TBD Agent Best Practices

Important Restrictions

Recently several states have enacted “Seller of Travel” limitations with steep licensing fees to sell to their residents. Because of these restrictions, we are not able to accept payment from residents of Florida, Washington state, Delaware, or Hawaii. We should not be selling directly to or marketing to residents of those states.

Along those same lines, we are not able to sell directly to residents of foreign countries.

Communication

When communicating important information to clients, best practice is to communicate via email. Email is the best way to leave a conversation trail for reference, and most importantly, it time-stamps your message. I highly discourage you from dispensing important information to clients via text or Facebook Messenger, especially for important dates, amounts owed, and quotes. Any time you are making a reservation or payment on behalf of a client, it helps to protect you if their permission and approval are in writing on a time-stamped document.

Also, best practices dictate answering emails within 24 hours. If you expect to be unable to respond because you’ll be out of the office, please set up an “out-of-office” email that informs clients of delayed response time and provide your phone number (or another agent’s number if he or she agrees) for travel emergencies. You can also consider asking another agent for help in these situations, if he or she is available and willing to agree.

When communicating with me, it’s also helpful to do so via email. I am quick to respond to emails, and I do everything I can to help you in a timely manner! Texts are more easily missed and are sometimes just not the best format for a response. Our agency Facebook page is perfect for many questions, because the whole group can chime in if they like, and your question may help someone else!

Research and Resources

I am proud to be the owner of the agency and thankful to have you on board! My role in your professional life is to be an advisor through the process of booking travel. Your own experiences, professional judgement, and informed research should be the foundation of your small business. But when you have exhausted those resources and need someone to help you navigate the unknown, I am here!

Get to know the travel resources available in this document and the "Getting Started" document. Attend webinars and other trainings when you're able. Know where to find information about the destinations you're selling, and read as much as you can about a resort, cruise line, or other destination before booking it for a client. If you have questions, by all means, ask me or ask the group to narrow down the choices you have already researched on your own if needed. It's impossible to know everything that's out there, but it's important to know where to find information on your own when you need it!

Securely Handling Client Credit Card Information

Please use the following guidelines for your protection while handling client credit card information:

- Credit card numbers should only be taken over the phone or via the TESS payment authorization form. Do not solicit credit card information via email or text message, as neither is secure.
- Credit card numbers and other billing information should be stored in TESS.
- Do not charge a credit card unless you have specific consent for that particular purchase and amount.
- In the event that you have asked another agent to help you with a client need, share your TESS password with the agent so that he or she may view client credit card information. Do not email or text the credit card information.

Qualifying Clients

Spend time getting to know your clients' true vacation expectations before you begin the quoting process. This best practice saves you time and makes the process much more pleasant for both parties. It's helpful to talk with a client about:

- range of travel dates that are acceptable,
- number of people in the party and ages of children,
- budget range,
- client's expectations about resort, dining, and number of ticket days if applicable.

This saves a lot of time in the long-run and shortens the quoting process. It also helps to determine whether the client is serious and ready to commit to the vacation.

**For cruises and/or international travel: In your very first communication, ask the client if they have valid passports.

If they say yes, ask them to check the expiration date.
If they say no, prior to quoting, educate them on the identification guidelines and be sure they are comfortable meeting those guidelines prior to proceeding with the quote.

Identification Guidelines

Quoting

When providing a quote to a client, be sure to be very clear about what you have included and what is not included, as well as the quoted dates and number of people. Make it very explicit for example, what resort, view, ticket options and dining plan (if applicable), air, ground, insurance, etc. has been included, vs. what would is still available as an optional add-on. Also make it clear what information is needed for booking and when all payments will be due, including the timing and amount of their deposit.

Plan to follow up with clients 1-3 days after sending a quote to solicit questions or put their reservation on hold.

**For cruises and/or international travel: During the quote process, prior to booking, the client needs to complete the corresponding passport waiver of liability.
International travel waiver
Cruise waiver

If children under 18 will be traveling without one or both of their parents, it is also your responsibility to notify the client of guidelines regarding consent to travel with minors. You should refer them to this link for guidelines and a sample letter to have notarized:
Minor Consent to Travel
**This and all of the other links here are also on the Agent Quick Links page: designmytrip.net/agents

Booking

Information to collect prior to booking:
-Names of each person and ages and genders of children
-Basic hotel reservations (and Walt Disney World packages) do not require legal names; nicknames are okay
-Cruises and international travel DO require legal names just as they are listed on the client's ID that they will use for travel. Cruises allow name changes if needed.
**When booking a package with air, it's very important to match the client's name to the name on the ID that will be used, exactly. Airlines typically do not allow name changes after booking, so it is imperative to get the name right, exactly, the first time. Check and double check prior to confirming.

Planning Fees

At times, it may not be possible for you to book anything commissionable for your client, which precludes you from being paid. For example, a Walt Disney World client who wants to visit the parks during the day but does not need to book a resort, dining plan, or tickets through you (or non-commissionable tickets). You are free to charge a planning fee of your own choosing to these clients. Please bill them through your own business PayPal account. Your business PayPal must be listed as "Firstname Lastname, Independent Contractor with Travel by Design." You can list fees collected in TESS by marking "100% agent fee" under the booking and marking it as "Historical."

**Note that you, on your own, will report the collection of these fees to the IRS when you file your taxes. Planning fees collected by you will not be included in your 1099.

Reservation Confirmations

It is your responsibility to send these the same day that the booking or hold is made or changed. Being timely is extremely important! If the supplier fails to send an email confirmation, go to the supplier website and generate a copy to send.

<u>If a phone agent booked the reservation or made a change</u>: Please look over these confirmations especially carefully. If the phone agent made an error (for example dates, names, ages, tickets, resort, or especially dining plan), the client could hold you liable. Look them over yourself and also ask the client to look them over carefully.
**When calling in such reservations or changes (for example, to the Disney Reservations Center), note the name of the agent you spoke with and at what time/day.

<u>After you have placed a hold</u>: It's important to send over the initial hold confirmation to the client and ask them to check it for accuracy. They should not place the deposit unless they're sure everything is exactly what they were expecting!

<u>Before final payment</u>: Please have clients check over every detail of their reservation prior to final payment. Make resort information, dining plan and tickets (if applicable), transportation, and *especially insurance* very clear to them. This is an excellent time to up your sale by reminding clients to add ticket days, park hopping, Memory Maker, or insurance to their reservation before final payment. Do not place the final payment until you're confident everything is as your client wants it, especially their insurance election.

<u>Prior to travel</u>: Best practice is to also print a final confirmation and send a hard copy to your client prior to travel. Encourage them to carry it in their carry-on in case of any discrepancy about the reservation on resort arrival. This is especially important at Walt Disney World.

Insurance Confirmation

Please ensure that for every reservation, you can show, in time-stamped written communication, whether the client accepted or declined your offer to add travel protection. This proof might be via the TESS task (if applicable), and if not, could be an email thread where the client has clearly said yes or no to travel protection.

Cancellation

When clients have to cancel a reservation, they need to fully understand that cancellation is final and all of the financial consequences of cancelling. Before cancelling it for them, discuss any and all cancellation penalties with them. Sometimes, once they hear the penalties, they will decide not to cancel after all!