



## CLIENT DETAILS TO BOOK THEIR DREAM VACATION!

**YOU'LL BE SEEN AS THE EXPERT BY THE 'QUESTIONS YOU ASK' NOT BY WHAT YOU KNOW!  
AS A RESULT, YOU'LL HAVE MORE SUCCESS HELPING OTHERS GET WHAT THEY WANT.**

Repeat Client: THANK YOU for choosing to book your vacation with me again!

New Client: THANK YOU for meeting/calling me! How did you hear about my travel business?

IF the prospect asks why so many questions? So I find the best vacation/value/accommodations to fit your needs, wants, and budget.

### PERSONAL INFORMATION:

1. Full correct name, Family Member names, Address, Contact information
2. Passport #'s, Driver's License #'s, Frequent Travel #s
3. Dietary restrictions, special needs/preferences, what to avoid
4. List of past vacations
5. Wish list for future vacations, bucket list, dreams...
6. Places of employment, hobbies, best friends, any personal information about your clients to help you better understand their wants and needs
7. Are you active or retired military?
8. Frequent Traveler & Loyalty Numbers.
9. Be sure the passport never expires within 6 months

### PAST VACATIONS:

1. Where have you vacationed in the past? How long was your vacation?
2. Where did you stay?
3. Who/What are your preferred brands?
4. What did you like/love about the vacation(s)?

5. What didn't you like about the vacation(s)? Is there anything you'd never do again?
6. Who traveled with you?
7. Have you considered a group of F/F to all vac together?
8. Where have you booked your previous vacations? (TA, online, direct) How was the experience?
9. Is there anything else you'd like to share?

### **CURRENT VACATION PLANS:**

1. Why did you choose this destination/vacation?
2. Is there anyone else that will help make this vacation decision? (if so, plan a time for ALL to meet to talk about this vacation)
3. What is the primary reason for this vacation? Family time & relaxation? Touring & Site Seeing? Historical touring? Beach time? Hiking, biking? Couples Getaway?
4. Who else will be traveling with you?
5. What is most important to you to do on this vacation?
6. What else do you want included in this trip?
7. What do you NOT want in this vacation?
8. Do you prefer Flexible, or, Restrictive Fares?
9. Have you done any research? If so, what have you learned?
10. Do you have any concerns about traveling?
11. Is there anything else you want to include?
12. If want specific things, must book early! For example: cruising - trip/quad, early dining.

### **BUDGET/TIME:**

1. What is your budget, planned expenditure for this vacation?
2. How much time do you have for this vacation?
3. If we discuss a vacation needing a little more expenditure or time, do you have flexibility?

### **WHERE ARE GROUP OPPORTUNITIES?**

1. Family
2. Upcoming Celebrations?
3. Hobby/Passion
4. Work

5. Church
6. Areas of Specialization
7. Circle of Friends

### **LET ME SUMMARIZE, TO BE SURE I UNDERSTAND... DON'T BE AFRAID TO ASK MORE QUESTIONS!**

1. Summarize, and ask, did we cover everything you wanted to discuss?
2. I need to ask you more fact finding questions.
3. I'm not sure how to ask this ...

### **ADDITIONAL QUESTIONS YOU COULD ASK IF YOU NEED TO OBTAIN MORE INFORMATION:**

1. What does that vacation look & feel like?
2. Can you elaborate, tell me more?
3. Close your eyes. What are you thinking?
4. Is there anything else you want to share that we didn't discuss?
5. May I ask you a tough question?
6. On a scale of 1 to 10, how important is \_\_\_\_\_? If we were able to get that included, will you be ready to book?
7. If I find the right solution(s) will you be ready to take the next step? Or what do you see as the next step?
8. Yes, you found a less expensive option, but it's the bare bones/bottom line product, your expectations will not be met & you won't enjoy vacation. I would not book my family on this option.

### **BOOKING IS MADE- DETAIL FOLLOW UP STEPS:**

1. Documents, online check-in, shore excursions, transfers, Frequent Traveler #'s...
2. Bon Voyage or Vacation Gift?
3. Anyone else you want to invite to join you?
4. Ask for Referrals & Give business cards to your clients to give to others. Consider a thank you gift if a referral books & Deposits. (Logo gift, \$\$ off next booking with you)

### **DISCUSSED PLANS/TIME FRAME FOR NEXT VACATION:**

1. When do you think you'll plan your next vacation? (is it annual, a long weekend?)
2. What are you considering for that vacation?

3. What is the planned duration time?

### **FOLLOW UP:**

1. Thank you note & survey sent to be received at home upon return.
2. Call, how was vacation? (If needed time to address any concerns, take corrective action)
3. For your next vacation you're planning to (vacation plans) around (time frame). I will watch for specials & promotions, & will email & call you to begin planning.
4. If by chance you decide you need a getaway before this, remember I can book all travel. Please call me & I'll find you the perfect vacation for you vacation \$\$\$.

### **IF THE CLIENT DIDN'T BOOK TODAY:**

1. Let me summarize to be sure I understand ...
2. Is there any reason why you didn't book today?
3. Did I miss something important?
4. When will you be ready to book?
5. May I call you on (specific date) to talk about your vacation?