booked with a particular Vendor.



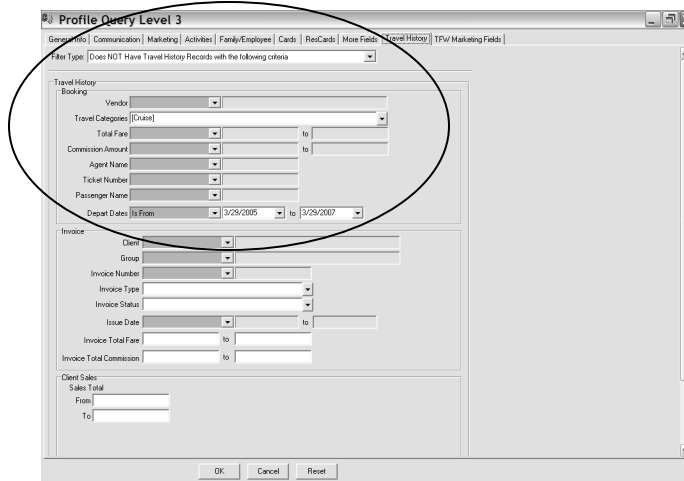
Vendor Driven Marketing

- 2.) Use past travel as a way of targeting a specific promotion. "Include" those that have previously spent a particular amount.



Vendor Driven Marketing

- 2.) Use past travel as a way of targeting a specific promotion. "Exclude" those that have cruised within a recent period.



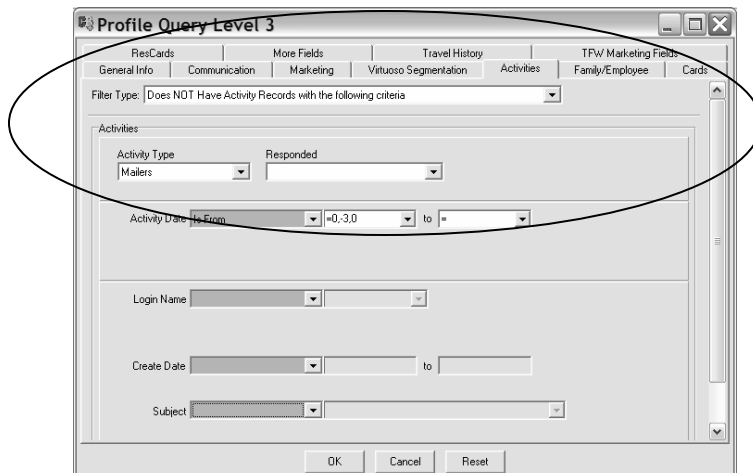
Vendor Driven Marketing

3.) Use promotional frequency as a way of targeting a specific promotion.



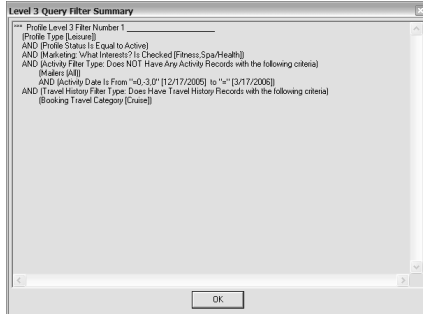
Vendor Driven Marketing

3.) Use promotional frequency as a way of targeting a specific promotion. Exclude those that have received marketing pieces in the last 3 months.

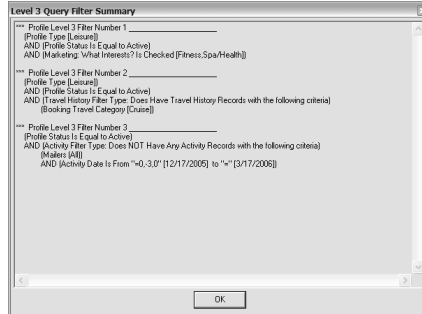


Vendor Driven Marketing

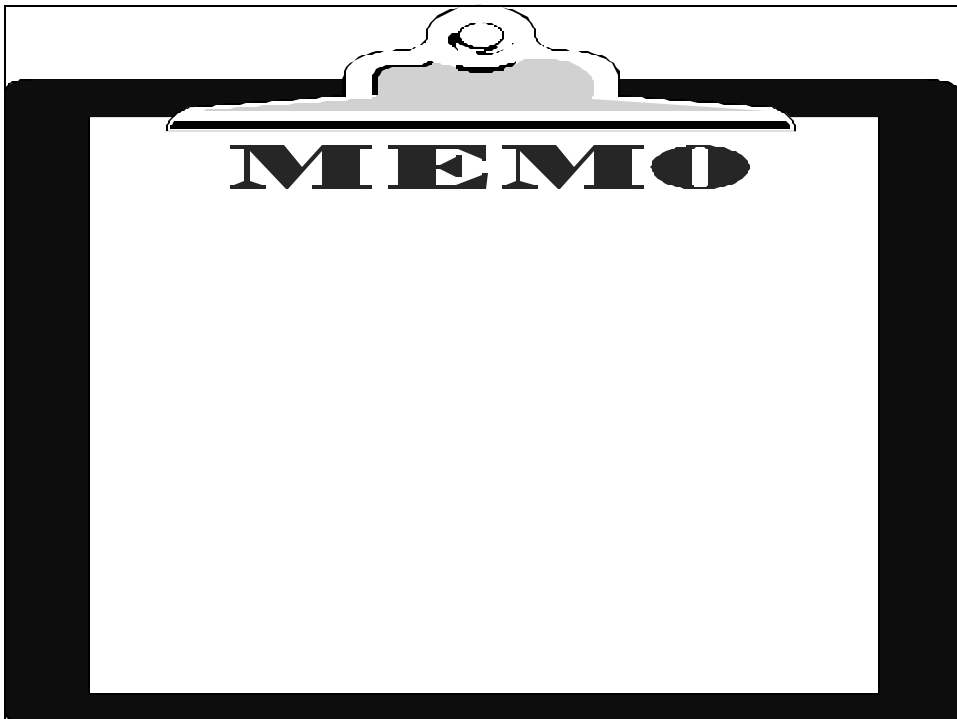
Query across Marketing Info, Travel History and/or Activities



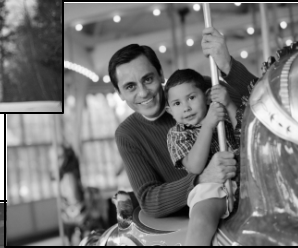
Use one filter set and the results must match all of the criteria.
Narrowing your results.



Use multiple filter sets and the results can match any of the criteria. Broadening your results.



Client Driven Marketing



Sweet Spot Marketing:

Identify and focus on key niches within your customer base.

Anticipate your clients' travel needs. Use their preferences and past purchasing behavior to create personalized offers that stimulate travel purchases.

Client Driven Marketing



Identify the right customers then match to the right products.

Find the “sweet spots” in your database by using the following:

- 1.) Marketing Code Statistics Report
- 2.) Family Member Information
- 3.) Special Dates
- 4.) Top X

Client Driven Marketing

1.) Marketing Codes Statistics Report

Marketing Code	Profile Count	Matches	% of Total (Matches/Profile Count)
1 ADULT ONLY VACATIONS			
Adult Only	36315	715	1.97%
Adventure	36315	793	2.18%
All-Inclusive	36315	233	0.64%
Art	36315	333	0.92%
Beach/Sun	36315	99	0.27%
Bicycling	36315	31	0.08%
Bridge/Cards	36315	4	0.01%
Children's Activities	36315	42	0.12%
Cultural Travel	36315	415	1.14%
Family	36315	928	2.56%
Fishing	36315	55	0.15%
Fitness	36315	18	0.05%
Food & Wine	36315	711	1.96%
Golf	36315	160	0.44%
Hiking & Walking	36315	18	0.05%
History	36315	16	0.04%
Honeymoon	36315	21	0.06%
Horseback Riding	36315	4	0.01%
Music	36315	452	1.24%
Quick Getaways	36315	23	0.06%
Rail	36315	0	0%
Romance	36315	22	0.06%
Sailing	36315	62	0.17%
Scuba/Snorkeling	36315	121	0.33%
Shopping	36315	21	0.06%
Snow/Ski	36315	35	0.10%
Spa	36315	40	0.11%
Surfing	36315	1	0%
Tennis	36315	7	0.02%
Theater	36315	16	0.04%
Water sports	36315	209	0.57%
Whale Watching	36315	203	0.56%
2 CRUISE VACATIONS			
All Cruise Offers	36315	1214	3.34%
Alaska	36315	1992	5.46%
Antarctic	36315	8	0.02%

Use Marketing Code Statistics to find the sweet spots in your customer base.

