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### **2-TA Administrative1 Forms - Product ID TA-1200SF**

The following forms are contained within this package. Once downloaded these forms, document and worksheets can be used as masters, branded, and then copied to your desktop each time you want to use them.

#### **1-Form 1201AF©2017- Client Trip Planning Questionnaire (for Office Use) (PDF & Static Word Document)**

◆ This form is used to qualify the clients regarding the trip they are planning with you. These questions will provide most of the answers you will need to begin the process and give you some insight on their needs. As you research and gather more information you will have other questions to ask the client(s) as well. This questionnaire helps get the ball rolling. For Office use however, you can also send it to the client to fill out if you prefer. But I have found it is more personal to go over these questions with them on the phone or in person.

#### **2-Form 1202AF©2017- Client To Do List (for Office Use) (Static Excel Sheet)**

◆ This form is used by the agent to keep track of the trip planning process with step by step reminders. You can remove my notes in the right column and replace with your own. It is pretty cut and dry.

#### **3-Form 1203AF©2017- Welcome Aboard Letter (for client) (Static Word Doc Letter)**

◆ This letter is sent to the client(s) after I receive their signed profile paperwork. This letter thanks the client for choosing our agency, summarizes who we are and what we do. It gives them links to our website and blog and welcomes them aboard. Just another way to stay in touch and show you care are sincere and professional.

#### **4-Form 1204AF©2017- Welcome Back Letter (for client) (Static Word Doc Letter)**

◆ This is an important letter to send to the clients. It lets them know that you haven't forgotten them and would like their feedback and reviews of their recent trip. I send this letter via email a day before the client returns home. A reminder is added to my Outlook calendar for each client's return date so I don't forget to send it.

#### **5-Form 1205AF©2017- Vacation Survey (for client) (PDF and Static Word Docs)**

◆ This survey is very helpful because it asks the client to review various aspects of their trip and also to give your services a rating. Most of my clients fill out the form and return it; some will call me and tell me about their trip, while others will add a testimonial to my website. It is an option and their choice. It pays to ask for their reviews though because you can let the suppliers know if something went wrong or was dissatisfactory. I send this survey along with the Welcome Back Letter the day before they return home.

#### **6-Form 1207AF©2017- Agency Disclaimer (for client) (Static Word Docs)**

◆ This disclaimer gives information for which the client needs to be reminded; I send it with their final documents.

#### **7-Form 1208AF©2017- Client's Pre-Travel Check List (for client) (PDF and Static Excel Docs)**

◆ This form is a reminder about things clients should do before travel commences like arrangements to make, documents to gather and things to pack. I send this along with their final documents as a courtesy.

### **BONUS FORM (Complimentary)**

#### **Form 1206AF©2017- Child Consent Authorization Letter (for client) (PDF and Static Word Docs)**

◆ This letter is important and necessary whenever child/children is/are traveling alone or with only one parent or a guardian. The custodian parent must give his or her consent for the child to travel. This consent form is required by the airlines, without it a child will not be able to take an international flight.