

Using Queries with Best Marketing Practices in ClientBase Windows



ClientBase Managers

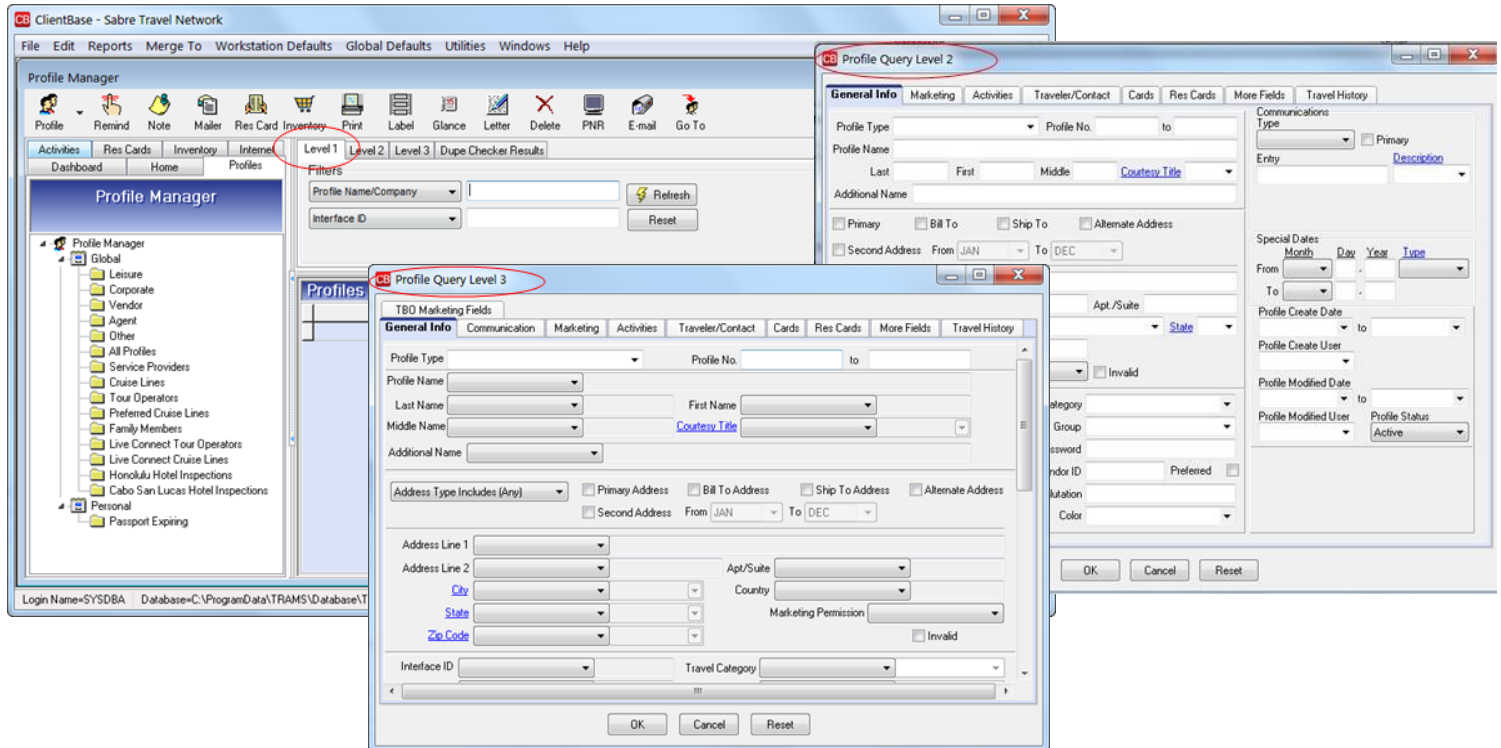
1. **Profile Manager** allows you to easily manage your profile data (Leisure, Corporate, Vendor, Agent and Other) and provides query filters and results listed by profile.
2. **Activity Manager** allows you to easily manage your Activity data (Notes, Reminders and Mailers) and provides query filters and results listed by Activity.
3. **Res Card Manager** allows you to easily manage your Res Card data and provides query filters and results listed by Res Card data.
4. **Internet Manager** allows you to seamlessly link to the Internet without leaving ClientBase or launching another browser application. Easily manage your Global and Personal Internet sites, by clicking on your saved folders to automatically launch your default browser and take you to the selected Web site.
5. **Inventory Manager** allows you to easily manage your inventory data and provides query filters and results listed by inventory items. The Inventory Manager comes with some Global default folders for your convenience including Air, Cruise, Hotel, Rail, Tour, and Misc.