Client Driven Marketing

1.) Marketing Code Statistics Report

Profile Query Level 2

1. SPECIALTY VACATIONS

- Adult Only
- Adventure
- All-Inclusive
- Art
- Beach/Sun
- Bicycling
- Bridge/Cards
- Children's Activ
- Cultural Travel
- Family
- Fishing
- Food & Wine
- Golf

2. CRUISE

3. LAND VACATIONS/TOURS

Marketing Code	Profile Count	Matches	% of Total (Matches/Profile Count)
Bermuda	928	2	0.22%
Black Sea	928	0	0%
Canada/New England	928	5	0.54%
Canary Islands/North Africa	928	1	0.11%
Casibbean	928	294	31.68%
Central/South America	928	5	0.54%
Disney World / Florida	928	114	12.29%
Europe	928	22	2.37%
Greece	928	0	0%
Hawaii	928	36	3.88%
Mediterranean	928	12	1.29%
Mexico (Baja)	928	48	5.17%
Mexico	928	100	10.78%
Oceania	928	0	0%
Panama Canal	928	12	1.29%
Red Sea/Sea Canal	928	0	0%
River Cruises	928	3	0.32%
Scandinavia	928	3	0.32%
Small Ships	928	1	0.11%
South Pacific	928	23	2.48%
Tahiti	928	15	1.62%
Trans Atlantic	928	3	0.32%
Trans-Pacific	928	0	0%
World Cruises	928	0	0%
3 LAND VACATIONS/TOURS			
All Land Offers	928	56	6.03%
Africa	928	4	0.43%
Asia	928	0	0%
Australia/New Zealand	928	4	0.43%
Bahamas	928	2	0.22%
Bonavista	928	0	0%
Canada	928	1	0.11%
Caribbean	928	14	1.51%
Central/South America	928	0	0%

Learn more about those niches within your database by first filtering on the niche marketing code and then re-running Marketing Code Statistics report.

Client Driven Marketing

2.) Family Member Information

The screenshot shows the 'Profile Query Level 2' window with the 'Family/Employee' tab selected. The form includes fields for 'Relationship/Position', 'Courtesy Title', 'First Name', 'Middle Name', and 'Last Name'. Below these are 'Birth Date' fields with 'From' and 'To' dropdowns, and 'Gender' and 'Citizenship' dropdowns. There is also a 'Department' field. A 'Communication' section has 'Type', 'Entry', and 'Description' fields. A 'Passport' section includes 'Primary' dropdown, 'Passport Number', 'Issuing City', 'Issuing Country', 'Expiration' (with 'to' dropdown), and 'Issue Date' (with 'to' dropdown). At the bottom are 'OK', 'Cancel', and 'Reset' buttons.

Use Family Member Birthdates to locate families with small children.

Client Driven Marketing

3.) Special Dates.

The screenshot shows the 'Profile Query Level 2' window with the 'Family/Employee' tab selected. The 'Special Dates' section is circled in red. It contains 'From' and 'To' dropdowns for 'Month', 'Day', and 'Year', and a 'Type' dropdown. Below this are 'Profile Create Date', 'Profile Create User', 'Profile Modified Date', 'Profile Modified User', and 'Profile Status' fields. To the right of the form is a cartoon illustration of a person holding a large check with the number '25' on it. At the bottom are 'OK', 'Cancel', and 'Reset' buttons.

Anticipate Special Occasions and Market accordingly.

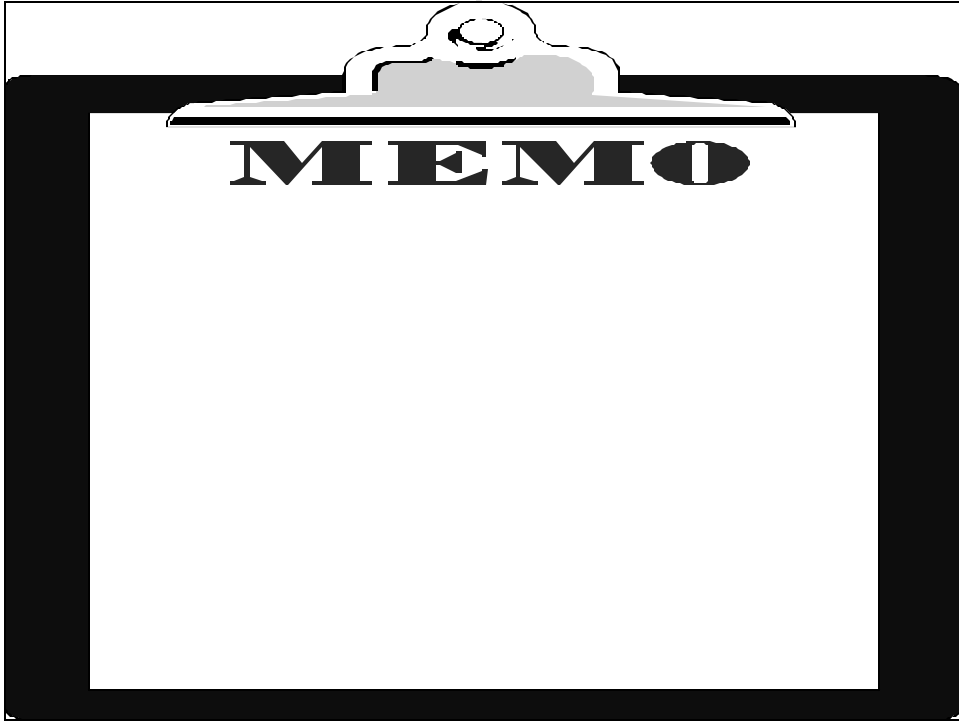
Client Driven Marketing

4.) Top X.

80/20 rule suggests 20% of your customer base is your sweet spot.

Client Driven Marketing

Generic HTML templates for your agency can be used to create your own customized promotional piece.



Agency Driven Marketing

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138 E. Main Street • Pomona, CA 91768
Web: www.worldwidetvl.net • Phone: 310.555.1234



Agency/Brand Marketing:

Develop your agency brand and market your agency in addition to specific travel offerings.

Create and nurture relationships with your customers by touching them regularly.

Agency Driven Marketing

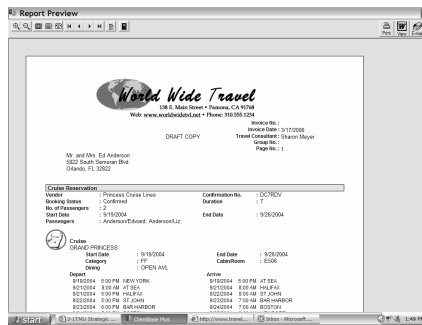
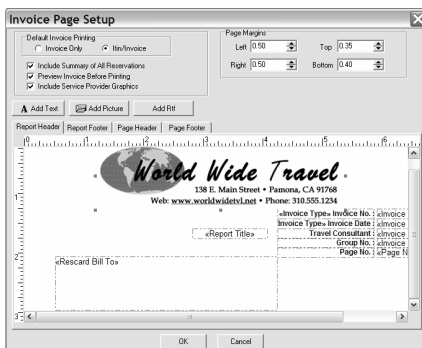


Heighten your presence and develop a high touch client strategy.

- 1.) Polish your Brand and Logo and make sure all agency collateral reflects it.
- 2.) Market Your Agency and Agent Services/Expertise, not just your Vendors.
- 3.) Mine your database for relationship building opportunities.

Agency Driven Marketing

- 1.) Polish your Brand and Logo and make sure all agency collateral reflects it.



Use Headers and Footers to customize Invoices, Itineraries and Trip Statements.

Agency Driven Marketing

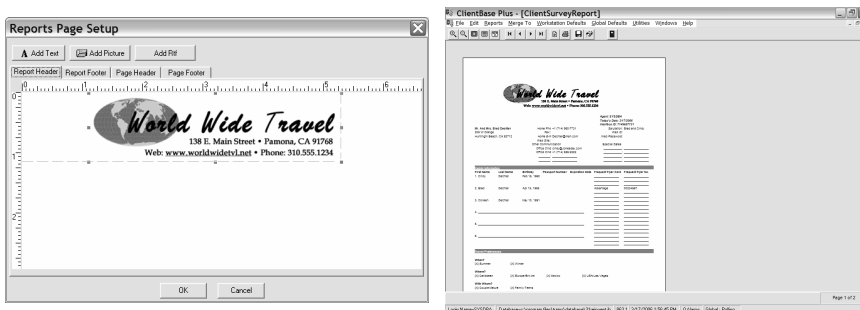
1.) Polish your Brand and Logo and make sure all agency collateral reflects it.



Use Headers and Footers to customize Document Templates.

Agency Driven Marketing

1.) Polish your Brand and Logo and make sure all agency collateral reflects it.



Use Headers and Footers to customize Travel Surveys.

Agency Driven Marketing

2.) Market Your Agency and Agent Services/Expertise, not just your Vendors.



