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3-TA Administrative2 Forms - Product ID TA-1100AF

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

1-Form 1101AF©2017- Cruise Planning Questionnaire (PDF & Static Formats)

These are questions that I usually ask a client when planning a cruise whether for individuals or groups. I prefer to banter and exchange ideas with my clients to create ease and trust. You can add more questions to this document. You or the client can fill out the questionnaire, whatever you prefer to do.

2-Form 1102AF©2017- Cruise Quote Worksheet (for office use) (static)

This is the form I use to keep track of the expenditures and quotes as I get them for the client (for office use only). This information can be later transferred to the Client Trip Budget Cost Breakdown to send to client. It not only helps me keep track of their expenses for budget, it also gives me an estimate of my commissions.

3-Form 1103AF©2017- Cruise Vacation Quote Comparisons (for client) (static)

This worksheet is for comparing two different cruise lines with similar itineraries and for generating quotes for the client(s). It helps them decide on which cruise or cruise line to choose. They appreciate seeing the comparisons. This form works well for clients who have not decided on a specific cruise or cruise line.

4-Form 1104AF©2017- Hotel-Resort Quote Comparisons (for client) (static)

This worksheet compares the costs of staying at different hotels in the same city or several different cities. The Hotel-Resort form is for generating quotes and comparisons for the client to decide where they would like to stay on their trip. My clients really like this sheet of information. This is good for electing to stay at one hotel or resort.

5-Form 1105AF©2017- Romance Questionnaire (PDF & Static Formats)

These are questions that I usually ask a client when planning a romantic trip whether for individual couples or groups destination weddings. You can add more questions to this document. You or the client can fill out the questionnaire.

6-Form 1106AF©2017- Client Trip Budget Cost Breakdown (for client) (Static Format)

This spreadsheet is for breaking down your client's trip costs for them. Whether a client asks for this cost breakdown or not I always supply one. It is easy to fill out and send to the client once you have received all the quotes from the suppliers. It also helps you stay on budget for the client as you add each component of their trip.

7-Form 1107AF©2017- Trip Summary-Itinerary (for client) (static) (3 forms)

This is a summary of the clients' itinerary. This form is filled out by the agent after receiving all the trip/product confirmations. It is given to the client along with their final documents. I make a copy to put into their physical folders with their trip docs. There are three forms on this worksheet (*Hotels, Cruises, Pre or Post Stays*).

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4-TA Office Administrative3_Forms-Worksheets (Groups) Product ID TA-1000AF

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

1-Form 1002AF©2017- Group Trip Questionnaire (client) (office use) (static)

◆This questionnaire form is used for groups with questions to ask the group leader. It can be modified to suit your needs. This form uses very basic open and closed end questions.

2-Form 1003AF©2017- Cruise Group Ship Quote (client) (static)

◆This worksheet is used to work on group cruises to gather all the information needed for cabin quotes for group. Then can add information to the quote worksheet to give clients for their proposed cruise. You can convert this form to a pdf after filling out for client. Mostly used to Compare the price of two different Cruises or Cruise Lines if necessary.

3-Form 1004AF©2017- Group Form - Tour Operator (office use) (static)

◆This form was originally designed to give to Tour Operators. Now it is used as trip information and to keep track of the group. I get the answers from the group questionnaires to fill this out.

4-Form 1005AF©2017- Group PAX List for Client (pdf-static)

◆This spreadsheet is for gathering the contact/travel information for the group members. I give this to the group leader to fill out and return to me so I have a list and she/he has a list. Has people are added the list is updated.

5-Form 1006AF©2017- Tour Passengers Accommodations List (office use) (static)

◆This form is for keeping track of the tour group travelers sharing rooms. It has basic contact information for Primary passenger in each room. A copy of this list can be given to the tour operator if needed.

6-Form 1007AF©2017- Group PAX Flight List (office use) (static)

◆This form helps keep track of the flight information for each passenger in a group. It saves time from sorting through the paper work of the individual confirmations because some passengers may be on different flights. Detailed passenger info for your group is on this sheet. *(For office use only).*

7- Form 1009AF©2017- Rental Homes-Villas Quotes (client) (static)

◆This form is for a quick comparison between rental properties (Homes, Villas, Castles, etc.). It gives clients a few choices for rentals. I usually send three to four properties for them to look at and make a decision.

8- Form 1010AF©2017-Group Form for Cruise Line (office use) (static)

◆This form is for office use when planning a group cruise. All the useful information you will need to know about your group is on one sheet. This form is similar to the one used for Tour Operators/Groups.

BONUS FORM (Complimentary)

Letter: Why We Recommend Travel Insurance (client) (static)

◆This one page document is an explanation for clients as to why we recommend travel insurance, the benefits and risks. I created this to send out with the quotes and insurance brochures or if a client was on the fence about buying it. It helps a lot!