
Leisure Travel

eighth edition

*Education Systems
Travel Career Performance
Training*

About The Authors

Acknowledgements

Martha Barry, The Mark Travel Corporation
Milwaukee, Wisconsin

John Crossley, University of Utah
Salt Lake City, Utah

Gerald Fuller, Travel Advice
Ogden, Utah

Bob Relitz, Carnival Cruise Line
Salt Lake City, Utah

Cruise Lines International Association (CLIA)

Authors: Rae L. Dreith, CTC
Lisa Wade, B.S.

Editor: Rita Watts, B.A.

Managing Editor: Sharon Scott, CTC

Copyright © 2003 by Education Systems, Sandy, Utah, 800-288-3987. Printed in the United States of America.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of Education Systems. Changes are systematically made to this document. Updates, inaccuracies and typographical errors will be corrected in subsequent editions.

If you have purchased this book unbound and not shrink wrapped, it may have been illegally duplicated. It is copyrighted information and neither the author nor the publisher has received any payment for this book. Please report suspect situations to Education Systems 800 288 3987.

ISBN: 1-930102-09-7

Ms. Dreith is an instructor, course developer and author who has been involved in training and travel for over thirty years. A variety of operational, supervision, management and training positions with United Airlines, Western Airlines and Education Systems has provided Rae with opportunities that have developed her expertise in instructional technology, performance technology, instructional design and training for performance in the travel industry.

The development of TravelCampus (www.travelcampus.com), putting travel and tourism courses on the World Wide Web, is the most recent venture of Education Systems and Rae has pioneered the design and development of these courses.

Ms. Wade is an instructor and curriculum developer who has been involved in travel and training for more than fifteen years. She has a Bachelor's degree in Psychology from Brigham Young University. She has managed a proprietary travel school and teaches travel courses at both a proprietary and college level. Lisa has developed coordinated instructional materials including instructor guides, examinations and textbooks. She has contributed to several of Education Systems' student handbooks. She is currently the Curriculum Specialist for The Center for Travel Education in Sandy, Utah as well as for TravelCampus, an Internet-delivered travel education program.

Education Systems owns and operates proprietary travel schools and administers travel and tourism programs in colleges. Our industry-driven student handbook series, detailed instructor guides, coordinated transparencies and criterion-referenced examinations are utilized by additional colleges and travel organizations.

In 2001 we developed TravelCampus, an Internet-delivered travel education program that allows you to study at your convenience 24/7. See www.travelcampus.com for a course list.

Student Handbooks

Taking Off In Travel

This introduction of the basics of a travel career gives a fun, realistic presentation of employment opportunities and skills necessary for these segments of the industry: air travel, car rentals, hotel accommodations, rail travel, tours, cruises and computer reservations systems. Group travel, incentive travel, meetings and conventions and in-bound tourism are also presented. A sample RTS© disk is available to provide hands-on experience making airline, hotel and car reservations.

Travel Reservations

Travel Counseling skills, including sales and customer service are brought up to date for today's travel professional. Product knowledge of air travel, hotel accommodations, car rental and rail travel is presented in great detail. Application exercises provide practice using the major industry reference materials for all reservations procedures. Sales techniques are included with booking procedures.

Fares and Tickets (Canadian or U.S. version)

Domestic and international airfare construction and application, transportation taxes, currency, ticketing procedures and refunds and exchanges are presented in detail using ARC and IATA guidelines. Practice is an integral part of each concept, with reviews and multiple application exercises that simulate work place situations.

Leisure Travel

Current trends and tourism research in the leisure travel market take this text beyond the basics of travel reservations. The components include the leisure traveler, top leisure destinations, current cruise trends, the present and future trends in tours, including adventure tours and ecotourism. Leisure services such as groups, incentives and travel insurance are discussed.

Destination Geography - Eastern Hemisphere, Western Hemisphere

Two volumes of travel geography focus on the major tourism destinations of the world and a **work-book** provides map practice and destination studies. The text presentation is easy to use as a study text as well as an excellent reference.

Corporate Travel Management

In this one volume is everything students need to know about the field of corporate travel management. Every aspect of the industry is covered, including automation, cost cutting and professionalism.

Computer Reservations Systems

Choose Apollo®, Sabre® or WORLDSPAN®. These tutorials provide all the guidance necessary for hands-on training using any of the three major systems in the United States. The skills covered include creating PNRs, maintaining PNRs, air space, quoting fares and pricing itineraries, rental cars and hotel accommodations. The reviews and practices contribute to a high proficiency level.

Simulated Software

RTS - Reservations Training System©, presents a realistic, on-line functionality allowing the learner work place application of the basic functions of the live CRS including PNRs, faring, pricing, ticketing, car rentals and hotel accommodations. As tours and cruises become more widely used in the CRSs, the simulated program will be so enhanced.

Instructor Guides

Instructor guides are available with each student handbook. These comprehensive guides include:

- > **lesson plans**
- > **transparency masters**
- > **examinations**

Lesson plans include materials checklists, advance preparation, recommended agendas and times, learning activities and active lecture suggestions.