Put Your Promotion Title and Destination Here
 Departure City, State
 \$Price Here

Dates and Ship Here
Trip duration and Itinerary Here
 Info about Promotion Here
 and Here

Book now! Hurry, this Rate won't last!

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Knowledge Travel Services We provide them all.

Are We There Yet?

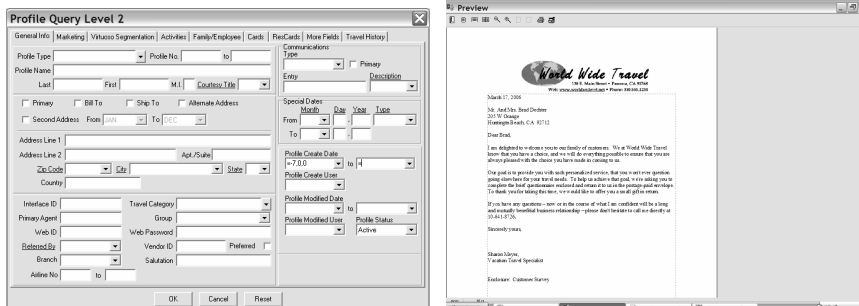
OUR TRAVEL EXPERTISE ...
 YOUR GOOD FORTUNE!

Good Fortune

Use Custom Templates to create marketing materials focusing on your agency's services.

Agency Driven Marketing

3.) Mine your database for relationship building opportunities.



Profile Query Level 2

General Info | Marketing | Visitor Segmentation | Activities | Family/Employee | Cards | Res/Cards | More Fields | Travel History

Profile Type: [] Profile No: []

Profile Name: Last [] First [] MI [] Country/Title []

Primary Bill To Ship To Alternate Address

Second Address From [] To []

Address Line 1 [] Apt./Suite []

Address Line 2 []

Zip Code [] City [] State [] Country []

Interface ID [] Travel Category []

Primary Agent [] Group []

Web ID [] Web Password []

Referred By [] Vendor ID [] Preferred []

Branch [] Salutation []

Address No. [] to []

Special Dates: Month [] Day [] Year [] Type []

From [] To []

Public Create Date: [] to []

Public Create User: []

Public Modified Date: [] to []

Public Modified User: []

Public Status: []

OK Cancel Reset

Preview

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 138 E Main Street - Pomona, CA 91768
 www.worldwidetravel.com

Dear [Name],

I am delighted to welcome you to our family of customers. We at World Wide Travel know that you're a special, and we're doing everything possible to ensure that your experience with us is the best one you can have.

Our goal is to provide you with the best possible service. We are well-known for providing excellent service to our customers. We hope to achieve that goal, and we thank you for choosing World Wide Travel for your travel needs.

If you have any questions, even in the context of what I've outlined, we'll be happy to help and usually respond to your inquiries as quickly as possible.

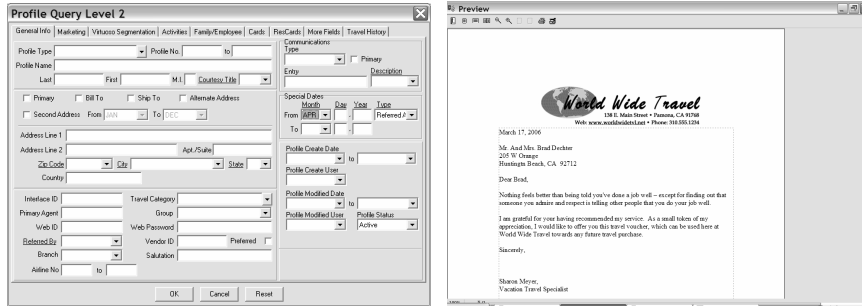
Sincerely yours,
 [Name]
 World Wide Travel Specialist

Feedback Custom Query

Welcome new customers to your agency.

Agency Driven Marketing

3.) Mine your database for relationship building opportunities.



Thank customers who refer you to others.

Agency Driven Marketing

3.) Mine your database for relationship building opportunities.

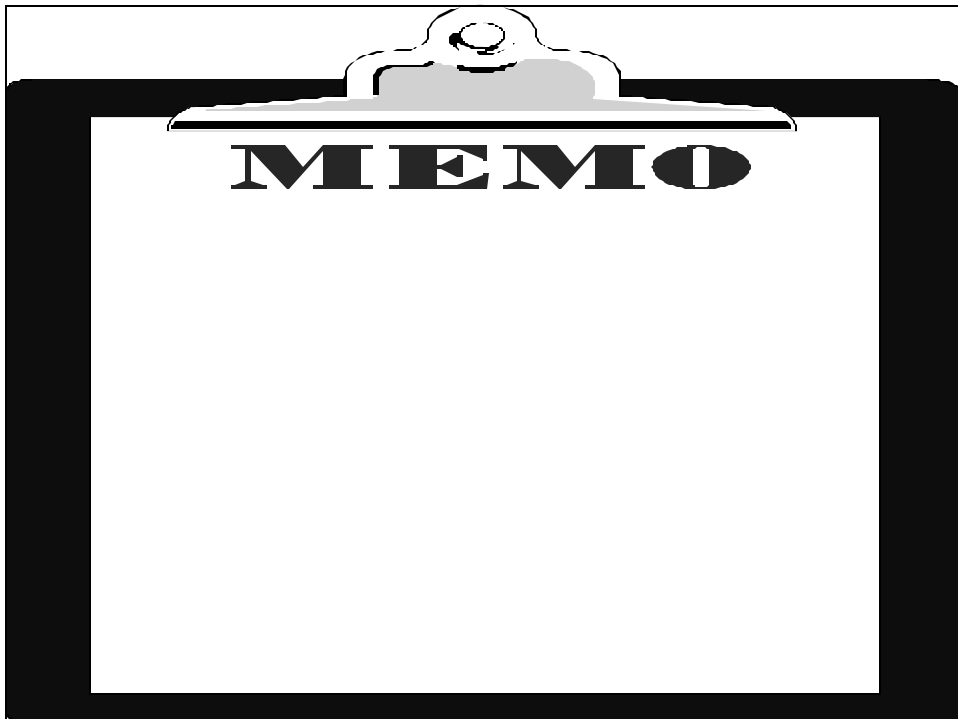


Send Welcome Home Letters.

Agency Driven Marketing

3.) Mine your database for relationship building opportunities.

- Ideas are limitless:
 - Trip Anniversary Cards
 - Pre-Trip E-mail
 - Forget Me Not
- Agents Can Handle Individually
- Marketing Managers Can Handle in Mass
 - Queries
 - Reminders





Tips and Tricks: ClientBase

- ☑ Create Mailers and use Consistent Subjects
- ☑ Save Queries/Use Date Formulas
- ☑ Marketing by Passenger
- ☑ All Caps is a no-no
- ☑ Use Required Fields...but carefully
- ☑ Salutation – Important field
- ☑ Identify your agency in the From Email address:
World Wide Travel<email@worldwide.com>
- ☑ Do not use BCC method
- ☑ Reset Connection Every X e-mails



Tips and Tricks: E-mail

- ☑ Short and sweet - too many scrolls loose your client
- ☑ CAN-SPAM ACT 2003 (Applies to Promotional vs. Transactional e-mails)
 - The “From” and “Subject” can not be deceptive or misleading
 - A valid physical postal address for the sender - P.O. Box may not qualify
 - Recommend adding a phone number as well
 - A functioning return e-mail address
 - A functioning opt-out/unsubscribe mechanism
Clients must be removed from the list with-in 10 days



Tips and Tricks: E-mail

- ☑ Always include a text version of your email with the HTML version
- ☑ Choose your Subject Lines Carefully:
 - Avoid Spam trigger words: Sales, Deals, Greatest, etc.
 - No characters/symbols &, _, -, #, *
 - Do not use all capital letters
 - No ' ! '
- ☑ Watch your font sizes (3 or smaller) and number of ! in the body of your html email



