



# Best Practices

## For Travel Agencies Using ClientBase Plus



### **Best Practice #1: Query up your top 200 clients, print and send them each a Client Survey.**

- Use the Level 2 Query, set the Profile Type to *Leisure*, click the Travel History tab and enter 200 in the "Top X Sales Total" field.
- Or, if you don't have TRAMS Back Office, add a Marketing Code to your Marketing Tables called "Send Client Survey" and ask your agents to retrieve their top clients and check this box. Then use the Level 2 Query, click the Marketing tab and check the "Send Client Survey" code.
- From your Query Results, click on **Report | Profile | Client Survey** and print a survey for your results. Hint: You can go to **Global Defaults | Header and Footer | Reports** to create your letterhead information so it prints automatically on each survey.
- With the same query results in your Profile Manager, click on *Merge to Letter*. Create a cover letter to include with the survey requesting your customers take the time to complete and return the survey. Include some type of incentive to return the survey. For example, include a pre-addressed envelope with proper postage; or, offer them a "chance" to win a drawing for a free weekend at a nice hotel, dinner for 2, etc. Most of our students that do this, say they get between 75% - 80% back.



### **Best Practice #2: 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 Practice #3: Use your Travel History to populate Marketing Codes.  
(For TRAMS Back Office agencies.)**

- Use Level 2 Query and the Travel History tab to query travelers based on past purchases by Travel Category and Vendor. For example, query all clients that have purchased a cruise with you in the past to code them as a cruiser. Or query all clients that have bookings with high-end vendors or have spent over X dollars on a single invoice to code their Budget.
- With the desired results in your Profile Manager, click **Utilities | Global Modify** and then the Marketing Fields tab to stamp the desired codes into your results.
- Run the Marketing Code Statistics report for all Leisure clients to get a bird's-eye view of your client preferences to date (query all Leisure Profiles, click **Reports | Profile Reports | Statistics | Marketing Code Statistics**).



**Best Practice #4: Actively track how many "new" customers contacted your agency and officially welcome them as a new customer. The best compliment you can give your customer is to tell them you want their business.**

- Add a Marketing Category called *Client Status* if one does not already exist. Add "New Customer" to the marketing codes for this category.
- Next, customize the "Welcome to the Agency" letter by going to **Global Defaults | Document Templates** and loading the default template for editing.
- Train your agents to always build a profile for new customers and to check this code.
- Use the Level 2 Query and in the *Create Date From* enter =Mon and in the *Create Date To* enter =Fri, then in the Marketing Tab check the box for Client Status of New Customer.
- From the results screen, click on **File | Save Query As** and name the Folder "This week's new customers".
- Every Friday click the folder called "This week's new customers" and click **Merge to Letter**. Select the Welcome to the Agency document template. Don't forget to create a mailer. Print and mail it along with a Client Survey to your new customers.



**Best Practice #5: Take the time to find out how new customers heard about your agency. Run reports to see where advertising dollars are best spent.**

- Customize the User Defined Drop Down List for the *Referred By* field located in the General Info folder of a client profile. While there, add "Current Profile" to the list of choices.
- Use the Level 3 Query and set the *Profile Type* to Leisure or Commercial, and the *Referred By* field to "Is Blank". Click OK to query your results
- Go to Utilities and Global Modify. Set the *Field to Modify* to *Profile.Referred By* and the *Set Value* to "Current Profile". (This way we can set the Referred by as a Required

Field but won't force an entry when editing existing profiles because it will already exist.)

- 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.
- Use the Level 2 Query and set the *Profile Create Date From* to =-30,0,0 and set the *Profile Create Date To* to =. Next, click the Marketing Tab and set the Client Status to "New Client" (as instructed in Best Practice #4). Click *OK* to run the Query.
- From the Query Results click **File | Save Query As** and name the Query "This month's new customers".
- Every month click the folder called "This month's new customers" and from the results go to **Reports | Profile Reports | Statistics | Referred By Statistics** to see what advertising dollars are proving worthwhile.