Objectives

The overall objective of Education Systems' TRAVEL CAREER PERFORMANCE TRAINING is to furnish the prospective travel professional with:

- › **Sales and Customer Service Skills**
- › **Product Knowledge**
- › **Computer Proficiency**
- › **Destination Awareness**

This knowledge and these skills are required to succeed as a travel professional whether with the airlines, cruise lines, hotels, car rental companies, travel agencies, tour agencies, as well as the newer entrepreneurial activities utilizing such technologies as the Internet and GDS/CRS home/business versions.

The objective of this particular text, *LEISURE TRAVEL*, is to provide you with current information and trends within the leisure market, including:

- › **identifying the leisure traveler**
- › **identifying current hot destinations**
- › **tours and vacation packages**
- › **cruises**
- › **exploring new and tested leisure products**

For more basic product information on Air Travel, Car Rentals, Accommodations and Rail Travel, see the Education Systems text entitled *Travel Reservations*.

Preface

According to the Travel Industry Association of America, Travel and Tourism:

- Has compounded job growth of 56.3% during the 1990's and is outperforming total U.S. employment growth
- Represents 6% of U.S. gross domestic product
- Is the third-largest retail industry in the U.S.
- Is the second-largest employer in the U.S.
- Has faster growth in hourly earnings during the past 10 years than any other industry except for finance, insurance and real estate
- Leisure travel accounts for approximately 37% of the total travel market

This text brings you current on products and services of the leisure industry. We have utilized current research, published studies and up-to-date information from multiple trade publications.

Leisure travel is defined as travel for pleasure, outdoor recreation and entertainments as well as visiting friends and relatives. You will study who uses leisure travel, why they travel, how they travel, where they travel, how they get there and what they do when they arrive. Product and services include groups, charters, tours and cruises.

For Training Purposes Only

The advertisements, rates, taxes, displays, etc., presented in this student handbook are for training purposes only. You must always use current information in the work place.

Contents

Chapter 1 - Leisure Travel Sales

Leisure Travel Sales	2
Sales and Service	3
Sales Attitude Assessment.	4
Sales Attitude Assessment Answer Key	5
Telephone Manners	6
Listening Skills	7
Effective Listening Quiz	9
Sales Process: Step 1 - Initial Meeting	10
Sales Process: Step 2 - Getting to Know You	11
Sales Process: Step 3 - Making a Recommendation	12
Sales Process: Step 4 - Making the Sale	13
Make the Reservation.	14
Follow Up After the Sale	15
Key Concepts.	16
Study	17
Application	18

Chapter 2 - Leisure Travelers

Leisure Travelers	20
Travel Personality Types	21
Why People Travel	25
Demographic Groups	27
Preferred Transportation	28
Travel Planning and Booking Trends	29
Targeting The Traveler	31
Key Concepts.	32
Study	34
Application	35

Chapter 3 - Leisure Destinations

Leisure Destinations	38
Why Go There?	39
Vacation Activities	40
Favorite Destinations	41
Top Destinations	43
Matching The Client To The Destination	44
Destination Cycles	45
Key Concepts.	47
Study	48
Application	50

Contents

Chapter 4 - The Cruise Market

The Cruise Market	52
The Cruise Vacation	53
Benefits of Cruising	57
Types of Cruises	58
Popular Cruise Destinations	61
Cruise Lines	66
Study	72
Cruise Print References/Resources	74
Cruise Brochures	83
Sell the Cruise	96
Key Concepts	99
Study	100
Application	102

Chapter 5 - Vacation Packages and Tours

Vacation Packages and Tours	112
Vacation Package/Tour Benefits	113
Vacation Package/Tour Brochures	114
Other Tour References and Resources	115
Vacation Package/Tour Components	116
Vacation Package/Tour Pricing	117
Vacation Package/Tour Development	119
Tour Associations and Regulators	120
Vacation Package/Types Of Tours	121
Sample Escorted Tour	123
Sample Hosted Tour	127
Sample Independent Tours	129
Sample Fly/Drive	131
Niche Tours	132
Sample Niche Tours	133
Study	137
Vacation Package/Tour Destinations	139
Vacation Package/Tour Sales	140
Brochures as Sales Tools	142
After the Reservation	153
Key Concepts	154
Study	156
Application	158

Contents

Chapter 6 - More Leisure Products and Services

Leisure Products and Services	160
Diversity of the Group Market	161
Group Travel Possibilities	162
Corporate Group Travel	165
Group Charters	167
Ecotourism	168
Adventure Travel	170
Adventure Travel and Ecotourism Trends	172
In-Bound Tourism	173
Travel Insurance	174
Key Concepts	177
Study	178
Application	179

APPENDIX	A-1
ARC Documents - MCO	A-2
ARC Documents - Tour Order	A-4

GLOSSARY	G-1
---------------------------	-----

Notes:

Chapter 1

Leisure Travel Sales

Leisure Travel Sales



What is the business of a travel counselor? You may answer, “Selling travel.” Others may say, “Providing service to clients in meeting travel needs.” Do you go to work to sell travel or to service clients? Which is correct? In truth, both are. Until you sell something, you have no client to service. But if you do not provide service to meet your client’s needs, you may not sell anything. Even if you do get a sale, without good customer service, the client will not return and repeat business is of great importance to travel companies. A travel counselor can both sell and service clients.