The image displays five overlapping screenshots of the ClientBase software interface, demonstrating various management tools:

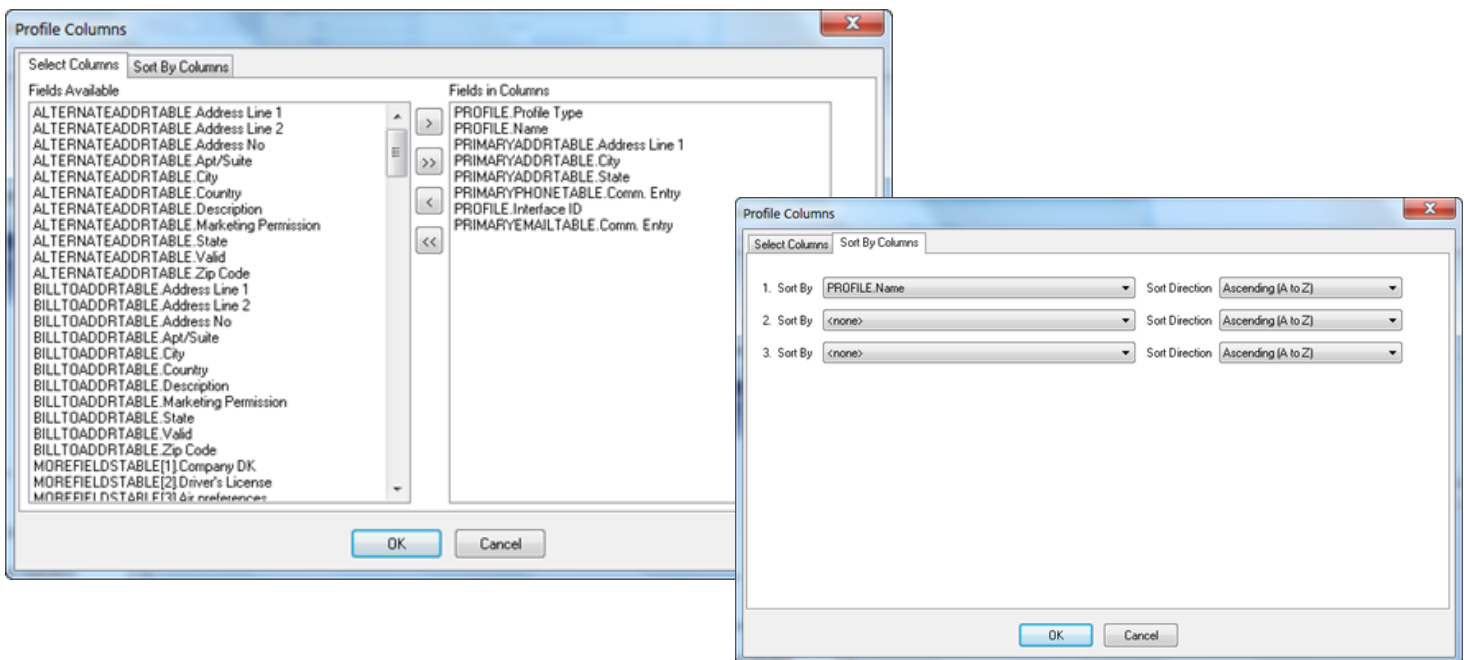
- Profile Manager:** Shows a list of profiles with columns for Name, Address, City, State, and Phone. The 'Leisure' profile type is selected.
- Activity Manager:** Displays a list of activities with columns for Type, Name, Activity Date, Subject, Reminder, Priority, and Duration. The 'Open Reminders Only' filter is applied.
- Res Card Manager:** Shows a list of Res Cards with columns for Status, Name, and Destination. The 'Active' status filter is selected.
- Internet Manager:** Displays a web browser interface for the Sabre Travel Network, showing navigation links and a search bar.
- Inventory Manager:** Shows a list of inventory items with columns for Travel, Blocked, Sold, Available, Vendor, Service Provider, Description, and Inventory ID. The 'Air' category is selected.