### **Best Practice #6: Send a *Referral Thank You* letter to a customer who referred a new client to you.**

- If you take part in Best Practice #5, 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.
- Start by adding, "Referred a Client" to the User Defined Drop Down list used for the *Type* field of *Special Dates*.
- Next, customize the "Referral Thank You" letter by going to Global Defaults then Document Templates and loading the 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.
- Have your agents retrieve the profile for the customer who referred the new business and have them go to the Special Dates area of the General Info and enter today's date and a select "Referred a Client" to the Type.
- Once a week, or at least monthly, use the Level 2 Query to look up any customers who referred business your way, by using the Special Date From and To dates along with the Type set to "Referred a Client".
- 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 Fields and in the new profile have the 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 so 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 Practice #7: Send Welcome Home Letters to customers returning from a vacation you planned.**

- There are two ways of approaching welcome home letters. Either your agents can be responsible for sending out these letters using the Reminders in the ClientBase Plus Res Card, or you can streamline the process and have an administrative person send these out each day.
- In either scenario, your first step is to go to Global Defaults and Document Templates and load the default "Welcome Home" letter and customize for your agency. Add a line in the letter advising the client that "I will be calling you in the next 'x amount' of days. It's much better to call a client after they return for various reasons. Agents can find out if there were any problems and address/resolve them, plus add to the res card Client Feedback area for future use. Also they can ask where the traveler is interested in going next time and a new Res Card can be started with a Reminder to follow-up. (Use the Welcome Home as a call reminder, and even put a note in to change the Status/Cycle of the res card to keep it up-to-date.)
- Train your agents to create a "Welcome Home" *Reminder* from the Res Card, although reminders can be created directly from the client Profile.
- Schedule the Reminder for the week customers are gone on their trip so the welcome home letter is waiting for them upon their return. Set the Subject of the Reminder to "Welcome Home". Set the User to either the Agent or the Administrator--whoever is responsible for printing and sending the letter.
- If agents are sending, they can do the letters individually after appearing on their Activity Manager To-do list. From the profile, simply click *Merge to Letter* and select the Welcome Home template. Don't forget to create a mailer!
- If the administrator is trying to streamline, he/she can use the Level 2 Query to Query all profiles with Open Reminders with a Subject of "Welcome Home" for the entire week and send them all at one time.
- In the Level 2 query click the Activities tab, check Reminders Not Completed/Not Responded, enter the current week's date frame into the Activity Date From/To fields and set the Subject to "Welcome Home".
- From the results of the Query click on Merge to Letter, select the Welcome Home template, print and mail. Don't forget to create a mailer!
- You may consider including some type of survey on their interests for their next vacation as well as to educate your agents on the client's experience.



**Best Practice #8: Use holidays such as Thanksgiving and New Year's as an opportunity to thank your customers for doing business with you.**

- By now you've probably got the swing of doing queries and from the Results either perform a Merge to Letter, E-mail, or Label. This Best Practice is probably the easiest of them all as there really is no preparation involved other than keeping current addresses or e-mails.

- Either purchase the desired holiday card, or if you have someone capable of creating HTML for you, create a holiday e-card. Or, subscribe to a service such as AiPlus Postcards for a large selection of html postcards to choose from.
- Use Level 2 Query to filter out to whom you would like to send the card, or include all Leisure and Corporate clients.
- From the results, click *Merge to Label* if you have pre-printed cards.
- From the results, click *Merge to Letter* if you want to send a holiday letter.
- From the results, click *Merge to E-mail* if you would like to send an e-card. If the e-mail you would like to send is HTML then make sure to set the *Mode* to *Raw HTML*. Copy the raw HTML into the body or use the *Copy from Manager* button if the HTML is being previewed in the Internet Manager (eg. AiPlus postcards).