The travel and tourism industry is becoming highly competitive. Clients can go to multiple sources for travel information and booking capabilities. Clients can call an airline, tour company, car rental company or hotel to obtain information or make a reservation. These same clients can call or visit nearly any agency in town to get the same information or reservation. The travel professional that is skilled at determining the client’s needs and meeting them by making a sale is the one who will get the client’s business.

Now, to complicate the process even more, the Internet has put travel information and the ability to make reservations right into the homes of potential clients. ComScore Networks, a tracking company, put online travel spending at a record \$557.5 million for the week of January 13, 2002. Consumers spent \$19.4 billion in 2001 on U.S. travel sites, which accounted for 36% of all of spending by online consumers. But for the general population, most travelers still prefer to get their travel information and reservations from agents, and consider service to be the most important thing about agents. Thus, your ability to both sell and service your client effectively is becoming increasingly important.

OBJECTIVES - Upon completion of this chapter you should be able to:

- Understand the need for and importance of sales and customer service skills in the workplace
- Ascertain your personal sales attitude
- Name and explain the four phases of the sales process
- List different and similar interpersonal skills used in telephone and face-to-face customer contacts
- Demonstrate ability to communicate politely by telephone
- List and utilize tips for improving listening skills
- Define open and closed questions and specify the need for each
- Recognize and define “choice close” and “assumptive close”
- List effective follow-up methods and explain the importance of follow up

Sales and Service

A very important reason for you to acquire sales and customer service skills is that your sales will pay your salary. Suppose you sold a client a cruise package for \$10,000. Of that \$10,000, \$9,000 goes to the cruise line (based on a standard 10% commission paid by cruise lines). The remaining \$1,000 must be divided to cover salaries, taxes, benefits, rent, utilities, liability insurance, telephone, postage, computer costs, delivery charges, subscriptions, advertising, licensing and support staff. You should sell approximately \$65,000 to \$85,000 in travel each month to pay yourself a starting salary of \$1200 to \$1800 per month. The more you can sell, the more you can earn!

Economics 101

The Canadian Tourism Commission recently surveyed travel agencies in Canada. They found that agencies spent approximately 58% of income on wages, salaries and benefits. Rent and company vehicles took 9%, advertising took 5% and that same amount was spent on telecommunications and postage. Fees, taxes and licensing took an additional 5% and office supplies took 3%. Miscellaneous expenses took the remaining 15%. These figures are very similar to what is spent in the U.S.

Where does the money go?

- 58% Wages and benefits
- 9% Rent and company care
- 5% Advertising
- 5% Phones and mail
- 5% Fees, taxes and licensing
- 3% Office supplies
- 15% Miscellaneous

To illustrate, assume you have 100 pennies. These pennies represent payment on a vacation package that pays an 8% commission.

100 cents	8% commission on a vacation package
- 92 cents	to the vendor - cost of sale
- 4 cents	salaries, taxes and benefits
- 1 cent	rent
- 1 cent	communications
- 1 cent	operation expenses
- 1 cent	marketing and miscellaneous costs
= 0 cents	means no profit

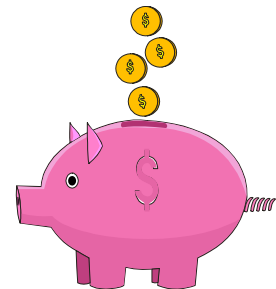
Consider, on the other hand, you sold a vacation package from a preferred supplier that pays a 12% commission.

100 cents	12% commission on a vacation package.
- 88 cents	to vendor - cost of sale
- 6 cents	salaries, taxes and benefits
- 1 cent	rent
- 1 cent	communication
- 1 cent	operation expenses
- 1 cent	marketing and miscellaneous costs
= 2 cents	profit

This leaves a profit of 2 cents, or 2 percent, for the agency as well as a pay raise for you - note the 6 cents (%) for salaries rather than 4 cents (%).

While this scenario is not scientific, it does give you an idea of how much it costs to employ you and how much effort you need to expend to pay for yourself.

Sales and customer service are such important skills. Service involves counseling your client regarding the many elements involved in their travel plans and follow-up after the trip. These principles apply to each travel product in this text. We will present some basic sales and customer service skills in this chapter and allow you to practice these skills with the leisure products presented in the rest of the text.



Sales Attitude Assessment

What is your attitude towards sales? Complete the following assessment and find out. After you are finished, check your answers against the answer key on the following page.

1. When you hear the word "salesperson," is your first response negative, positive or indifferent? Describe what you think of.

2. Think of your most recent experience with a salesperson where you were the client.
 - A. Did you purchase what they were selling?
 - B. Why or why not?