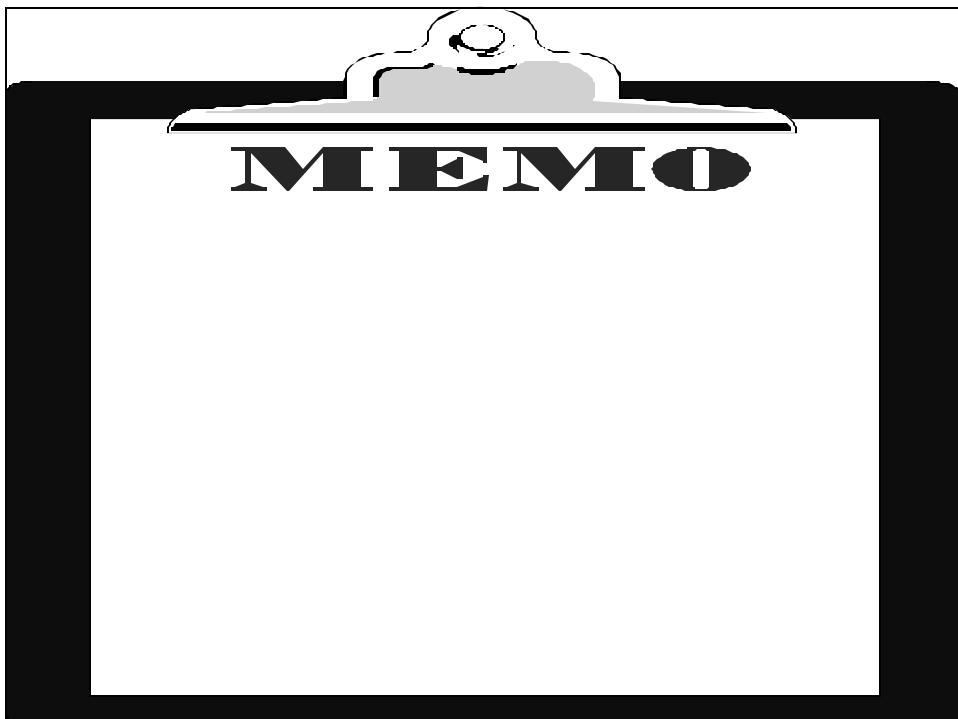
Tips and Tricks: Sources for Client Lists

- ☑ Your Frontline Agents!!!
- ☑ Advertising: Radio, Newspaper, Yellow Pages, Local Sponsoring etc.
- ☑ Web Site
- ☑ Purchase Lists
- ☑ Partner with local businesses
- ☑ Attend niche expo's
- ☑ Bridal Fairs
- ☑ Welcome Wagon
- ☑ County Assessors Office
- ☑ Corporate Clients






Tips and Tricks: Sources for Marketing Content

- ☑ Your Preferred Vendors
- ☑ Your Consortia
- ☑ TRAMS Marketing Advantage (TMA)
- ☑ Passport On-line
- ☑ AIPlus (www.myagencyinc.com)
- ☑ Create custom agency templates





Q & A Ask the Experts

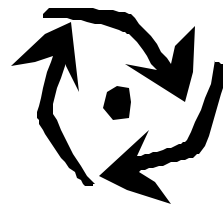
-  Lee Rosen, President TRAMS, Inc.
-  Lindsay Chomyn, Dir Operations, TMA
-  Dan Palley, TRAMS CTO

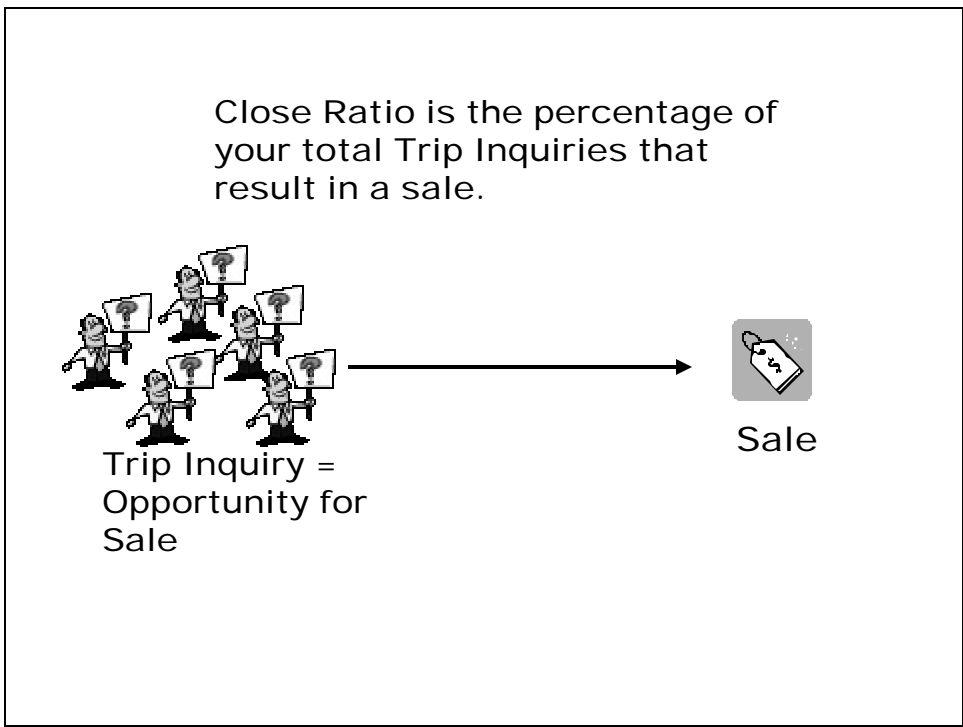
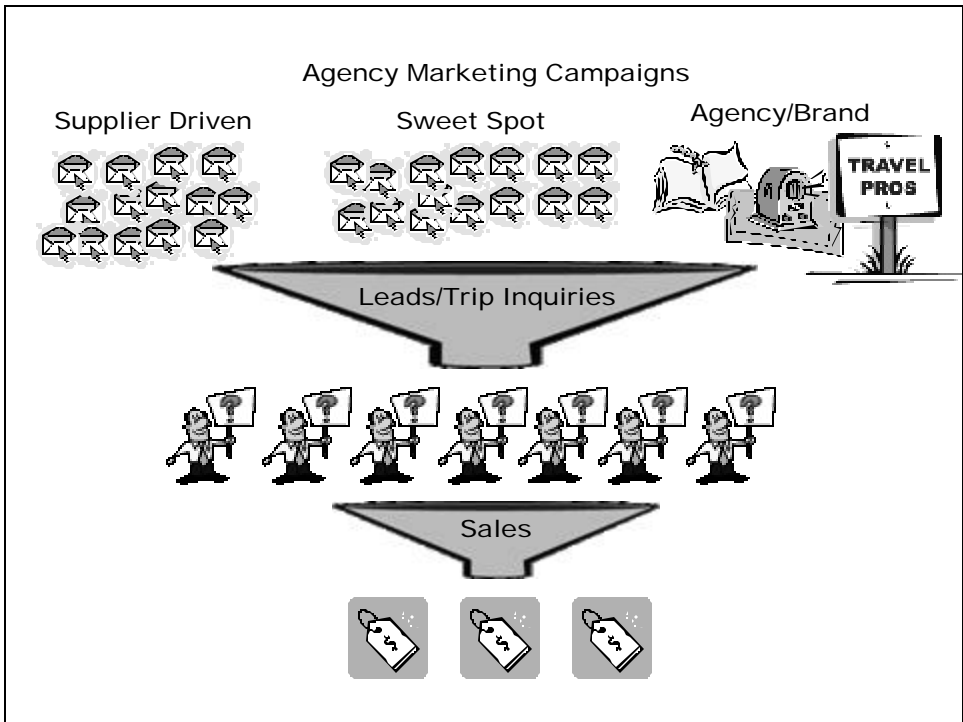
Introduction to Agent Sales



Close More Sales

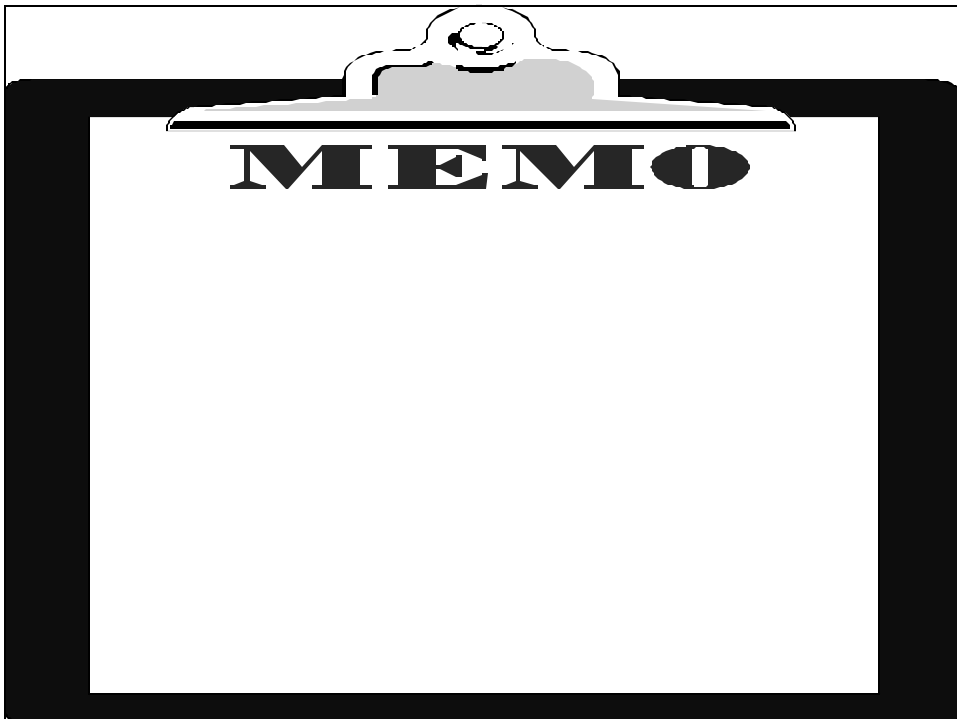
-  Marketing
-  Sales
-  Service
-  Processing