**Best Practice #9: Track Birthdays, Anniversaries, and other special dates and use them to strengthen the relationship with your customers.**

- Sending a birthday card or anniversary card every year might be a bit much, but can be very effective when timed with the big ones such as 40<sup>th</sup>, 50<sup>th</sup> or 60<sup>th</sup> birthdays, or 1<sup>st</sup>, 5<sup>th</sup>, 10<sup>th</sup> or 25<sup>th</sup> anniversaries, etc. Especially if you plan someone's honeymoon, there is nothing like sending a 1<sup>st</sup> year anniversary card to impress them.
- Some take the approach of sending traditional cards. Others take the approach of a letter that may even suggest the opportunity for travel as a way of celebration.
- In either case, train your agents to use Special Dates in the General Info tab to track Anniversaries, and the Family/Employee record to enter the birthday (since birthdays are traveler specific).
- To query for upcoming Anniversaries, use the Level 2 query and the Special Date From/To as filters. If for example, in December you are looking for 1<sup>st</sup> year anniversaries this month, then enter December 1 of the previous year in the From field and December 31 of the previous year in the To field. (Subtract 5 years, or 10 years etc. from the year for other big anniversaries.)
- Use the same logic for birthdays but use the Family/Employee tab and the Birthday From and To fields.
- When your desired results appear on the screen, use the Merge to Letter, Label or E-mail to send the desired communication. Don't forget to create a mailer!



**Best Practice #10: Use the Special Dates or Marketing Codes to track regular vacation time. Then, as your client's travel professional, be sure to follow-up well before to see about making any necessary travel arrangements for them.**

- My family and I, very much like other families with school-age children, take a trip every July (summer break) and the last two weeks of the year (winter break). Since both cases are generally high-season travel, a reminder in advance to get going on the plans is much appreciated.

- My brother's company is closed every year the first 2 weeks in July. When he vacations can be predicted to the week!
- If you make "Welcome Home" calls in addition to letters, use that opportunity to find out when they think the next vacation will be.
- A couple months before the scheduled vacation time make a call or send an e-mail (use plain text in this case to make it personal). Keep it as simple as "you are checking in to see if a vacation is in the plans for the upcoming vacation and if you can be of any help just let you know".
- Use the Level 2 Query to filter using Special Dates, or Marketing Codes and from the Results use Merge to E-mail, or to obtain a phone list, go to **Reports | Profile Reports | Lists**.



**Best Practice #11: Send letters to customers who haven't booked with you in awhile. Acknowledge that you miss their business.**

- If you have TRAMS Back Office or have been invoicing in ClientBase, you can easily find customers that haven't booked with you recently by doing a Level 3 Query. First set the Profile Type to Leisure or Corporate, then click the Travel History tab and use the Invoice Issue Date From/To fields as your filter.
- If you want clients that haven't booked with you in the last 2 years then set your Search Operator to "Exclude" and enter =0,0,-2 in the From and =0,0,0 in the To. The last digit in date formula entered in the From field reflects the number of years back that you want to search.
- From the results click on Merge to Letter and select a letter that you have customized from **Global Defaults | Document Templates**.



**Best Practice #12: Use AiPlus e-Postcards to step into e-mail marketing.**

- Looking to take a baby step into e-mail marketing? AiPlus e-Postcards is a great place to begin. They do have a small annual subscription fee (less than \$100) but provide you with a large variety of colorful, thematic, HTML postcards that you can easily personalize and blast from ClientBase.
- To take a look at what AiPlus has to offer, click the Internet Manager in ClientBase and then click the AiPlus link. On the login page enter Kenj in the User Name and trams1 in the Password. (Don't send any actual e-mails using this login as the TRAMS information appears at the bottom of each postcard.)
- AiPlus has postcards targeted towards Leisure travelers, Corporate travelers, specific destinations or special occasions. Just pick a post card and the target audience you want to send it to and take the following steps.
- Using ClientBase Plus, create a Document Template including the merge fields you would like to include on the postcard and a very brief message (remember it's a postcard). Copy the body of the template to your clipboard (Ctrl C) and then navigate to your Internet Manager.

- From the Internet Manager log into AiPlus and select the desired postcard. Paste your message into the body (Ctrl V) and then click on Display Message to get a clean view of the postcard.
- Click on the Profile Manager and query the desired profiles you would like to send the postcard to.
- Click on Merge to E-mail, set the Mode to Raw HTML and click the button "Copy from Manager". All of the AiPlus HTML will be copied. Click the Preview button to verify how it will appear when sent and after entering a Subject and verifying your SMTP Settings, click *Send All* after creating a mailer.