3. Read the following statements and determine if you Agree or Disagree.

A. Most sales people are manipulative.	A	D
B. Sales means giving people what they want.	A	D
C. People are born to sales.	A	D
D. We use sales in many different areas of our lives.	A	D
E. Sales skills can be developed with time and practice.	A	D
F. Sales means giving a person what they need.	A	D
G. Travel agents don't have to sell; they just book requests.	A	D
H. I don't consider myself a salesperson.	A	D
I. Good salespeople are important to many organizations.	A	D

Sales Attitude Assessment Answer Key

1. While every answer will vary, keep your description in mind as it is telling of your attitude towards sales and salespeople.
2.
 - A. Either yes or no.
 - B. If you answered yes to 2A, the product must have satisfied your needs. If you answered no to 2A, think about the reason. Could the salesperson have handled the situation differently to change your mind?
3.
 - A. Agree and Disagree. Manipulation can be bad and unproductive, i.e. a child throwing a tantrum. Good salespeople, however, may manipulate clients somewhat, leading them towards preferred products or destinations, but the clients are satisfied with the end result, making it a win-win situation for both parties.
 - B. Disagree. What your client says they want may not really fit their needs. For example, I WANT a Porsche. With a family of six, I NEED a mini-van.
 - C. Disagree. People may seem more outgoing or able to sell but sales skills can be learned through practice, and by being "sold" on the sales techniques.
 - D. Agree. Even small children learn to "sell" their parents on a later bedtime. You sell your spouse on the need for a new t.v. or your friend sells you on which movie to go see.
 - E. Agree. See 3C.
 - F. Agree. See 3B.
 - G. Disagree. See 3B.
 - H. If you agree, you may need to rethink your role as a travel agent. After reading this chapter, come back to this question. You may have a different perspective about travel sales. Remember, unsolicited sales calls, i.e. telemarketers, are offering a product or opportunity you may or may not want/need. Generally with travel sales, the client has come to you with a want or need.
 - I. Agree. There is a saying that nothing happens in the economy until someone sells someone else something. Salespeople keep the economy, and many companies, going.

After going through this Sales Attitude Assessment, does your attitude need an adjustment? If yes, this text may help you jump start your sales skills. If no, then GREAT! This text will add to your positive sales attitude and increase your sales skills and knowledge.

Telephone Manners

Telephone communication is becoming more and more frequent within the travel and tourism industry. You may rarely see your clients in person and may transact much of your business via the phone. Even if you have a large walk-in clientele, you will still utilize the phone to contact suppliers and follow up with clients.

Telephone communication is often the first contact a client has with a travel or tourism supplier. Good telephone manners are essential and will enhance your effectiveness and your success. You will explore telephone manners and good communication before you examine travel sales.

Answer

Answer on the first ring, if possible. (Certainly, no more than three rings.) Be ready to talk when you pick up the phone. Focus your attention on the caller. Transfer calls without delay.

Greeting

Identify your company and yourself. If you must put a call on hold, ask for permission and wait for a response before doing so. When returning to a held call, thank the client for waiting.



Voice

Develop a telephone voice that sounds confident, cordial, alert and attentive. You are a professional; sound like one. Be sure you:

- Sound happy. Be friendly and courteous. Smile through the phone.
- Speak at a normal pace. Too fast or too slow does not result in good communication. Practice varying your speed for effect as you do the Challenge!
- Position the mouthpiece approximately one-half inch from your mouth and speak directly into it. Speak with a strong, firm voice at normal volume.
- Show expression by the rise and fall of your voice. This reflects an interest in the caller and her needs.

Speech

Enunciate. Slurring is annoying. Speak clearly and distinctly using correct English and proper grammar. If you are uncertain of your spoken English skills, consider a course at a local college to correct this. You handicap yourself unnecessarily if you do not sound well-educated and professional.

Jargon

Industry jargon communicates only to those who are in the industry. You will not sound professional using all of the codes, words and phrases peculiar to this industry with your clients; you will sound rude. Furthermore, you will not communicate effectively as your client may or may not correctly understand the terms you are using.

The way you handle yourself on the phone will give your client his “first impression” of your organization. Making a favorable impression and establishing personal rapport with your prospect are vital foundations for your sales call.

CHALLENGE!

Practice each of the items above in telephone conversations with friends and associates.

Develop your own phrases to reflect your own style.

Get feedback from them as to how professional and courteous you sound, considering your tone of voice, speed and volume.

Listening Skills

True listening is an active process and is your primary means of gathering information, especially by phone. Two myths about listening may keep you from being your most effective in any kind of communication. These myths are: **hearing and listening are the same thing** and **listening skills are something you are born with** and need not be learned or practiced.

Hearing

Hearing is the physical action of gathering sound waves and is a sense you are born with (or without, as the case may be).

Listening

Listening involves hearing, recognizing the message and selecting an appropriate response.

Obstacles to Listening

There are many obstacles to effective listening. Some are personal and some are environmental. Some personal obstacles include:

Personal opinions and beliefs - Your preconceived ideas may keep you from listening objectively. You may assume you know where the client is heading but each situation is different.

Mental state - You may be angry, depressed, or worried and preoccupied which can impact listening effectively and prevent you from giving full attention to the client.

Physical condition - You may not feel well or lack energy and don't feel up to listening. You may also have suffered some hearing loss, making it difficult to hear the message.