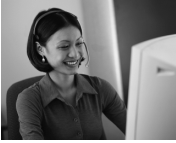




Close More Sales

1,000	Leads	1,100	1,000
10%	Close Ratio	10%	20%
\$100,000	Gross (\$1,000)	\$110,000	\$200,000
\$2,000	Net (2%)	\$2,200 (+10%)	\$4,000 (+100%)





Sales Activities

- Structure Your Agents' Sales Activities
 - Document Each Inquiry
 - Use and Update Profile Data
 - Use Reminders / Track Sales Cycle

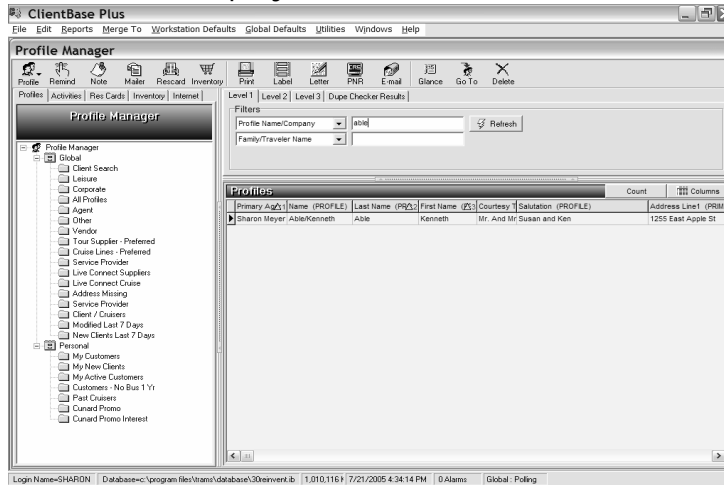
Sales Activities

- Structure Your Agents' Sales Activities
 - Document Each Inquiry



Structure Your Agents' Sales Activities

Document each inquiry.

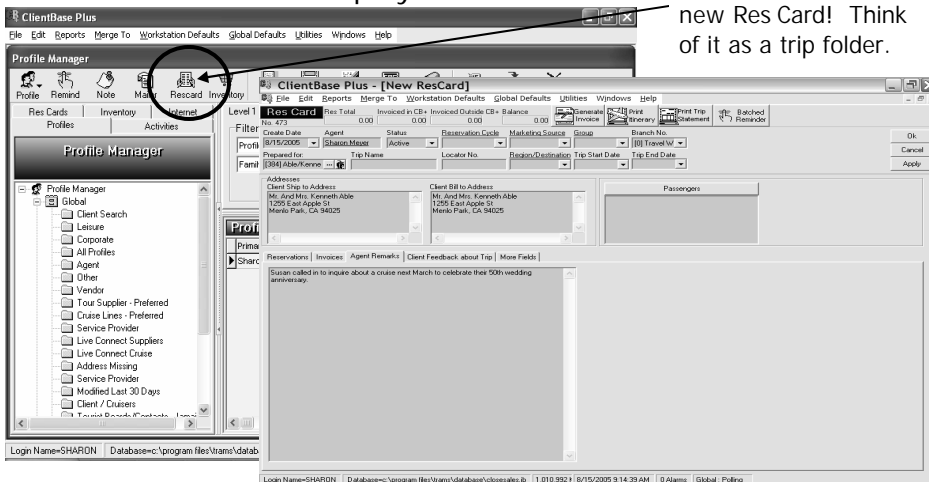


Locate your client's profile using Profile Manager Query

Structure Your Agents' Sales Activities

Document each inquiry.

One click to create a new Res Card! Think of it as a trip folder.



Use Res Card as scratch pad for all trip notes.

Sales Activities

– Structure Your Agents' Pre-Sale Activity

- Document Each Inquiry
- Use and Update Profile Data



Structure Your Agents' Sales Activities

Use and update profile data.

ClientBase Plus - [Dechter/Brad - LEISURE]

Quick View FR To Screen

Mr. and Mrs. Brad Dechter
 205 W Orange
 Huntington Beach, CA 92712

Home Phone +1 (714) 960-7732 Primary Agent Sharon Meyer
 Home E-mail Dechter@mson.com Created On 10/21/1997
 Salutation Brad and Cindy ing Anniversary Apr ??

Marketing Info (Travel Preferences)

When?	Summer
When?	Winter
When?	Caribbean
Where?	Europe/UK/Ireland/France
Where?	Mexico
Where?	USA/Hawaii
Where?	USA/Las Vegas
With Whom?	Couple/Mature
With Whom?	Family/Teens
What Type?	All-Inclusive
What Type?	Cruise

Passenger Details

Relate	Name	Age	Birthday
Spouse	Dechter/Cindy	48	February 15, 1960
Primary	Dechter/Brad	48	April 18, 1958
Daughter	Dechter/Cali	15	May 15, 1991

Remarks

Susan Thomas's cousin. Has a fear of being hit down anyway.
 Love Disney.

Travel History (Last 16 Purchases)

Type	Issue Date	Tvl Cate.	Itinerary	Vendor	Depart	Total Fare	Comms.	Pass
Sale	8/17/2008	Tour	LAXLCL	Fungal Vacations	11/4/2008	200.00	0	Dech
Sale	8/16/2004	Tour	LAXLAL	Fungal Vacations	10/25/02	200.00	0	Dech
Sale	3/10/2004	Tour	LAXLRL	Trafalgar Tours	3/19/2004	10212.40	45.50	Dech
Sale	3/13/2003	Tour	LAXHLR	United Vacations	5/24/2003	1000.00	0	Dech
Sale	3/10/2003	Tour	LAXHLR	United Vacations	5/24/2003	1253.00	1369.42	Dech
Sale	7/28/2002	Air	LAXMCO	American Airlines	11/14/02	7871.00	0	Dech

FF's and Credit Cards

Type	C.	Number	Exp Date	Name on Acct
Frequent Flyer	UA	80234567		Brad Dechter
Car Program	ZZ	420543		Brad Dechter

Active Res Cards (Current Trips in Planning Stage)

Start Date	Create	Create Ag.	Res Cycle	Trip Name	Region	Group
2/1/2007	1019	Sharon M.	Under Considera...	Hawaii Annivers...	Mexico	
2/1/2007	1059	Sharon M.	Booked	Carson Getaway	Mexico	

Mailers (Last 10 Mailings to Customer)

User	Date/Time	Subject	Remarks	Comp
SHARON	3/26/2006	Madeleine Adventures in Paris & London	The World of Ma...	
SHARON	3/14/2006	Barge - Provence France	Description of w...	
SHARON	3/10/2004	Cartier to Bed		

Open Reminders (Future Tasks)

User No.	Date/Time	Subject	Remarks
SHARON	2/10/2007	Make Welcome Home Phone Call	
SHARON	2/10/2007	Send Welcome Home Postcard	
SHARON	1/10/2007	Washer Coordinates the Trips	

Login Name=SHARON | Database=c:\program files\ibeam\database\closebase32.b | 9523 | 11/2/2008 10:20:53 AM | 0Alams | Global | IBEvent

Use Quick View to access client details necessary during sales process.

Structure Your Agents' Sales Activities

Use and update profile data.

The screenshot shows the 'Leisure' profile page in ClientBase Plus. The profile information includes contact details for Mr. and Mrs. Kenneth Able and Sharon Mey. Below the profile info, there is a 'Travel History' tab selected, displaying a table of travel activities.

ISSUEDATE	Total Fare	Vendor	INVOICENUM	INVTYPER	TRAVELCATEGORY	CLIENTPAYSTATUS	VENDORPAYSTATUS	FIRSTIN
2/16/2005	940.00	Celebrity Cruises	100236	Sale	Cruise	Closed	Open	James Si
12/13/2004	200.00	Celebrity Cruises	100217	Sale	Cruise	N/A	Open	James Si

Use Travel History

Structure Your Agents' Sales Activities

Use and update profile data.

The screenshot shows the 'Family Members' tab selected in the 'Leisure' profile. It displays a table of family members with columns for Age, Relationship, Name, Last Name, First Name, Smoking, and Cruise Size. There are also buttons for 'Add', 'Modify', and 'Delete'.