Level 1, 2 and 3 Queries

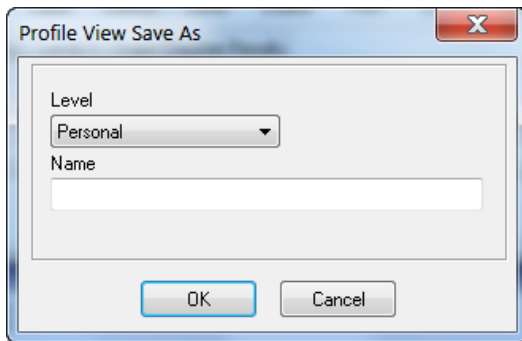
- Level 1 Query searches by up to 2 fields
- Level 2 Query searches by any number of fields, stringing criteria together with an “and”
- Level 3 Query strings multiple statements together with an “or”. Use search operators to define use of filter



- Customize what columns and sorts you want displayed in the Results Screen.



- Save frequently used customized folders



Use Date Formulas: Use date formulas so you only have to set up query folders one time for use.

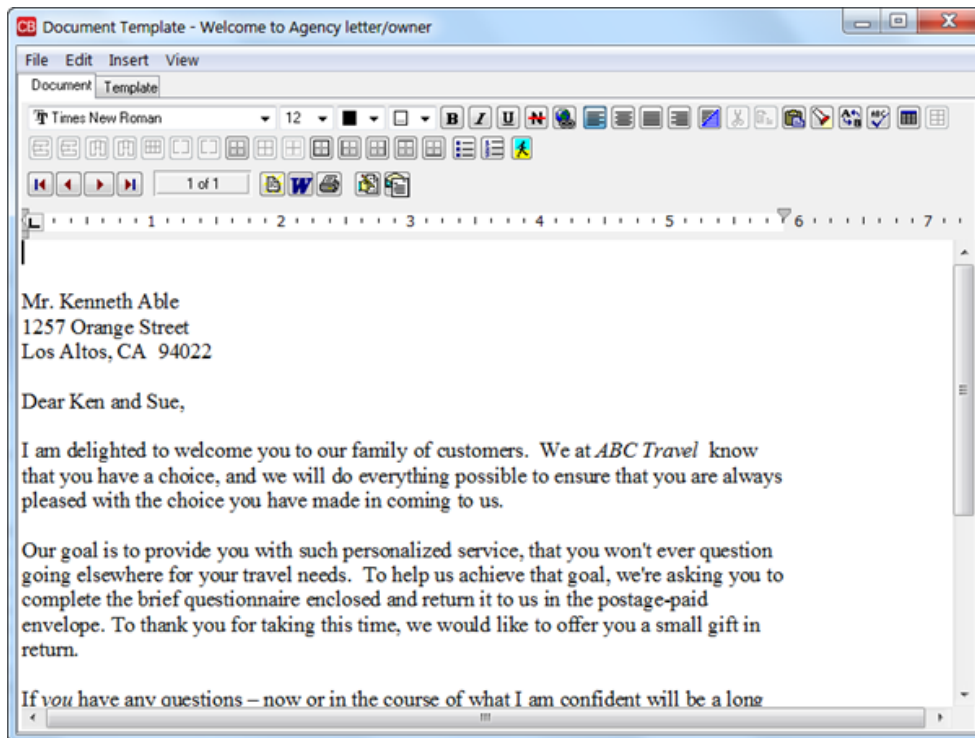
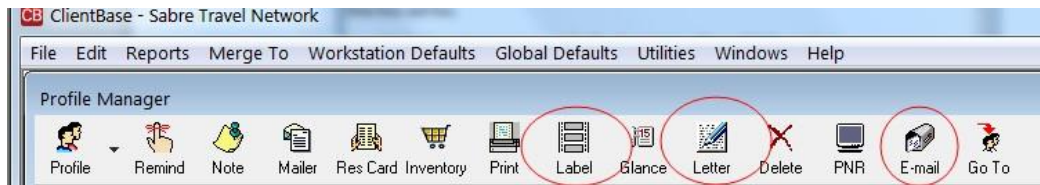
| Date Formulas - If You Want This | Enter This |
|--|------------|
| 1 st day of this month: | =1,0,0 |
| Last day of this month: | =31,0,0 |
| 1 st day of this year: | =1,1,0 |
| Last day of this year: | =31,12,0 |
| Seven days from now: | =+7,0,0 |
| Last Monday (will show today if today is Monday) | =Mon |
| A week from last Monday | =Mon-1 |
| Next Monday | =Mon+1 |
| Three months from now | =0,+3,0 |
| Six months ago: | =0,-6,0 |
| One year from now | =0,0,+1 |

Let's Practice:

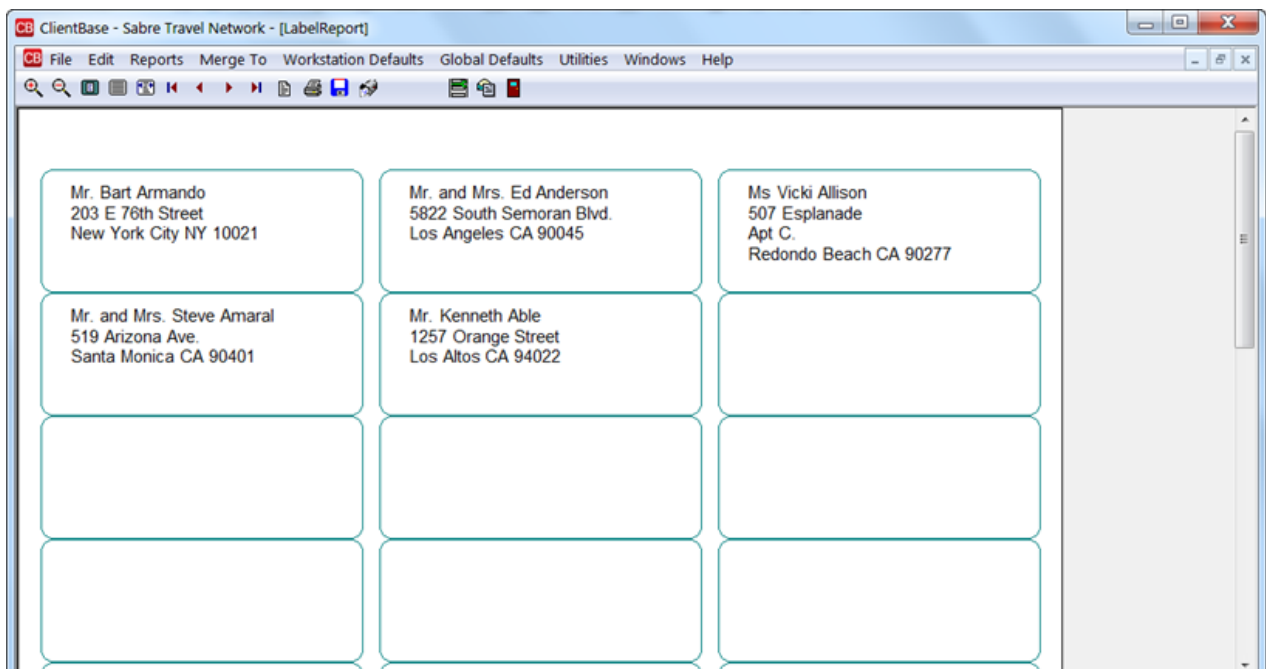
- ★ Using Level One Query, find all Leisure profiles with a specific zip code
- ★ Using Level Two Query, find all deluxe cruisers. Customize the query and save as a personal folder.
- ★ Using Level Two Query, find New Profiles Created Last Month & save w/date formulas. ★ Using Level Three Query, find all Leisure clients without emails.

Putting Profiles to Work for You

- **Merge to Letters, Emails, and Labels**
 - **Quickly and easily print a letter**
 - **Client data merges from the profile**
 - **Always create a mailer from document, label or email**



- **Merge to Label**



- **Merge to E-mail**

Create Mailer to track information. Available with Letters, Labels or emails.

Creates contact history in the Activity tab of profile.

- **Best Practices**

- You must set up Docs, Email Docs & Labels before using.
- Always print out or preview your letter, or send the email to yourself before sending to everyone.
- When you send a communication, create a mailer which resides as contact history in the client profile.
- Learn how to use the Activity Manager to see how successful your mailings are. Create 2 folders one for Not Responded and one for Responded, so you can track results.

Best Marketing Practices

- ★ **Best Marketing Practice #1:** Print individual Client Surveys when customers come into your office.
 - With each customer interaction, your agents should already be in the habit of retrieving the client profile.
 - While in the client profile click on the *Print* icon on the top toolbar and select *Client Survey*.
 - Print the survey and ask your client to take a quick moment to review and update if needed.
- ★ **Best Marketing Practice #2:** Take Time to find out how new customers heard about your agency. Run reports to see where advertising dollars are best spent.
 - Customize the drop-down list for the *Referred By* field located in the General Info folder of a client profile.
 - Go to **Global Defaults|Required Fields** and set the Referred By field to "Required". This way whenever a new client profile is created the agent is forced to complete this field.
 - After querying, go to **Reports|Profile Reports|Statistics|Referred By Statistics** to see what advertising dollars are proving worthwhile.
- ★ **Best Marketing Practice #3:** Send a Referral Thank You letter (or Email) to a customer who referred a new client to you.
 - If you are doing Best Practice #2, you may start to see that the best form of marketing is word of mouth. If so, be sure to thank customers who took the time to refer a new customer your way.
 - Customize a "Referral Thank You" letter/email by going to Global Defaults then Document Templates and loading or create a default template for editing.
 - If word of mouth is how a new customer heard about your agency, train your agents to find out exactly what customer sent them. Don't be afraid to say that you would like to thank that customer accordingly.
 - Create a reminder for the customer who referred the new business and select "Referred a Client" as the Reminder Type.
 - Once a week, or at least monthly, use the Level 2 Query to look up any customers who referred business your way.
 - From the Results of the Query, click *Merge to Letter* and select the *Referral Thank You* document template. Don't forget to create a mailer!
 - Recognition and a sincere thank you are the best kinds of reward.

Special Note: Some agencies like to keep track of which clients refer people to their agency. If that's the case, they could add a More Field and in the new profile have agents free-flow the name of the "Referrer". Then they can run a report with a list of names, a Travel History report, sort by Referrers, etc. Really understand who their "advocates" are and maybe periodically do something special for those people. I've also seen some agencies set that up as a Marketing Code where they could list their Referrers. And I've seen some people add it into the Remarks area.

- ★ **Best Marketing Practice #4:** Welcome Home Calls
 - Lots of agencies send welcome home letters/cards, but follow-up with a phone call.
 - Update Client Profile with Marketing Preferences, and the Res Card area with Client Feedback about trip.
 - Then you can query up past vendors to use for reference with other clients (demo Res Card Manager Level 2 Query to call up Hilton Waikoloa Village and see the client feedback about this vendor in res cards.
 - Ask when client is planning on going on next trip & set up a reminder to follow-up for your next sales lead.
- ★ **Best Marketing Practice #5:** Hand-write Birthday/Anniversary Cards
 - Using Level 2 Query, bring up birthday dates. (Show TCR Birthday Report that does this for you.)
 - Modify the columns to include Passenger Names.
 - Print out report.
 - Repeat for anniversaries.

Many of these marketing ideas can be done for you if you have enrolled to use [TouchBase program](#).

Such activities as Client Survey, Holiday emails, Welcome to the Agency, Bon Voyage, Welcome Home, Thank you for the Inquiry, Thank you for the Referral can be sent automatically for you using TouchBase. Contact your [Trams Sales Rep](#) for more details.