**Best Practice #13: Sign up with TMA for free e-mail marketing opportunities with the Vendors that are your preferred.**

- Want to send out professional HTML promotions to your clients quickly and easily? Need more marketing content?
- TMA – Travel Marketing Associates provides turnkey HTML promotional content and support free to ClientBase users.
- Such vendors as Seabourn, Carnival, Trafalgar, and many more work with TMA to provide content and training enabling ClientBase agencies to send personalized and professional promotions to clients.
- TMA folks are professional marketing people that can also create individual marketing pieces for agencies at very reasonable prices.
- Click on *E-mail Marketing with TMA* in your Internet Manager for more information.



**Best Practice #14: Collect special interest articles from travel publications and send to targeted audiences.**

- Use the Sunday travel section of your local newspaper, or travel magazines such as Conde Nast Traveler, or the Internet to find unique travel articles targeted to niche markets.
- Query your database using the Level 2 Query and your Marketing Codes by Interest or Destination.
- Photocopy the article and attach a brief note.
- Use Merge to Label from the results of your query to print out labels. Don't forget to create a mailer!



**Best Practice #15: Before going on a fam trip run a list of clients that are interested in that destination and send them a post card while you are there.**

- Nothing like a postcard from an exotic location to get you in the mood to travel.
- Next time you or an agent go on a fam trip, use the Level 2 Query to query for all clients who have an interest in the destination you are going to. For example, you or

one of your agents is going to the Galapagos Islands. Query for all clients interested in the Galapagos Islands or Ecuador or South America depending on how you have your Marketing Codes setup.

- From the results click *Columns* and arrange your columns so that the name, full address fields and salutation field is included.
- Now that the necessary information is appearing in your query results print a listing by going to **Reports | Profile | Current Query Results**.
- If you have too many results to hand write the postcard addresses, use Merge to Label to print out labels. Don't forget to create a mailer!



### **Best Practice #16: Send out Passport renewal reminders.**

- Only true travel professionals take their role as travel advisors seriously enough to send out Passport renewal reminders.
- First go to **Global Defaults | Document Templates** to load and customize the default Passport Expiration Letter. Create a mailer!
- Next, use the Level 2 Query and click on the Family/Employee tab to enter your Passport Expiration Date From and To fields. Since these types of letters can probably be done on a quarterly basis, enter the upcoming 3 month time frame and click *OK*.
- From the results click on Merge to E-mail if you would like to e-mail the letter (Document Templates is one of the E-mail Modes) or click on Merge to Letter if you would like to print and mail the letter.



### **Best Practice #17: Track how many new Trip Inquiries came into your agency in a given day, week or month. Make sure proper follow-up is in place to close the sale.**

- If your agency has completed the QuickStart Training program then your agents have already been trained to create a new Res Card with each new leisure trip inquiry.
- This habit makes it possible for you to see how many trip inquiries came into your agency in a given day, week or month, a good indication on how well your marketing is doing. It also gives you the opportunity to see the current Reservation Cycle and statistics for closing percentages.
- From your Res Card Manager click on the Level 2 Query tab then click on Filter. Use the Res Card Create Date to query your new Res Cards. Use the following date formulas:
  - From =-1,0,0 To =-1,0,0 (Gives you yesterday's inquiries)
  - From = -7,0,0 To = (Gives you inquiries for the last week)
  - From =-30,0,0 To = (Gives you inquiries for the last month)
- From your Query results use your **File | Save Query As** feature to create a default folder for the desired filters above.
- From your Query results click on Reports/Res Card Reports then Reservation Cycle Report to get statistics on the Reservation Cycles for the current query.
- From your Query results click on the Columns button and add RESCARD.Res Cycle to the "Fields in Columns" and then click the Sort By Columns tab sort on this field.
- Retrieve each Res Card that has not yet been booked and verify that the agent has a Reminder scheduled for future follow-up. If not, create one for her/him and set an Alarm so she/he is sure to see it.