Age	Relationship	Name	Last Name	First Name	Smoking	Cruise Size	Cruis
73	Spouse	Able/Susan	Able	Susan		Small to Late	Late
74	Primary	Able/Ken	Able	Ken		Small to Late	Late
44	Son	Able/Bill	Able	Bill			

Use and update Family Member details

Structure Your Agents' Sales Activities

Use and update profile data.

ClientBase Plus - [Able/Kenneth - LEISURE]

Mr. And Mrs. Kenneth Able
1255 East Apple St
Menlo Park, CA 94025

Home +1 (650) 988-1345
Direct line +1 (480) 111-3333
billia@aol.com
E-mail kena@aol.com
Interface ID: 6509881222

Primary Agent Sharon Mey
Created 10/21/1997
Groups
Profile No. 384

General Info | Remarks | Marketing | Family Members | Activities | Travel History | Cards | ResCards | Payment History | Attachments | PNR Entries | More

1. When? Spring Summer Fall Winter Last Minute No History 3 yrs

2. Where? Africa Asia Australia/New Zealand Bermuda Canada Caribbean Central/So America Europe/Eastern Europe/Brit.Ireland,Fi Europe/Mediter Europe/Scandinavia

3. With Whom? Single:Mature Single:Scitizen Single:Parent Couple:Young Couple:Mature Couple:Scitizen Family:Young Family:Teens Single:Young

4. What Type? Cruise Motor Coach Tour Package All-Inclusive Visits Friends/Relat

5. What Interests? Golfing Hiking/Walking Museum Music Shopping Skiing Snorkeling/Scuba Spa/Health Sun/Beach Tennis Helicopter Skiing

6. What Budget? Economy Moderate Deluxe

7. Client Status Prospect Client Advocate VIP

8. Complex Queries No History 3 yrs Exclude/Include Exp

Login Name=SHARON Database=c:\program files\trams\database\30\eirventw 765,808 KB 7/11/2005 11:14:53 AM 0 Alarms Global : Polling

Use and update Marketing Information

Structure Your Agents' Sales Activities

Use and update profile data.

ClientBase Plus - [Able/Kenneth - LEISURE]

Mr. And Mrs. Kenneth Able
1255 East Apple St
Menlo Park, CA 94025

Home +1 (650) 988-1345
Direct line +1 (480) 111-3333
susan@aol.com
E-mail kena@aol.com
Interface ID: 6509881222

Primary Agent Sharon Mey
Created 10/21/1997
Groups
Profile No. 384

General Info | Remarks | Marketing | Family Members | Activities | Travel History | Cards | ResCards | Payment History | Attachments | PNR Entries | More Fields | Groups

Type Leisure

Last Name First M.I. Courtesy Title Mr. And Mrs.

Address Line 1 Primary, Bill To, Ship To

Address Line 2 1255 East Apple St Apt/Suite

Zip Code 94025 City Menlo Park State CA Country

Interface ID 6509881222 Primary Agent Sharon Mey

Branch No [01] Travel With 1 Salutation Susan and Ken

Referenced By Web In Web ID Web Paved

Profile Last Modified SHARON 2/27/2006 1:24:03 PM

Communications
*P +1 (650) 988-1345 Home
*F +1 (480) 111-3333 Direct line
E susan@aol.com
*E-mail kena@aol.com
*Web Site Additional Communications

Special Dates
Month Day Year Type
MAY 02 1996 Wedding Ar

Additional Special Dates
Create Date 10/21/1997 Profile Status
Create User SYDBEA Active

Login Name=SHARON Database=c:\program files\trams\database\30\salesales.b 832.9 2/27/2006 2:11:07 PM 0 Alarms Global : Polling

Use and update General Information

Structure Your Agents' Sales Activities

Use and update profile data.

The screenshot shows the 'ClientBase Plus - [New ResCard]' window. The 'Res Card' tab is active, displaying client information for 'Mr. and Mrs. Kenneth Able' at '1255 East Apple St, Menlo Park, CA 94025'. The agent is 'Sharon Meyer' with status 'Active'. The reservation is for 'Hawaii' with a start date of '8/15/2005'. A 'Remarks' section at the bottom contains the text: 'Susan called in to inquire about a cruise next March to celebrate their 50th wedding anniversary. Anniversary is March 20th. Thinking Hawaii/Tahiti. Reviewed Radisson Seven Seas and sent home with brochure. Wants to discuss further with Ken.'

Use Res Card Remarks for Documenting what you Learn

Sales Activities

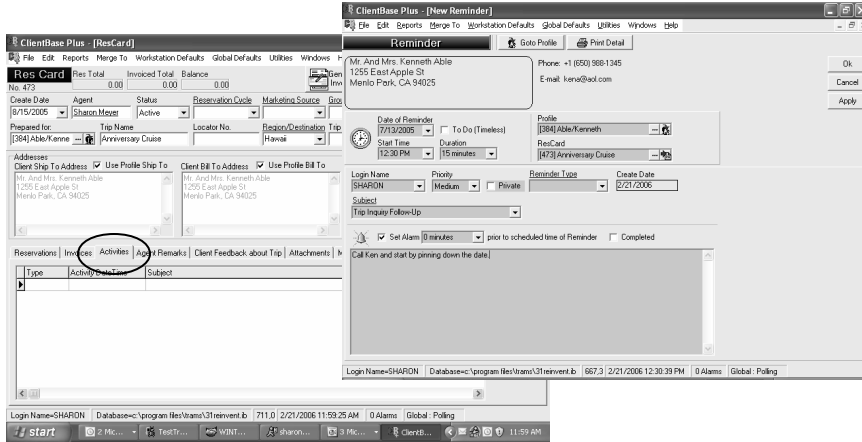
– Structure Your Agents' Sales Activities

- Document Each Inquiry
- Use and Update Profile Data
- Use Reminders / Track Sales Cycle



Structure Your Agents' Sales Activities

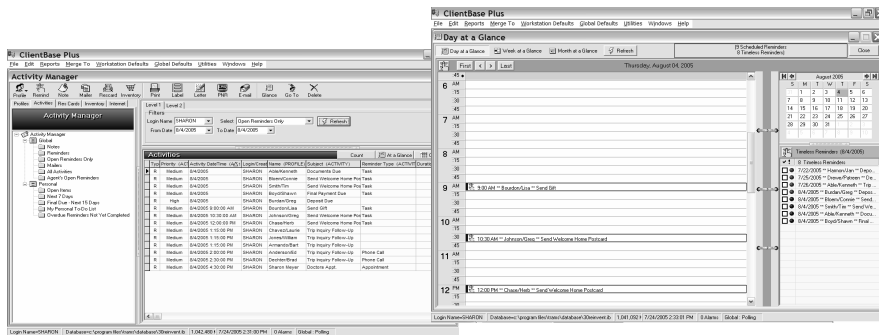
Use Reminders to schedule next follow-up.



Create Reminders right from the Res Card

Structure Your Agents' Pre-Sale Activity

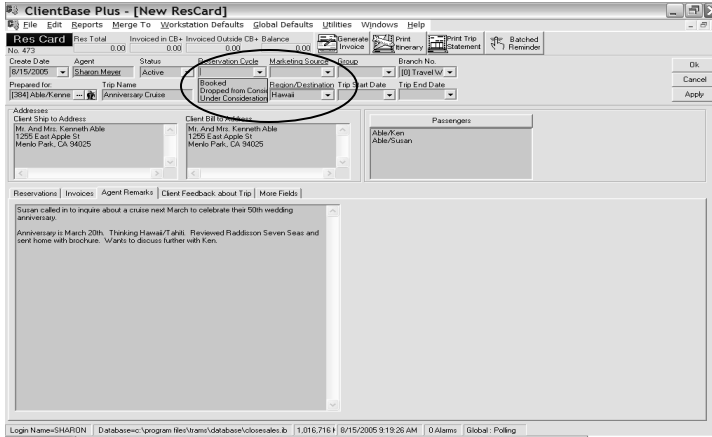
Use Reminders to schedule next follow-up.