Thought speed - While your brain can comprehend up to 600 words per minute (wpm), most people speak at a rate of 125-150 wpm. This difference in rates is known as "lag time" and while the brain is idle, it may begin to wander or daydream.

Some environmental obstacles include:

Office distractions - Other people talking, telephones ringing, and office equipment noises can all distract you from listening.

Speakerphones - While these are nice to use to continue a conversation when searching for something the client has requested, it can also be tempting to work on other things that have nothing to do with this client, thus taking your attention from the client.

Physical obstacles - Desks, counters or tables put a nonverbal barrier between you and your client. Remove them, if possible.

Be an Effective Listener

To become a more effective listener, try the following tips.

Stop talking! To help you keep your comments to a minimum, for every statement you make, ask two or three questions. Wait for a response. If the client does not respond after a minute, paraphrase the question and wait for the response. Do not answer for the client or move on to another question.

Be prepared to listen. Remove as many obstacles from yourself and your environment as you can so that you are ready to listen. If a client phones or walks in and you are finishing up another reservation, ask the client to wait a moment while you finish up so that you can give her your undivided attention. Never keep a client waiting too long, however, especially on the phone.

Listen to understand. Watch for nonverbal messages and listen to the words and the emotions behind them. Get a complete message. The words may say “yes” but the body language may be saying “no.” Verify what you are seeing and hearing by asking a question or paraphrasing her response.

Listen openly and without emotion One obstacle to listening is your own opinions and beliefs. Listen from the other person’s point of view. Try to put yourself in her shoes. You don’t have to like all of your clients but you do need to respect them. Maintain your professionalism and try to listen without judging or letting emotion get in the way.

Take notes and ask questions while you listen and listen for information you will need to make a reservation. Note information that can help make this vacation (or a future one) special—an anniversary date, a love of golf, a passion for history. Clarify your understanding by asking questions.

Nonverbal Communication

As stated previously, effective listening means listening to the whole message your client is sending with words, tone, gestures, posture, etc. Make note of the following nonverbal cues.

Voice tone - Is the client asking questions (tone rises at the end of the sentence) or making statements (tone goes down at the end of the sentence)? Is the client animated or monotone? Read the following out loud as a question and then as a statement. Note the difference in meaning and how you might respond. “I guess Jamaica is o.k.”

Gestures - Open, flowing gestures may indicate involvement and excitement

Head Movement - Nodding not only means “yes” in our culture, but also indicates that you are listening to the speaker.

Posture - An open posture generally indicates an openness to suggestion while a closed posture (crossed arms and/or legs) may mean an unwillingness to listen. Leaning forward shows interest while leaning back may indicate coolness.

Eye Contact - Lack of eye contact may indicate a lack of trust or confidence. Making and keeping eye contact may show openness, interest or confidence. Be careful, however, not to have a staring contest with your client. It is acceptable to make eye contact, look away, make eye contact, etc. during a transaction, making eye contact 65-75 percent of the time.



Effective Listening Quiz

How well do you really listen? To see if you are an effective listener, ask yourself the following questions and answer Yes, No or Sometimes.

1. Do you take notes as you listen?
2. Do you listen objectively, without judgment?
3. Do you focus all of your attention on the speaker?
4. Do you wait until the speaker is finished before planning your next remarks?
5. Do you make eye contact or look at the speaker?
6. Do you approach conversations with a sincere desire to listen?
7. Do you avoid jumping into a conversation and never assume you know what someone will say?
8. Do you avoid daydreaming and focus only on the speaker?
9. Do you keep your emotions in control while listening?
10. Do you reflect back, in your own words, what you heard the speaker say to clarify your understanding?
11. Do you observe the speaker's posture and gestures while he speaks?
12. Do you strive to keep your work area distraction-free during conversations?
13. Do you consciously look for clues to needs or items to take action on during conversations?
14. Do you check for understanding of a speaker's meaning by asking for clarification of words or comments you do not understand?
15. Do you put yourself in the speaker's place and empathize with what the speaker is saying?

If you answered "Yes" to every question, you are an effective listener. Skip this chapter and move to the head of the class! If you answered "Sometimes" or "No" to any of the questions, you have some areas to work on to be an effective listener. Keep practicing and you'll soon be a pro!

Sales Process Step 1 - Initial Meeting

The Initial Meeting is the **first step** in the sales process. It includes **greeting** the client, **making introductions** and **listening**. The Initial Meeting will vary slightly in person or over the phone and since you may do business either/both ways, we will discuss them both separately.



Face-to-Face Greeting/ Introduction

When a client comes into your office or is shown to your desk, common courtesy requires that you offer acknowledgment of the client's presence. If you are busy or on the phone, make eye contact with the client and signal (or say) that you will be with her in a minute.

As soon as you are able, stand, introduce yourself and offer your hand. Ask the client for his name and invite him to sit down. Write down the name, spelled correctly, along with the client's address and phone number. Ask him what you may do for him. Throughout the sales process, make eye contact frequently with your client to let him know he has your attention.

Over-the-Phone Greeting/ Introduction

When answering the phone, be friendly and courteous. Be prepared to give the caller your full attention. Your greeting should include the name of your company and your name. An offer to help is always acceptable.

The client will generally respond to your greeting by telling you why he is calling. Acknowledge what he is saying, but do not answer any questions without first obtaining the client's name, address and phone number and get permission to call at home or work.

A travel counselor that has a client excited about booking a vacation and then has to ask for a name slows down the sales process. The enthusiasm for the trip gets lost in the mundane of giving basic information. When the client is enthusiastic and ready to book, you should be ready to make the reservation immediately. Make it a point to always get a name during the Initial Meeting.

Agent
Thank you for calling Paradise Travel,
this is Lisa. How may I help you?

Client
I want to plan a trip to Disneyland.

Agent
Disneyland sounds fun,
and I can help you with the planning.
First, could I get your name, please?

Listening

Once you have selected the appropriate greeting, it is time to listen using the tips listed previously. Listen for the information you need as the travel professional to begin your research. Make notes. Do not make it necessary for the client to repeat information given previously! You can lose the client's trust in your competency if he must give you important details over and over.

An appropriate greeting, making introductions and listening will establish a professional tone that will give your client confidence in your knowledge and ability to handle his travel plans. You will continue to establish good client relationships as you move to the next phase in the process, Getting to Know You.

Sales Process

Step 2 - Getting to Know You

The **second step** in the sales process we call Getting to Know You. This is the phase where the client does most of the talking with the travel professional leading the way **by asking questions**. In the Initial Meeting phase, you should have obtained the client's name, address and phone number. Before you can begin to make a reservation, however, you need more information than that. To obtain that information you will ask questions. There are two types of questions, closed and open. **Closed** questions require specific answers of fact. **Open** questions are designed to encourage the client to open up and share feelings, concerns, preferences and opinions.

Closed Questions

Some of the closed questions you need answered are:

- **Who** is traveling?
Include names, addresses, phone numbers and ages of children, if applicable. Remember to make notes whether to place the call to home or work.
- **What** is the travel product?
Air travel, car rental, hotel/etc.
What class/kind? (how much?)
- **Where** is the client going?
Where, exactly. If air travel, which airport?
Note: The client may or may not have a specific answer to this question. Open questions will then help you determine the destination.
- **When** is the client planning to leave? Return? How flexible are your plans?
Dates are required to check for availability and the cost.

Often answers to most of these questions are given to you when the client tells you why he called or came to your office.



Open Questions

Open questions will assist you in determining the client's likes, dislikes and needs for this particular trip. The questions you will ask may vary with each client and situation as you work to clarify his needs. Remember, ask a question and then wait for the response. Some examples of open questions are:

- What is the purpose of this trip? Business, pleasure or celebrating a special event?
- Where did you go on your last vacation?
What did you like/dislike about it?
- What hotels have you stayed at in the past?
Note: The answer to this type of question will also give clues as to traveling style or budget.
- What kinds of activities do you enjoy?

Clarify as needed to be certain you understand what the client is saying. When you think you have enough information to begin recommending, **paraphrase what the client has said** to be certain you both agree on his needs.

Let me see if I understand what you want.
You want to take your family to Disneyland.
There are four in the party,
two adults and two children, ages 7 and 9.
Your children have never been there before.
Your last family vacation was skiing at
Aspen, Colorado.
You prefer nice accommodations
and need a rental car.
Is that right?

Decision Maker

Who will be making the decision? Whenever possible, speak to all parties involved in making this decision. Not only will it ensure that the needs of all of the travelers are met, but speaking to all parties involved at the same time also avoids the biggest objection you might otherwise get.

Thanks for your time, I will call you back
after I talk it over with (whomever).

Note: The client generally does not call or come back!

When you and the client are in agreement, it is time to move on to the next step, Making a Recommendation.

Sales Process

Step 3 - Making a Recommendation

Once you have the answers to the closed and open questions you asked, and you and your client have agreed on his needs, you are prepared for the **third step**. Do your research and **make a recommendation to the client**. Since you took notes on what the client said his needs are, it is a simple process to make your recommendation of value to the client. This is done by using a technique known as turning features into benefits.

Features

Every product or service possesses features, specific aspects of the product or service that is always with it—it is an inherent characteristic. For instance, the features of a tour package to Disneyland might include:

- Car rental
- Choice of hotel
- Early admission to the theme park
- Full breakfast daily at hotel

Features become benefits as you personalize them to meet the needs of your client at that particular time. The ability to translate features into benefits is extremely important in travel sales.

Benefits

A benefit is the value the client seeks to derive from a feature. Of course, features provide different benefits to different people, and sometimes a feature may offer no benefit to a specific client.

Salespeople use several techniques to emphasize benefits. One technique is to incorporate your client's earlier statements into the recommendation.

You mentioned your children have never been to Disneyland. This package offers early admission into the theme park so your kids can get a head start on the crowds.

-or-

You said you would like a rental car. A rental car is included with the hotel and has unlimited miles.

This technique also has the advantage of showing your client that you are listening and considering his needs.

Another technique to assist yourself in thinking of benefit statements about the features of the travel is to ask yourself “so what?” Answering this question on behalf of your client allows you to relate with the client, state the benefits of the feature (using the client's own words), and show the client that the features of the itinerary you have planned are meeting his travel needs and preferences. For example:

This package includes full breakfast daily at the hotel...**(so what?)** so you don't have to worry about the hassle and cost of finding someplace to eat breakfast.

Study these sample features with suggested benefit statements.

FEATURE	BENEFIT
NON-STOP FLIGHTS	This provides you with the fastest possible service and minimizes any baggage handling problems.
PREPAID	You will know in advance what your trip will cost and will not have to carry a lot of extra cash.
UNLIMITED MILEAGE	You will be able to see all of the sights you want without worrying about additional costs of the car rental.
ACCOMMODATIONS ON TRAIN	You can rest comfortably while traveling to your next destination and be ready to see it when you get there.
OCEANVIEW ROOM	See the ocean from your room any time.
CRUISE SHIP AS HOTEL	You only unpack once and still visit three different islands.

Sales Process Step 4 - Making the Sale

The **final and fourth step** of Making the Sale not only meets the needs of your client but keeps the travel company(s) in business and pays your salary. (Refer to page 3.) You attempt to close the sale as soon as you have sufficient information to make a recommendation. There are techniques, procedures, even specific phrases that can be used to close a sale effectively. By offering to book, you are allowing your client to do what they want to do. The closing can be done by offering a choice of two options—**Choice Close** or by assuming the client wants what you have proposed—**Assumptive Close**.

Choice Close

Presenting the client with a choice is called a choice close:

This tour offers a choice of hotels.
Which would you prefer,
the Disneyland Hotel or the Paradise Pier?

-or-

What size of car would you like, mid-size or full-size?

Once you have found the product(s) that best meet the client's needs, you can recommend, using benefit statements and ask the client which they prefer.

Assumptive Close

In the process of the conversation, you may have determined one product is the only one to meet the needs of your client. Then assume the client wants to make the reservation. Do not phrase your closing with questions that can be answered with a "yes" or "no."

I will make the reservation for you for the 5-night package including a rental car.

Another way to make an assumptive close is to ask for information that gives consent. For example:

I will make the reservation.
Will this be check or credit card?

If your client gives you a credit card number or writes out a check, he is making the reservation.

Avoiding Objections

Sometimes clients express objections to closing the sale. Why do clients resist buying?

- May feel pressured
- May want to check with someone else before booking
- May not have enough information
- May feel guilt about spending the money (price shock)

The best way to counter objections is to avoid them in the first place. Most objections arise because you have not fully questioned while getting to know your client.



A complete interview with all parties making the decision will not only provide you with enough information to make the right recommendations and the clients with enough information to make a decision to buy—but you will have also established a rapport and a level of trust that will help avoid objections.

CHALLENGE!

Call an agency or an airline or a hotel and ask for information on a tour package or a flight or a hotel room.

Write down which, if any, of the sales steps were followed.

What was done well?

What could be improved on?

Did you want to buy?

Make the Reservation

You have completed the sale and now need to make the reservation. As you continue with your study of leisure travel products, you will learn the booking procedures to make reservations for a variety of products. Study this Sales Job Aid provided below. It is a summary of the four basic phases of travel sales:

Return to this chapter as you study the chapters that follow and adapt and apply the sales steps to each travel product. By doing so, you will be on your way to becoming a professional travel counselor.

- **Initial Meeting**
- **Getting to Know You**
- **Making a Recommendation**
- **Making the Sale**

SALES Job Aid		
Four Steps		
Initial Meeting	Greet the Client(s) Make Introductions Get Name, Address, Phone Listen	Be prompt, friendly, courteous, professional. Introduce yourself (sometimes your company). Listen for facts, make notes. Listen for feelings, respond.
Getting to Know You	Closed Questions: Who - Name, Address, Phone and Ages What - Airline Flight? Hotel? Car Rental? Where - Destination When - Leave and Return, Flexibility	You need the answers to these questions to check availability and price of the travel product.
	Open Questions: Why This Vacation Past Vacations What Hotels Enjoyable Activities, Interests Decision Maker	Answers to appropriate open questions allow you to pursue the sales process, keeping the customer in mind and providing valuable customer service.
Making a Recommendation	Features Benefits - Use The Client's Words	Learn the facts of the travel product. Use the facts of the product and knowledge of the client to turn the features to benefits and make the recommendations.
Making the Sale	Closing: Choice Assumptive Avoid Objections Make The Reservation	The Recommendation can become the Assumptive Close. Depending on the client, two choices might be better.

Follow Up After the Sale

You have sold your client a vacation. You have advised him regarding insurance options, flight schedules, itinerary and additional travel products. He has left on his trip. Now is your job as a professional travel counselor complete? NO!

Follow up shows you are a caring professional. If you assume that every sale is a potential for another sale, then follow up makes sense. The toughest part of sales is to get that initial first sale. The easiest is to get the second.

Here are a few follow up techniques successful travel professionals have used.

Call

Call the client upon return to find out how the trip went. Every client will appreciate that you thought of them. Get feedback. Ask for three things she liked and three things that could have been improved. If there were any problems, use the problem-solving techniques covered next to resolve them, if possible.

Send a Letter

Some agents send a "Welcome Home" letter that thanks the client for his business and shows an interest in the trip. You may also include a discount coupon for the next trip to encourage repeat business, or ask him to bring in a photo of the trip to hang on a photo wall in the office for a discount on the next trip. This gets them back to the office and provides incentive to book again.

Keep a Tickler File

Keep a file of your clients and include record of vacations, interests, dislikes, hobbies, favorite hotel, etc. Go through it frequently and send a note or make a call when you see a trip that might interest them.

Problem-Solve

A national consumer survey by the Technical Assistance Research Program found the following about the number of unhappy customers who will buy from you again:

- 9% of noncomplainers
- 19% of complainers whose complaints were not resolved
- 54% of complainers whose complaints were resolved
- 82% of complainers whose complaints were resolved quickly

Getting feedback from your clients, even negative feedback, is helpful if you can do something about it and do it quickly. Good problem-solving techniques include the following steps:

- **Listen** - Allow the customer to explain the problem to you.
- **Apologize** - In these days of litigation, be careful about accepting responsibility for the problem, but you can be sorry that the client experienced a problem. A simple, "I'm so sorry you were inconvenienced. Now, how may I assist you?" is enough.
- **Take Responsibility for Finding a Solution** - Take responsibility for solving the problem, even if you didn't cause it. Don't ask the client to call someone else; you do it. Remember, the client doesn't want to hear excuses about this employee or that supplier. Work to find a solution and get feedback from the client as to what an acceptable solution might be.
- **Put the Solution Into Action** - Do what you said you would do to solve the problem.
- **Thank the Customer and Follow Up** - Thank the customer for bringing the problem to your attention so that you can keep it from happening in the future. Follow up afterwards to be certain the customer was indeed satisfied.

Customer service research shows it costs about six times as much to attract a new customer as it does to keep an existing one. Costs to attract a new customer are incurred through promotion and advertising at about \$118 per year. Costs of keep a customer include offering refunds or discounts at about \$19 per year. It does pay to follow up with your clients and problem-solve to keep them happy and coming back.

Key Concepts

Sales and customer service are important skills for any travel professional, especially with competition from other travel corporations and the ability to obtain travel information and book from home via the Internet or other on-line products.

Telephone communication is often the first contact a client has with a travel or tourism supplier. **Good telephone manners are essential.** These include: answering promptly, using a proper greeting, developing a telephone voice, speaking clearly and properly and keeping jargon out of the conversation.

Good listening skills are necessary for a successful travel professional to effectively sell and offer customer service. **Listening is a skill that can be developed.**

There are four steps in the sales process: the **Initial Meeting, Getting to Know You, Making a Recommendation and Making the Sale.** Using closed and open questions, agreeing on needs, turning features into benefits and offering a choice or assumptive close are all parts of the process.

*Your job is not finished when the client leaves on his trip. Every sale is a potential for another sale, so you will **follow up** by writing or phoning your client upon return.*

KEY TERMS

Assumptive Close
Benefits
Choice Close
Closed Questions
Customer Service
Features
Follow Up
Greeting
Hearing
Jargon
Listening
Open Questions
Sales

Study

- 1. List the four steps in the sales process.
 - a. _____
 - b. _____
 - c. _____
 - d. _____
- 2. List six tips for improving listening skills.
 - a. _____
 - b. _____
 - c. _____
 - d. _____
 - e. _____
 - f. _____
- 3. Describe a good telephone voice.

- 4. How many times should you let your phone ring? _____
- 5. Write a good phone greeting.

- 6. Write a good greeting for a client who just walked in. Include what you would say and do.
Say _____

Do _____

- 7. List four follow up techniques:
 - a. _____
 - b. _____
 - c. _____
 - d. _____
- 8. Explain the importance of follow up.

- 9. Why are sales and customer service skills important today for travel professionals?

Application

1. Mary Higginson is on the phone. She wants you to help her with some travel plans. Write four open questions you will ask Ms. Higginson as you “get to know her.”

- a. _____
- b. _____
- c. _____
- d. _____

2. From what Ms. Higginson has told you, she is planning a surprise wedding anniversary trip for herself and her husband in August. She wants something luxurious with lots of activities and sightseeing. You feel a cruise to Alaska will meet her needs — lots of pampering, plenty of activities both onboard ship and on shore, and many varied, interesting sights to see. Make a recommendation to Ms. Higginson using features and benefits.

Recommendation _____

Feature _____

Benefit _____

Feature _____

Benefit _____

Feature _____

Benefit _____

3. Make the sale to Ms. Higginson with:

a. Choice close _____

b. Assumptive close _____

4. Tomas Sergi is wanting you to check airline schedules for him. List four closed questions that must be answered before you can begin the process of itinerary planning.

a. _____

b. _____

c. _____

d. _____

5. Steven Kingman is calling you for information on a trip. You have gone through all the phases and are ready to make the sale. He wants to talk with his spouse first. What could you have done to avoid this objection?