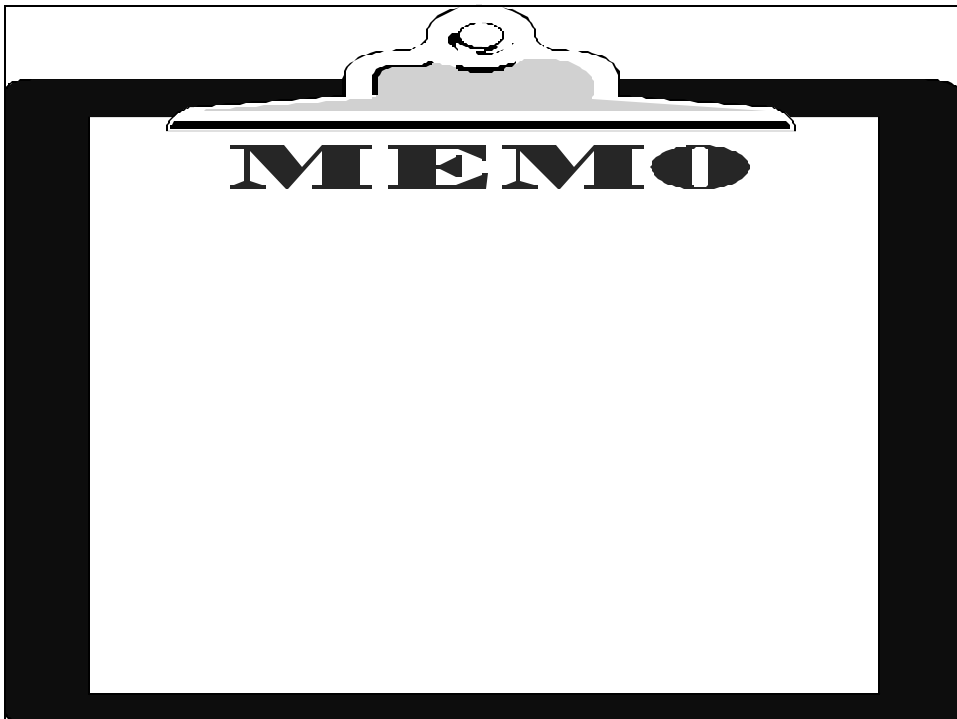
Work from a daily to-do list and day planner

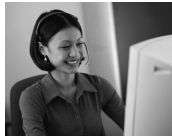
Structure Your Agents' Pre-Sale Activity

Track the Sales Cycle.



Use "Res Cycle" to document status of sales progress





Pre-Sale Activities

- Structure Your Agents' Pre-Sale Activity
- Manage Your Trip Inquiries



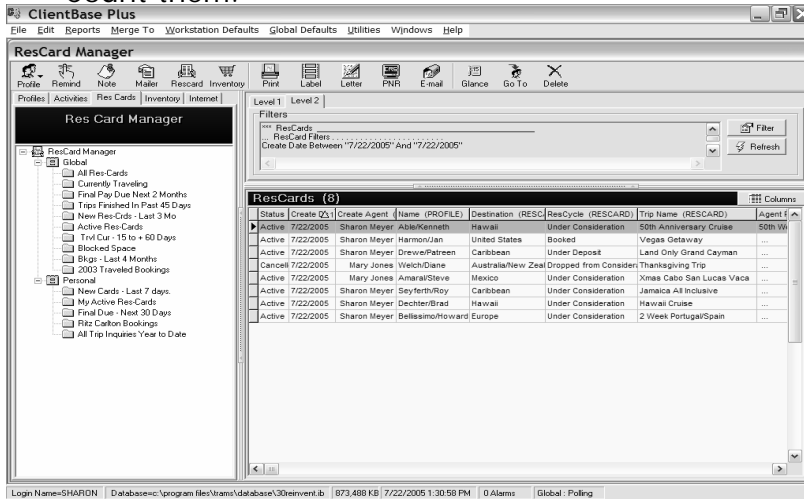
Manage your Trip Inquiries

Count them.

Use Res Card Manager Queries

Manage your Trip Inquiries

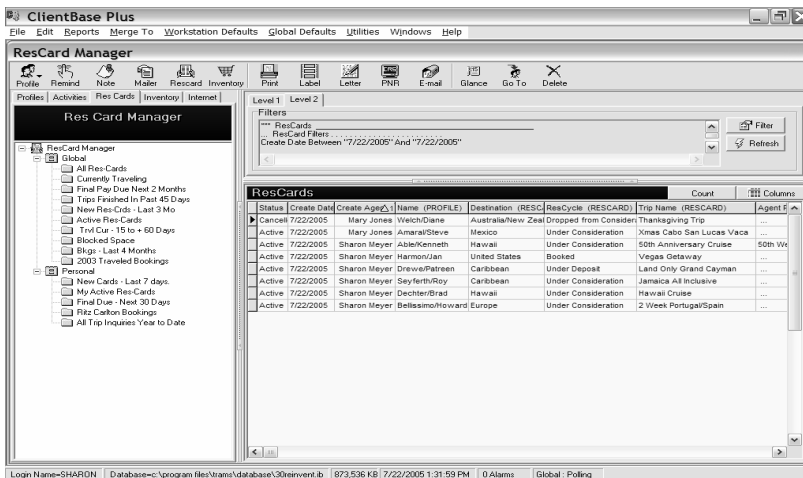
Count them.



Count by Agency

Manage your Trip Inquiries

Count them.



Sort by Agent

Manage your Trip Inquiries

Count them.

Report: Agent Statistics
Agent: SHARON
Date/Time: 7/22/2005 1:34:01 PM
Filter: *** ResCards
ResCard Filters
Create Date Between "7/22/2005" And "7/22/2005"
*** General Info
Profile Status Is Equal to Active

Many Issues	Query Results	Matches	% of Results	Average # of Days
Booked	2	0	0%	0
Cancelled	2	0	0%	0
Dropped from Consideration	2	1	50.00%	0
Paid in Full	2	0	0%	0
Returned from Trip	2	0	0%	0
Under Consideration	2	1	50.00%	0
Under Deposit	2	0	0%	0

Sharon Mayer	Query Results	Matches	% of Results	Average # of Days
Booked	6	1	16.67%	4
Cancelled	6	0	0%	0
Dropped from Consideration	6	0	0%	0
Paid in Full	6	0	0%	0
Returned from Trip	6	0	0%	0
Under Consideration	6	4	66.67%	0
Under Deposit	6	1	16.67%	7

Page 1 of 1

Report by Agent and Reservation Cycle

Manage your Trip Inquiries

Monitor them.

ResCard Manager

ResCard: No. 456
Create Date: 7/22/2005
Agent: Sharon Mayer
Status: Active
Registration Cycle: Under Consideration
Marketing Source: [0] Traveler
Issue: [0] Traveler
Branch No.: [0] Traveler

Prepared for: [304] Ade.Kenne
Tip Name: 50th Anniversary Cruise
Locator No.: [Home]

Address: Mr. and Mrs. Kenneth Able
1205 East Apple St.
Merido Park, CA 94025

Client Bill to Address: Mr. and Mrs. Kenneth Able
1205 East Apple St.
Merido Park, CA 94025

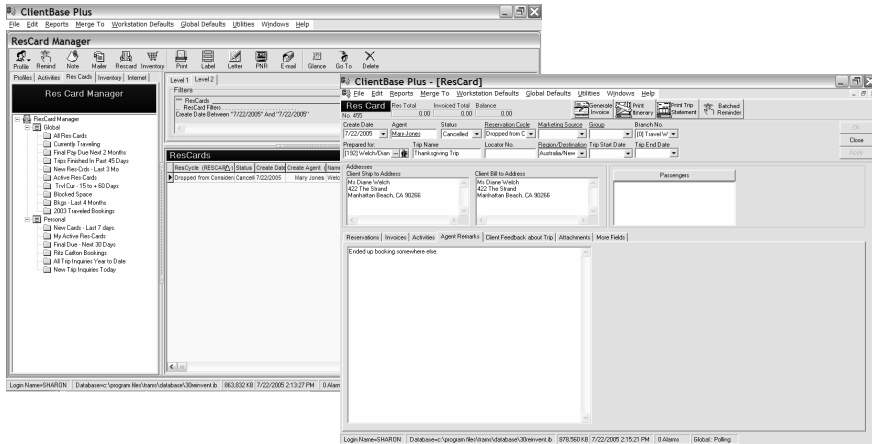
Passengers: Ade.Yen, Ade.Susan

Type	Activity	Duration	Subject	Priority	Log#/Created Name	Create Date	Private	Duration	Add	Modify	Delete	Refresh	Batched	Reminded
R		7/26/2005	Trip Inquiry Follow-Up	High	SHARON	7/22/2005 1:35:51 PM	No							

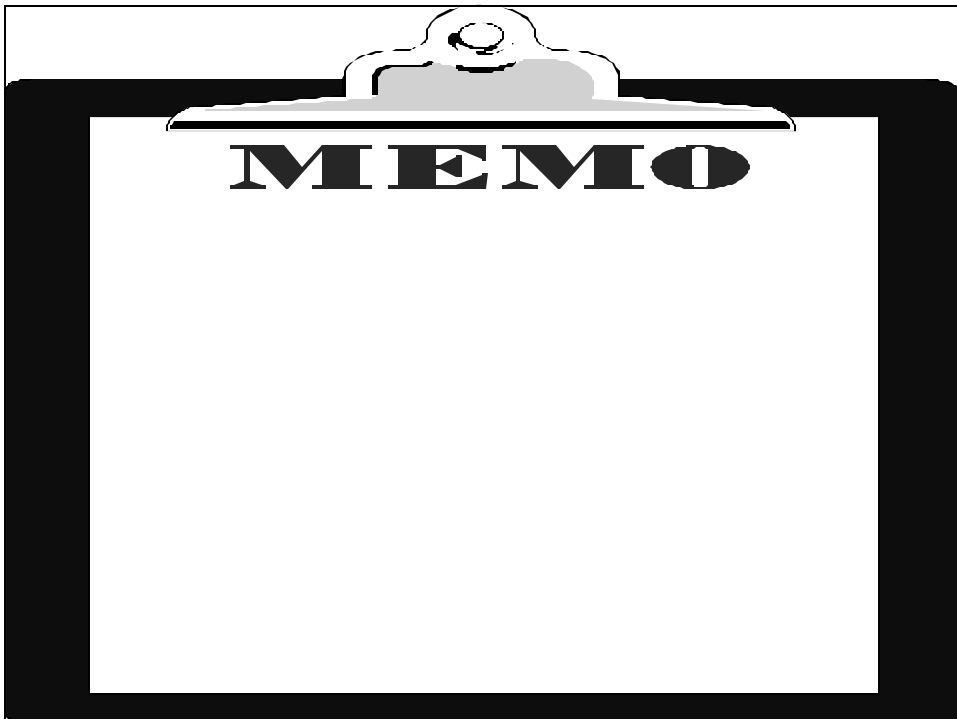
Verify follow-up Reminders are in place for those still "Under Consideration".

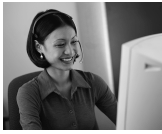
Manage your Trip Inquiries

Monitor them.



Learn from and continue marketing to those "Dropped from Consideration".





Pre-Sale Activities

- Structure Your Agents' Pre-Sale Activity
- Manage Your Trip Inquiries
- Track Closing Ratios

Track Closing Ratios

1,000	Leads	1,100	1,000
10%	Close Ratio	10%	20%
\$100,000	Gross (\$1,000)	\$110,000	\$200,000
\$2,000	Net (2%)	\$2,200 (+10%)	\$4,000 (+100%)



Track Closing Ratios

Run the Close Ratio Report (Reports|Res Card|Close Ratio)

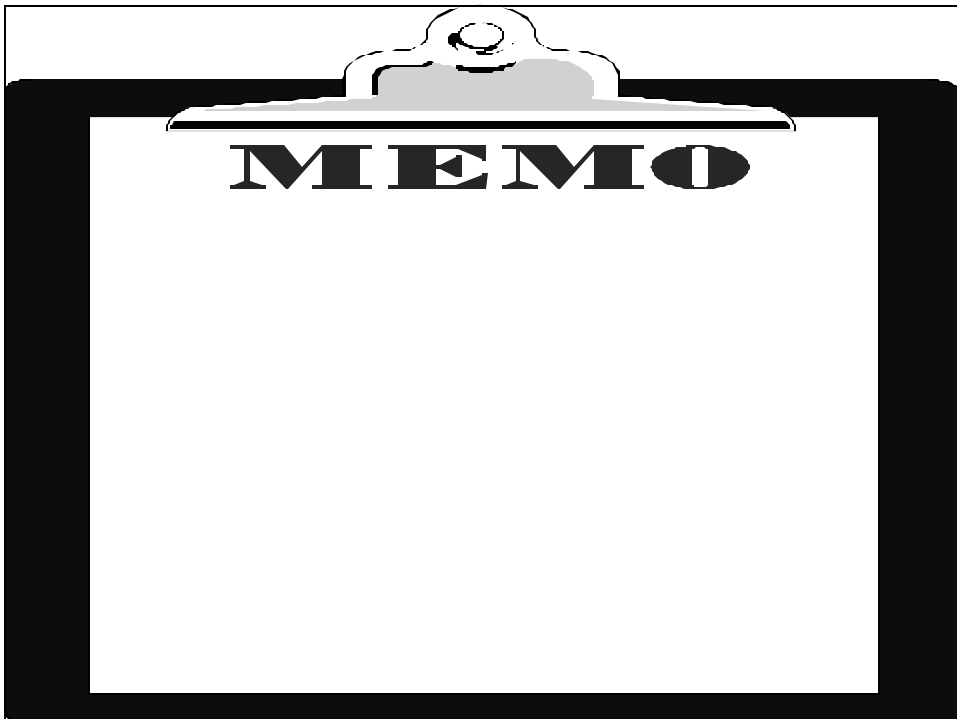
ClientBase Plus - [CloseRatioReportBasedOnConfirmedReservations]

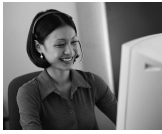
Report: Close Ratio Report Based on Confirmed Reservations
Agent: SHARON
Date/Time: 2/27/2006 2:09:38 PM
Filter: *** ResCards
ResCard Filters: - "1/1/2006" And "-" [2/27/2006]
*** General Info
Profile Status is Equal to Active

Agent Name	Total ResCards	With Reservations	Without Reservations	Close Ratio	Avg. Days To Close	Avg. Trip Total	Avg. Trip Commission
Mary Jones	7	3	4	42.9%	9	3,060.20	294.86
Sharon Mayer	14	10	4	71.4%	3	6,215.56	665.57
Totals:	21	13	8	61.9%	4	5,487.40	580.02

Page 1 of 1

Login Name: SHARON | Database: c:\program files\trams\database\closeales.db | 854.0 | 2/27/2006 2:05:44 PM | 0 Alarms | Global: Polling





Pre-Sale Activities

- Structure Your Agents' Pre-Sale Activity
- Manage Your Trip Inquiries
- Track Closing Ratios
- Create a Sales Formula



Create a Sales "Formula"

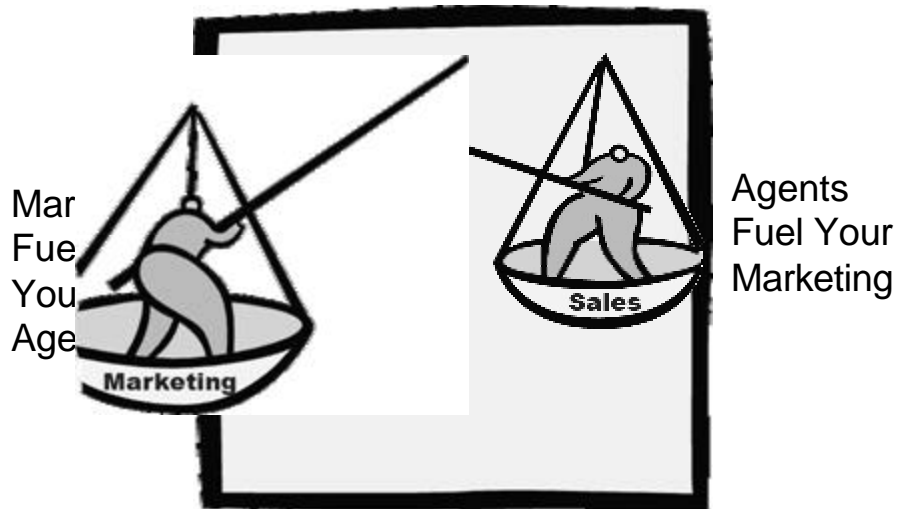
Use "Batched Reminders" to direct your agents to use a consistent follow-up plan.

The screenshot shows the 'Batch Reminder' dialog box in the ClientBase Plus software. The dialog box has a title bar 'Batch Reminder' and a close button. Below the title bar, there are fields for 'Batch Reminder Name' (Sales Formula) and 'Description' (3, 5, 7, 14 process). A table lists the reminders to be created:

Selected	Date of Rem	Start Time	Reminder Type	Subject	Duration	Timeless	Add
<input checked="" type="checkbox"/>	7/25/2005		Task	Trip Inquiry Follow-U		Yes	
<input checked="" type="checkbox"/>	7/27/2005		Task	Trip Inquiry Follow-U		Yes	
<input checked="" type="checkbox"/>	7/28/2005		Task	Trip Inquiry Follow-U		Yes	
<input checked="" type="checkbox"/>	8/5/2005		Task	Trip Inquiry Follow-U		Yes	

At the bottom of the dialog box, there are 'Create Reminders' and 'Cancel' buttons. The 'Create Reminders' button is circled in red. The background shows the main software interface with a 'Res Card' for 'Mr. and Mrs. Steve Amoral' and various menu options like 'File', 'Edit', 'Reports', etc.

Integral Role of Agents



Conclusion

"Experience has taught me that there is one chief reason why some people succeed and some people fail. The difference is not one of knowing but of doing. The successful man is not so superior in ability as in action. So far as success can be reduced to a formula it consists of this: doing what you know you should do."

Roger Babson - Philanthropist

Conclusion

For Best Sales...
Practice Best Management!





NOTES:

