

ROADMAP TO BECOMING A Travel Advisor



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American Society of
Travel Advisors

Roadmap to Becoming a Travel Advisor



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This course was developed in partnership with Host Agency Reviews and its founder Steph Lee. Due to the nature of their business, some of the material found within this course may be similar to offerings of Host Agency Reviews.

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About the Author

Steph Lee is the founder of the website Host Agency Reviews, a content hub that aims to help new advisors start their agencies, in addition to helping experienced advisors grow their agencies. Her travel career started earlier than most when her parents started a home-based travel agency during her high school years.



Like any good child born into a family business, she was convinced she wanted nothing to do with her parents' company after leaving home. While figuring out what she wanted to do, she worked some interesting jobs including a ski lift operator, tennis instructor, astronomy teacher and her favorite, an environmental educator. Her only clear goal during this time was avoiding a cubicle.

Eventually she landed back in her home state of Minnesota and settled in at- yup, you guessed it- her parents' company, where she worked to build their host agency division into a \$50M agency. She left to start Host Agency Reviews in 2012.

Through the years, Steph has presented at numerous industry events and has been lucky enough to be recognized with a few awards like ASTA's Young Professional of the Year Award, Minnesota Business' Young Entrepreneur Award and Travel Agent Magazine's 30 under 30. She aims to one day get an award that has nothing to do with being young.

When she's not writing witty third person bios of herself and feeling kinda ridiculous about it, Steph loves to spend time with her two adorable pups and revel in all the small joys that pop into everyday life. She's also an avid tennis player and cross-country skier who loves snow more than anyone you've probably met.



Purpose of The Course

Hello, hello!!!

Well, it is always wonderful to meet a fellow lover of travel! I'm Steph Lee, the founder of Host Agency Reviews, and I'll be your guide as we tour the industry and get you set up for success!

I literally grew up in the biz, with my childhood home doubling as my parents' home-based travel agency. And that's where the travel industry bug bit me. It's important to note the travel bug, while in the same genus as the travel *industry* bug, is a separate species.

I'm guessing that you too have been bit by the travel industry bug! What does that mean? If you ask anyone in travel, you'll discover that once those little bugs take a bite out of you, your heart is forever tied to the travel industry. You'll fall in love with it and it's a hard industry to leave.

So, I'm glad you're here. You're right where you belong. Now let's get down to business!

As you can imagine, there's tons of ground to cover whenever you're talking about an entire industry. In fact, you'll soon find out that there is a mind-boggling amount of nooks and crannies to explore when it comes to the travel sector. While we won't be able to take deep dives into all of them, the goal is that when you reach the end of the coursebook, you'll come away with the following:

Host Agency Reviews is a website that connects travel advisors to industry resources, i.e. to host agencies, franchises, consortia, and industry events, through our blog and podcast.

-
- 1) a good feel for how the travel industry operates
 - 2) an understanding of the tools and techniques advisors use to book trips and ensure the safety and happiness of their clients

Hint: There is a whole lot more to booking travel than most consumers realize!

- 3) some tips and tricks to help you secure a position as a travel advisor
-

I'm so excited to get started, so let's not wait another minute!

Who This Course Is For?

Since we're giving a broad overview of the travel industry, this course would provide value to anyone looking to enter the travel industry.

**However, the main audience is people interested in a
travel advisor career.**

Whether you're looking to be a corporate or leisure advisor, a luxury or adventure advisor, this course will give you the building blocks you need to start your career. We'll be focusing on frontline travel advisors who would like to land a job at a leisure or corporate travel agency.

What about starting your own travel agency business? While we do touch on some aspects of starting your own agency, that is not the focal point of this course. However, Host Agency Reviews' free 7-Day Set Up program is a great starting point if that's something you want to explore. There is a hyperlink to the program in the resource section at the end of the chapter 26.

What You'll Be Learning

With over 240 pages, you'll definitely be learning a lot! But don't be intimidated by the number of pages. I've been told I'm a very conversational writer so it will be like we're just hanging out for hours and hours.

Here's a quick overview of the lessons I'll be going over with you:

Section One: Knowledge Chapters

Think of these as the building blocks of your industry knowledge. We'll cover the nuts and bolts of how the travel industry works.

Section Two: Interactive Chapters

This is where you're going to put on your travel advisor hat and work through some guided booking exercises.

Section Three: Finding Employment

Our final lesson will give you the road map to find your dream travel advisor job, offer pointers to stay engaged and we've even brought in a handful of advisors with some **What I Wish I'd Known** tips to success. How's that for going out with a bang?!

Taking This Course

The course materials consist of 4 instructional videos, 3 demonstration videos, this detailed workbook and multiple exercises.

For each chapter there are hyperlinks to supplement readings and resources as well as podcast/audio interviews with travel advisors on how they do what they do, what they do. After completing the course, there is an exam available based on information that can be found within the workbook and/or the videos. You will earn your certificate of completion after passing the exam.



CHAPTER 1 | Truth About Being an Advisor

I cannot lie, **the travel industry is F-U-N**. You get to meet people from all over the world, travel to beautiful destinations, experience new cultures and— this is the best part— get paid for it!

But. (Sigh. There is always a but, isn't there?)

When you enter the travel industry, you'll find that your social feeds will suddenly be filled with pictures of colleagues and work acquaintances globetrotting. All. The. Time. *Oh, there's Sandra on the beach in Mexico. Rebecca trekking with the gorillas. Chris checking in at the Hôtel Ritz Paris.* You'll have some serious cases of FOMO (Fear of Missing Out).

It's downright dreamy. However, as you wade in, you'll discover an open secret in the travel industry. That behind those envy-provoking pictures is a travel advisor working their tail off. They get up at 6am to start a string of hotel inspections. They're on their feet seeing as much of the destination as they can until 8pm when they put their feet up and start the evening networking over dinner and drinks. In between, they're posting photos to inspire their clients and promote their knowledge and connections.

When I went on my first FAM (familiarization) trip to Ireland as a 26-year old, I was completely unprepared for the amount of work ahead of me. By the end of the week, I'd lost 7 pounds from walking miles every day and had managed to fall asleep at dinner. (A pro tip for you: Sleep on the plane ride over. And always, always bring a pair of comfortable shoes on FAM trips.)

Was the Ireland FAM worth it? Heck yeah! I had a blast. We stayed in castles and 5-star hotels, made amazing connections and saw so much of Ireland. That's what the travel industry is. We work hard and we play hard.

Travel Advisor vs. Travel Agent

One thing that's important to understand before we dive in is the difference between a travel agent and a travel advisor. In 2018, ASTA officially changed their name from the American Society of Travel **Agents** to the American Society of Travel **Advisors**.

You may be thinking, That's just semantics.
They both mean the same thing. **Not quite.**

The role of travel agents really changed with the advent of the internet. Prior to the world going online, travel agents were gatekeepers. They had access to supplier and airline inventory that the general public did not. They had knowledge that your average consumer could not find or know. But the move of travel onto the world wide web changed all that.

Suddenly travelers had access to booking engines and could look up industry knowledge with a simple Google search. Airport codes, once the secret language of advisors, became common knowledge.

Travel agents evolved into travel advisors as they found their niche in this new ecosystem.

While both agents and advisors book travel, the way in which they do it varies drastically. A travel agent is an order taker. An advisor uses their knowledge and industry connections to help the traveler find the best option.

Consumers can use Mint.com or other online money management tools to handle their finances on their own, but some consumers prefer to work with a financial advisor. The financial advisor is dedicated to personalizing their client's financial success and uses their industry insights and connections to do so.

The same is true for travel agents. Yes, you can book online or call an agent to do a transactional booking (e.g., I need four tickets from MSP to LAX Jan 3rd through the 5th), but a true travel advisor gives a very different experience.

This course is about teaching you to be a **travel advisor**. Instead of transactional bookings, you will know the questions to ask travelers to ensure the properties (that's travel lingo for hotel/accommodation/resort) they are staying at meet their expectations. Due to the higher level of service advisors provide, they also tend to work with clients with larger budgets. Travel advisors have the industry term known as *duty of care* which we will touch on in Chapter 10. In short it means if you are going to work as a travel advisor, your clients should reasonably be able to expect that you are not going to put them in a dangerous situation.

In our example above, an *agent* would give a few different flight options and then they would book the tickets for MSP to LAX, Jan 3rd-5th.

An *advisor* would make sure the client understands the choices. If the traveler's mom was turning 70 on the 3rd and that's why the family was heading to Los Angeles, the travel advisor would bring up the option of flying in the night before since the birthday brunch starts at 10am. After all, if the flight is delayed the family may miss the big birthday party, the whole point of the trip.

An *advisor* would point out that while the basic economy fare is the lowest price, since they are flying with two kids under the age of 8, they may want to look at booking the main cabin so they can select their seats prior to check-in, increasing the likelihood of the family sitting together. An *advisor* would point out that basic economy equates to a throwaway ticket if you miss the flight. There are no refunds and no rebooking on a later flight if the kids caused you to get out the door late. Booking in a higher class gives the family the peace of mind if they aren't able to make their flight, that they will have not lost their money.

An *advisor* would know that one of the travelers is 6'2"+ and would suggest Comfort+ because that means an extra 4" of legroom. Plus, that class of service has dedicated overhead bin space.

Does that make the difference between a travel agent and a travel advisor more clear?

If not, listen to/watch this episode of *Travel Agent Chatter* where I talk with a destination wedding specialist. He has a passion for and deep knowledge of how to ensure the destination wedding goes off without a hitch. He's a travel advisor.

Interview with Travel Advisor, Will Medina

Take some time to listen to Will Medina [a destination wedding expert. Will talks about what social media platforms he uses to sell around 1 million in travel](#)



Or watch/listen to the episode linked below with a Japan expert. You immediately know that he is a travel advisor and not a travel agent. His on-the-ground connections, love of Japan and the pain-staking way he details out his custom trips guarantee clients will have the trip of a lifetime when they book with him.

Interview with Travel Advisor, Andres Zuleta

Let's listen to [Andres Zuleta, owner of Boutique Japan](#). Andres started out as a trip designer for a travel company and ended up growing his own agency into the 2.3 million business it is today.



So, what do you say? Shall we start your journey to becoming a travel advisor? Let's do it!



Audio Series - episode Vol. 9 *Travel Agent Chatter*

Interview with Will Medina [a destination wedding expert. Will talks about which social media he uses for his business where he sells around 1 million in travel.](#)



Audio Series - episode Vol. 12 *Travel Agent Chatter*

Interview with Andres Zuleta [who specializes in selling Japan. Andres talks about how his agency gets his revenue from fees and not commissions.](#)



CHAPTER 2 | History of the Industry, Including ASTA's Role

Before we deep dive into the workings of the travel industry, let's take a quick look back in time to help us understand how we ended up where we are today.

1930s

In 1931, ASTA was formed. But it wasn't the ASTA we know today. Back then, it was the American Steamship and Tourist Agents Association. And I know what you're thinking. Steamships? Yup. This was before the days of commercial air travel.

In fact, in the 1930s, 80-90% of all steamship travel was booked by agents. This burgeoning market is why more than 60 agencies joined forces to create ASTA, an association whose goals included: to protect and promote the mutual interests of its members, maintain a dignified code of ethics, combat unfair competition, stimulate the public's desire to travel and promote the use of ASTA members' services.



1940s

Let's keep moving through the decades because the 1940s caused some serious issues for travel agents. WWII meant ASTA members were fighting for their survival as travel was stripped to only essential travel. But the bad news wasn't

over for agents. In 1946, the newly formed International Air Transport Association (IATA), cut air commissions from 7.5% to 5%. Ouch.

1950s

In the 1950s, as travel picked up and incomes grew, ASTA grew along with the economy. ASTA also changed its name to the American Society of Travel Agents. (Sigh. Goodbye steamships.) Big accomplishments this decade included ASTA winning a fight to give agents commissions on rail travel. I mean, that's definitely impressive, but when I found out it was a 27-year battle, I was next-level impressed.

1960s

And the 60s. Oh my gosh, the 60s! The craziest thing happened in 1968. Lyndon Johnson's administration— apparently thinking *really* outside the box— proposed an international travel tax on US citizens to help with the budget deficit. They wanted a 5% tax on international air/ship travel and a 15-30% graduated tax on per diem expenditures above \$7. As you can imagine that didn't go over well with . . . well, anybody. ASTA led the largest grassroots campaign in its history to defeat the proposal.

If you're a history nerd like me, you might enjoy reading some of the letters submitted that opposed the proposal there is a link in supplement reading at the end of this chapter.

1970s

As we saunter into the 1970s, we see airline deregulation. That led to the first rise in airline commissions in 25 years— from 5% to 7%. Heya! The training ASTA pioneered started in the 1950s continued to expand, holding some fun-sounding events like Cruisefest, Trainingfest, School on Rails, School at Sea and School on the Road.



1990s

Let's jump to the 1990s, a dark era for travel advisors. As the internet transformed the world, travel agents struggled to find their place in a new reality where people could, for the first time ever, book their own tickets.

In 1995, seven major US airlines capped commission on domestic air tickets at \$50. This was a huge blow to travel agencies. By the end of the decade, air commissions were cut or capped five more times.

2000s

When we look at the 2000s, things were still pretty tough for travel advisors. The number of storefront agencies were decreasing and online travel agencies (OTAs) were gaining market share.

But all is not doom and gloom! It's around this time that agencies started to harness the power of the internet to help them survive. While the number of storefront agencies were decreasing, a new business model started to take hold in the industry: Host agencies.

Host agencies allowed agencies to consolidate their buying power and bring costs down. While plenty of storefront agencies remained, there was a definite trend towards hosted agencies, who were often home based.



2010s

ASTA has played a pivotal role in representing travel advisors' interests in Washington DC. In 2018, they rebranded to the American Society of Travel

Advisors, which reflects the shift from travel agents' interactions being transactional with consumers to a more advisory role, like that of financial planners.

While battles are fought every year—such as preventing airlines from passing on merchant fees to advisors and



protecting agencies from increased tax rates. In 2019, ASTA scored what is considered the biggest win in decades: the exemption of independent contractor (IC) travel advisors from California's AB5 bill, which aimed at reclassifying ICs to employees.

2020s

And that brings us to today. As I write this, the coronavirus pandemic is in full swing globally. The travel industry is sure to change as a result of this industry-stopping event, but exactly how it will change still remains to be seen.

SUPPLEMENTAL RESOURCES



Article about the American Society of Travel Advisors (ASTA) in the travel trade media

ASTA had one of the biggest wins in decades: the [exemption of independent contractor \(IC\) travel advisors from California's AB5 bill](#), which aimed at reclassifying independent contractors to employees.



Lynden Johnson 1963 proposal for an international travel tax on US citizens to help with the budget deficit

You might enjoy reading some of the [letters submitted that opposed the proposal](#).

SECTION ONE

Knowledge Chapters



CHAPTER 3 | Industry/Accreditation Numbers

Alrighty, enough of that background information, right? Let's dive into the day-to-day things you need to understand as a travel advisor!

First things first. Let's start with what makes a travel advisor a travel advisor. Yes, there are lots of skills and characteristics, but more importantly, **how are travel agency bookings different from a consumer booking?**

Enter, accreditation numbers.

There are multiple accreditation options in the travel industry but they all play the same role, to help suppliers recognize you as an agency. I like to think of accreditation numbers as the social security number of the travel industry. It's not something you want to share and publish to the broader world, but you have to give it out a surprisingly large amount of times to identify yourself.

Why do suppliers need to identify your agency? Well, for one, so they can track how many bookings are coming in from your agency. Accreditation numbers are also tied to your commission with that vendor.

So let's say you call a vendor to make a booking. The first question they'll ask is for your 8-digit accreditation number. They type it into the system and now they have all your agency details handy.

As I mentioned before, there are multiple accreditation numbers in the industry. Here's a list of them and some details to know about each:

- **ARC number:** Doled out by the Airlines Reporting Corporation, an ARC number is required once they accredit you to issue air tickets. If you're a US-based agency, an ARC number is mandatory if you're booking airline tickets through a GDS (Global Distribution System). More on ARC, agency accreditation and air ticket settlement later.
- **VTC number:** The VTC (Verified Travel Consultant) number is also issued by ARC, with the big differentiator being that the VTC number does not allow you to book air tickets in the GDS system and has fewer qualification requirements.
- **CTD number:** ARC's Corporate Travel Department number is similar to an ARC number but for companies that regularly book air for their employees and only their employees.
- **CLIA number:** Issued by the Cruise Lines International Association, this accreditation number is a great option for people that focus on booking cruises. It is also accepted by non-cruise suppliers. You are not able to book air in the GDS system with a CLIA number.
- **IATAN number:** Provided by the International Air Transport Association Network, an IATAN number is the same number as your ARC number. For US-based agencies, an ARC number is required in order to issue air tickets. Advisors that provide proof that they earned \$5k worth of commissions or salary during the past 24 months are eligible for an IATAN card, which can offer some industry perks.
- **TIDS:** IATAN created the travel industry designator service for non-ticketing agencies that do not book air in the GDS system.
- **TRUE number:** Created by CCRA Travel Commerce Network, a TRUE number is similar to a CLIA number in that you are not able to book air through the GDS. The other important thing to note is that Marriott does not recognize the TRUE number and Disney does not give advisor discounts to TRUE agencies.

It's not uncommon for agencies to have an ARC, IATA and CLIA number. You're probably thinking, *"That's horrible that you need to memorize all these numbers!"* Fear not. The accreditation agencies have worked together so that your ARC, IATA and CLIA number are the exact same. Whew.

I want to make sure that I'm giving you the most up-to-date information on accreditation when it comes to cost, what's required, etc. Since this course is more static, I'm going to have you use the links at the end of the chapter to head on over to ARC and Host Agency Reviews to get the latest numbers on the accreditation numbers costs, requirements and other fun details!

SUPPLEMENTAL RESOURCES



ARC - Information on being ARC Accredited Agency

ARC [enables U.S. travel agencies to easily ticket flights worldwide on more than 200 airlines](#). The key thing here is that this is for travel agencies. This link takes you where you would apply for an ARC number if you are going to start an agency. Please note that as a travel advisor you would use your agency's ARC number or as a hosted advisor, you would use your host's ARC number.



Host Agency Reviews - Accreditation Information

Get the [more information on accreditation numbers costs, requirements plus several audio recording with the companies who provide accreditation numbers to the travel agency industry](#).



CHAPTER 4 | Licenses

We've made some progress! You've laid the first stone in your foundation of understanding how the travel business works. Next up, something super exciting. I mean, this topic makes people go crazy with excitement.

Licensing. Well, really Registration Requirements.

A thrilling topic. But don't worry, we'll make it fun(ish)!

Currently in the US travel industry, travel advisors aren't officially licensed. That is to say, that when you become a travel advisor, there isn't a test you need to take to demonstrate you have a base level of knowledge.

Another way to say it is travel advisors don't get to have a cool licensing certificate to hang in their offices. No foil stamp either.

I hope that one day we get there but the challenge with licensing for travel advisors is that there are so many different types of advisors. You have corporate advisors, leisure advisors, meetings and incentive advisors, advisors who specialize in groups. They all have really different roles and responsibilities. And while they all book travel for clients, the tools and suppliers they use to do so are different for each niche.

But . . . it's not completely the Wild West in the travel industry. There are some states out there that took matters into their own hands and set up licensing-like regulations on a state level.

What does this mean? It means that if you are a resident of a state with licensing or you have clients that are residents of/live in a state with licensing, the agency has to apply for what's called a ~~S~~eller of Travel registration. And, while it is called a ~~S~~eller of Travel license it's really more of a state registration requirement. As currently there are no states with actual licensing regime.

*Before we look at which states have the licensing/registration requirements, let's me go on a little side tangent. This course is about how to become a **travel adviser**, not how to start your own business, e.g., setting an LLC or sole proprietorship, registering your business, financials, etc. But since many individuals who come into the travel advisor industry do consider starting their own business it so good to be aware of that state requirements exist.*

We currently have four states in the U.S.A. that have Seller of Travel (SOT) laws. Like the last section, I'll break down the big picture details but will provide a link at the end of the chapter to where you can find the most up-to-date information on seller of travel license pricing.

California

Let's start with California because it will make everything after it seem less complicated!

Another side note... fun huh?! California is indeed very complicated, and all of the complexities of the law are not covered in this course. There are links to the California SOT requirements in the supplemental reading at the end of this chapter.

California has tied its SOT registration into its business licensing. Not a big deal for agencies that are located in California because they've already registered their company with the state. The problem comes for agencies with clients in California, but their agency is located outside California. They have to register as a foreign entity organization in California before they can get their SOT registration.

BUT! There are some exemptions. (Phew!)

If your agency meets **all** of the exemptions below, you do not need your own seller of travel number in California:

Your business model is: Sole Proprietor, single-member LLC, or single-shareholder S Corp.

You have a written contract with a host agency (your host must have a CA SOT).

You are selling through your host, with your host's accreditation number.

You use your host's accreditation for **all** bookings (no booking direct and bypassing the host).

All fees (consultation/service fees) must be processed through the host agency.

Clients must pay the host or supplier directly. (No taking cash. Checks would need to be made out to the host agency.)

You must disclose on every sale that you belong to a host, including the host's name, address, phone number and registration number.

Now, if your agency is located in California, you should also be aware that you also need to participate in the **Travel Consumer Restitution Fund**. It's essentially a fund to help consumers if a seller of travel (agency or supplier) goes out of business.

Florida

A state rich with travel agencies, it's no surprise Florida jumped on the SOT bandwagon. The way Florida's program is structured, it makes sense to break it up into hosted advisors (independent contractors using a host agency) and agencies in general.

Big picture is that any agency that operates out of, or services clients located in, Florida needs to apply for a FL SOT#. There's an asterisk attached to that: Agencies that have been accredited by ARC for 3+ years under the same ownership can file for an exemption. (Note: This is only for ARC accreditation, other accreditations are not listed as exempt.)

Florida also requires that their travel agencies put up a \$25,000 Surety Bond. If you've been in business 5+ years without problems, you can file for a waiver of the bond.

When it comes to independent contractors (ICs) using a host agency, Florida allows you to use your host agency's SOT# for a small fee if you meet the following criteria:

You must be with a host agency that has a FL Seller of Travel number;
AND

Have a written contract with the seller(s) of travel listed above (you'll provide them a copy of the contract); AND

You do not accept fees (service/consultation/etc.), commission or other valuable consideration directly from your clients (they must go through your host agency); AND

You do not have unused ticket stock in your possession; AND

You do not have the ability to issue tickets, lodging or vacation certificates, or any other travel documents.

Hawaii

Like California's SOT setup, Hawaii requires that foreign entity agencies (located outside the state) need to register their business in Hawaii before they can get an SOT#.

Hawaii's SOT program has a few unique quirks. The first being that if your agency is selling stand-alone activities- maybe you have a favorite excursion company you like to use for helicopter tours of the island- you'll need to get an activities desk license.

And the toughest part about complying with Hawaii's SOT law for out of state agencies is that you need to have a trust account set up at a bank . . . located *in Hawaii*. However, if your agency is located in Hawaii and you decided to go with a host agency on the mainland, you can apply for a waiver as long as you're not accepting any of your clients' money directly.

Washington

Washington is similar to Hawaii and California in that they require your business is to be registered with the state. Unlike Hawaii and California though, Washington doesn't require out of state businesses to register in Washington. They're a-okay with you sending over proof of registration in your state.

They don't just break the mold when it comes to registration. Washington requires that if you hold payments for travel for more than 5 days, you'll need to do 1 of 3 things:

Open up a Seller of Travel trust account (business account) at a bank in Washington state.

Purchase a Surety Bond (the size of bond is based on the previous year's sales).

Be a member of good standing in a professional association approved by the Department of Licensing, through which you get both a \$1,000,000 errors and omissions policy and a surety bond of at least \$250,000. (What associations offer that, I honestly have no idea . . .)

While it's technically possible for an IC to use their host agency's Washington SOT#, it's unlikely. Since most ICs have their own brand and aren't able to use their host's brand, Washington's requirement that the IC conducts business under the name of the host agency really throws a wrench in things.

SUPPLEMENTAL RESOURCES



Host Agency Reviews

Article where you can find the most [up-to-date information on seller of travel license pricing](#).



Travel Consumer Restitution Corporation (TCRC)

If you are in California, you should also be aware that you'll also need to participate in the [Travel Consumer Restitution Fund](#).



Seller of Travel Program - State of California Department of Justice
[More information as it relates to sellers of travel in California](#), don't let the legalize scare you. There are thousands of travel advisors living and working in California.



Florida Seller of Travel (SOT) Application
[This is a link to a PDF application.](#)



Hawaii Business Registration
In Hawaii you need to [register your business in Hawaii](#) before applying for your SOT.



Hawaii Seller of Travel (SOT)
Hawaii's SOT program has a few unique quirks. The first being that if your agency is selling stand-alone activities- maybe you have a favorite excursion company you like to use for helicopter tours of the island- you'll need to get an [activities desk license](#).



CHAPTER 5 | Consortia/Co-ops

Licensing/Registration? Check.

Accreditations? Check.

Now let's dig into the big players you should be aware of in the travel space. First up, consortia.

Consortia

Let's start with something that has always confused me. Is it consortia or consortium? I hear people swap them out all the time in the industry! So naturally, I had to look it up after a few years. Perhaps you already knew this, but if you were naive like me, I'd save you some time and tell you consortia is plural and consortium is singular.

GASP!

Oh no, you're thinking. I've been saying consortiums my entire life. Do. Not. Fret.

First of all, it's impressive you use the word consortium enough in your daily life that you would remember this. Secondly, consortiums are an acceptable way to say more than one consortium, it's just that grammar snobs would argue that a Latin plural is not ideal.

Good news though! Thankfully, there aren't many grammar snobs in the travel industry. (Although the person helping me edit this course did correct my previous sentence, advising me that my sentence needed a verb.)

Now that we've got that important factoid out of the way, let's go over the role consortia play in travel.

A consortium is a group of independently accredited agencies that bind together to streamline their agencies. They use their combined buying power to negotiate better deals for their members on commissions, technologies, marketing, etc.

A **consortium** is a group of *independently accredited* agencies that bind together to streamline their agencies. They use their combined buying power to negotiate better deals for their members on commissions, technologies, marketing, etc.

Agencies are typically not allowed dual affiliation into multiple consortia but occasionally you'll see dual affiliation due to acquisitions or other factors.

Here's a list of some of the larger consortia:

- Ensemble Travel Group
- Signature Travel Network
- Travel Leaders Network
- TRAVELSAVERS
- Virtuoso

Chances are nearly 100% that your future agency will belong to a consortium.

For those of you that want to dig in deeper and start to examine the nuances of the different organizations, you can find an complete list of travel consortiums, reviews and program details in the supplemental resources at the end of this chapter.

Co-ops

You're gonna ace this section because it's pretty darn easy to remember.

In the travel world, a co-op is a consortium that is run by its members and shares any year end profits with members. Simple as that.

In the travel world, a **co-op** is a consortium that is run by its members and shares any year end profits with members.

There are four co-op consortia in the travel industry:

- Ensemble Travel Group
- MAST
- Signature Travel Network
- WESTA

SUPPLEMENTAL RESOURCES



Host Agency Reviews

A [complete list of travel consortiums](#), reviews and program details.

ASTA CONSORTIA DIRECTORY

ABC GLOBAL SERVICES / CCRA | bizdev@ABCGlobalServices.com | www.ABCGlobalServices.com

The ABC-CCRA Premier Global Hotel Program is the largest hotel program in the industry with over 53,000 hotels, 756 chains and thousands of independent properties. Nearly 30,000 hotels offer a discount of up to 40% off BAR, when booking the ABC-CCRA rate codes. The program offers numerous other benefits including Premier Privileges, our corporate VIP program, with exclusive amenities at over 1,300 4- and 5-star hotels.



AMERICAN EXPRESS TRAVEL NETWORK | www.americanexpress.com/travel

For over 55 years, the American Express Travel Network has been connecting American Express Card Members with premium agencies that make membership come to life, every day by providing high-touch travel service and tailored experiences. Our strength is in our global partnerships with the most respected brands in hotel, air, cruise, and tour within the travel industry. The Network is committed to helping passionate travelers experience the world while offering the security and stability of American Express.



ENSEMBLE TRAVEL GROUP | membershipinfo@ensembletravel.com | www.joinensemble.com

Established in 1968, Ensemble Travel® Group is a member-owned organization of independent travel agencies in the US and Canada. Through Ensemble's deep partnerships with our preferred supplier community, our members enjoy industry-leading profit-sharing, and preferential commissions from the world's leading providers of travel products and services. Ensemble Travel designs unique consumer products; optimizes technology platforms and tools; integrates innovative marketing products, and provides comprehensive training and networking to support our members' growth. As an organization, we are focused on collaborating with our membership to deliver tools and services that support their clients' authentic experiences with exclusive benefits that will inspire their passion for travel.



HICKORY GLOBAL PARTNERS | partnercare@hickoryglobalpartners.com | www.hickoryglobalpartners.com

For over 40 years, Hickory Global Partners has been the go-to industry-leading global alliance for corporate travel agencies, corporate travel departments (CTDs) and corporations. HICKORY delivers unmatched negotiated discounts and commissions, resources, support and value that significantly benefits our members, and ultimately, their clients, through its visionary hotel program, robust commissionable air program, one-of-a-kind ground transportation program and comprehensive ancillary portfolio.



LEISURE TRAVEL ALLIANCE | info@leisuretravelalliance.com | www.leisuretravelalliance.com

Leisure Travel Alliance (LTA) is a traditional travel agency consortium and travel marketing organization based in Texas. We provide preferred supplier and database marketing programs to high-volume, mid-volume and smaller volume travel agencies. LTA's network-funded consumer marketing program is one of the most efficient and successful in the industry; and, we do all the work for you. We also offer an alternate host agency booking channel. Please feel free to contact us for additional information.



MAST TRAVEL NETWORK | info@mvptravel.com | www.mvptravel.com

MAST is a travel agency network with over 220 agency members throughout North America, primarily in the Midwest. Member-owned and driven, MAST is the strongest marketing alliance in the Midwest region, providing programs and services that result in increased sales, greater profitability, and mutually beneficial relationships for members and suppliers alike. MAST proudly supports ASTA's advocacy work and is pleased to have 100% ASTA membership within the MAST network. Contact us for more details!



NEST | info@jointhenest.com | www.jointhenest.com

The Network of Entrepreneurs Selling Travel (NEST) is the industry's first and only marketing group exclusively for independent home-based travel advisors. The company focuses on helping home-based advisors achieve greater success financially, professionally and personally by championing solutions and opportunities just for them. From supplier negotiations to marketing, education to networking, and a portfolio of technology solutions, NEST delivers what home-based advisors need, when they need it. NEST is part of American Marketing Group, Inc. (AMG).



SIGNATURE TRAVEL NETWORK

membership@signaturetravelnetwork.com | www.JoinSignatureTravelNetwork.com

Signature Travel Network® is a member-owned, member-directed travel cooperative, comprised of top-tier travel agencies. Established in 1956 it includes more than 600 locations worldwide. Signature's objective is to serve the needs of its members. Signature's technology, marketing, and training programs are designed and customized to meet the unique needs of member agencies. Signature's global partnerships ensure access to the world's finest hotels, resorts, cruises, and land vacations. Signature's member agencies have one common objective: To serve the personal needs of the discerning traveler.



TRAVEL LEADERS NETWORK | info@travelleaders.com | www.TravelLeadersNetwork.com

Travel Leaders Network assists millions of leisure and business travelers annually and is one of the largest sellers of luxury travel, cruises and tours in the travel agency industry, with approximately 5,700 travel agency locations across the United States and Canada. Superior marketing, technology, corporate supplier partnerships and educational specialization programs empower leisure and corporate travel sellers to differentiate and grow their business. Travel Leaders Network offers a proprietary platform for its advisors that annually generates hundreds of thousands of high-quality, new customer leads with extremely high dollar value per transaction. Travel Leaders Network is part of Travel Leaders Group, a division of Internova Travel Group.



TRAVELSAVERS | sales@travelsavers.com | www.travelsavers.com

TRAVELSAVERS is an invitation-only, international travel marketing organization with a retail chain of more than 2,500 independently owned, full-service travel agencies in over 35 countries. Offering a comprehensive range of products and support services to help its licensed agencies maximize sales through a select group of suppliers, TRAVELSAVERS agencies stand out as travel leaders in their local communities. The marketing company also features a unique exclusive territory system based on populations of 50,000, so agency owners maintain control over clients and prospective leads in their exclusive area. TRAVELSAVERS is part of American Marketing Group, Inc. (AMG), essential business partners for the travel advisor community.



VIRTUOSO | help@virtuoso.com | www.virtuoso.com

Virtuoso is the leading global network of travel agencies specializing in luxury and experiential travel, with 22,000 advisors in 50 countries and \$30 billion in annual sales. Preferred relationships with 2,000 of the world's best hotels, cruise lines, tour operators, and more ensure Virtuoso clients travel in the best possible way. Advisors use personal connections and firsthand knowledge to craft bespoke experiences, utilizing Virtuoso's proprietary programs to provide special values, complimentary perks, rare access, and VIP treatment. Virtuoso advisors are industry specialists and sit on numerous advisory boards for the biggest names in the business.



WESTERN ASSOCIATION OF TRAVEL AGENCIES (WESTA)

josh@westa1.org | www.joinwesta.com

WESTA is the premiere regional agency group serving the Western U.S. marketplace. The organization offers its member agencies an exclusive, regionally-focused supplier group supported by an extensive agent education program, as well as a comprehensive array of on-line and direct mail marketing options powered by state of the industry technologies. WESTA, as a member owned cooperative, passes its profits and backend bonuses back to its member agencies.



ASTA HOST AGENCY DIRECTORY

AAA | travelic@aaacorp.com | AAA.com

AAA is the most trusted name in travel assisting travelers since 1902, so we know what it takes to be successful. AAA is one of the largest, financially secure, and innovative leisure travel organizations in the world. When you join us as a AAA Independent Travel Advisor, you will take advantage of our exclusive benefits and products to your clients through our strategic partners. We offer comprehensive training programs that include live sessions, mentoring and much more. We offer a commission model that is both competitive for those new to the travel industry and supportive of those growing, allowing advisors to achieve higher rewards for their business.



ANDAVO TRAVEL | Kirsten.Little@andavotravel.com | www.andavotravel.com

Andavo Travel is a leisure host agency that supports multiple GDS systems and advisors without GDS experience. On top of that, there are NO start-up fees, competitive commission, payment in full and on-time, access to the acclaimed Virtuoso® network, and 30+ years of experience in the industry. Expect a very high level of advisor support. Our Independent Business Travel advisors benefit from the entire support staff, education, tools, and resources to elevate their business.



ATHOME, HOSTED BY ATLAS TRAVEL | athome.atlastravel.com

ATHome is a training school and host agency division of Atlas Travel & Technology Group with two distinct programs: a comprehensive training for anyone interested in becoming a successful, independent Travel Advisor, and another which is focused on the seasoned Travel Advisor looking for a premier, full-service host program with prestigious suppliers, marketing tools and advanced technology.



AVENUE TWO TRAVEL | info@avenuetwotravel.com | www.avetwohosting.com

At Avenue Two Travel, we are focused on helping our advisors build and grow their travel businesses. Whether you are an established advisor or are new to the industry, we offer flexibility in our onboarding and training to meet you where you are. We've built a community with an award-winning culture, dedication to innovation, and drive for success, and we work together to create incredible travel experiences.



AVOYA TRAVEL | contact@AvoyaNetwork.com | www.AvoyaNetwork.com

Avoya Travel®, an American Express Travel Representative, is a multiple Magellan award winning travel platform, focused on offering customizable solutions to travel agency owners and new travel entrepreneurs to meet the unique needs of their business, including the industry's #1 lead program, elite marketing, innovative technology, agency support, endless professional development opportunities and more. Named Best Host Agency since the Travvy Awards inception, Avoya is committed to supporting and helping travel advisors achieve success.



BROWNELL TRAVEL | kerryd@brownelltravel.com | www.brownellhosting.com

Founded in 1887, Brownell is the oldest and most respected travel firm in North America with a superb reputation among clients, suppliers and media partners. Their standout hosting program began in 1978 as one of the first host agencies in the US, and the first to join Virtuoso (then API). Brownell's Hosting Program is widely recognized for the unparalleled support and business development training they offer to independent luxury travel entrepreneurs. Brownell is intentional about the size of their community to ensure a collective of impassioned entrepreneurs who value collaboration, innovation and gracious engagement with each other and travel suppliers.



BROWNELL
DISCOVER MORE

CADENCE | hello@cadencetravel.com | www.cadencetravel.com

Cadence is dedicated to taking better care of people. With a 25+ year history, a stellar reputation and unrivaled industry status as their foundation, Cadence provides high-touch advisor support, full-service accounting, personalized marketing and creative services, competitive earning potential, and inspiring recognition programs. But more than anything, Cadence fosters an environment that feels like family - with a connected community of elite and experienced travel advisors, and caring support from the best team in travel.

CADENCE®

COASTLINE TRAVEL ADVISORS | lindsay@coastlinetravel.com | www.coastlinetravel.com

Coastline Travel Advisors is a full service luxury host travel agency, with offices throughout the US. Coastline serves the most discerning of travel advisors, and provides the community, support and care in which independent advisors can thrive. Coastline offers a comprehensive air team, virtual assistant, leisure referral team, competitive commission splits, and innovative independent advisor programming.



CONNOISSEUR TRAVEL LTD. | Scott.masciarelli@ctltd.com | www.ctltd.com

Connoisseur Travel is a mid-size, luxury agency founded in 1988, based in Washington, DC. We remain independent and focused on our mission providing excellent service and to upgrade our client's expectations. Our corporate and leisure clients appreciate the benefits and amenities offered through our membership in Signature Travel Network. Connoisseur's independent advisor program allows entrepreneurs an opportunity to expand their business with industry-leading technology, marketing, support and access to robust reporting.



CRUISE PLANNERS - AMERICAN EXPRESS TRAVEL

danhicks@cruiseplanners.com | www.cruiseplannersfranchise.com

Cruise Planners, an American Express Travel Representative, is the nation's largest home-based travel agent franchise network, with over 2,500 franchise owners nationwide who independently book vacation and travel experiences for their clients. Cruise Planners supports its franchise owners with innovative marketing, booking and technology tools, professional development and training with the industry's top executives. Cruise Planners and has been named the No.1 travel franchise by Entrepreneur magazine for 18 consecutive years.



CRUISE.COM | ktodd@cruise.com | www.cruise.com

Members of Cruise.com's Host Agency Program harness our powerful proprietary cruise booking technology, full reporting and group management package plus ongoing complimentary remote or in-house cruise, land and air training. Customer service provided by a dedicated in-house staff. Programs start at just \$29/mo including technology. New to the industry? Join our Certified Travel Specialist Program including CLIA and unlimited training plus full technology for only \$349. Highest commission levels; most programs pay 100% commission.



CRUISEONE / CRUISES INC. / DREAM VACATIONS | recruitment@wth.com

www.sellcruises.com | www.dreamvacationsfranchise.com

Live in a vacation state of mind with Cruises Inc. We have been in business for nearly 40 years as the original work- from-home travel host agency, with an A+ rating from the Better Business Bureau. With innovative anytime training available on-demand and full back office support, we are the premier travel host agency. CruiseOne/Dream Vacations is the top-ranked franchise for veterans and our agents earn 100% of the travel industry's highest-paid commissions.



DEPARTURE LOUNGE | kwaldon@departurelounge.com | www.DepartureLounge.com

Departure Lounge is an Austin-based international luxury host agency and member of Virtuoso. Launched in 2013, Departure Lounge is known for industry-best compensation options, modern technology, fantastic preferred agency supplier programs, and a culture based on kindness and engagement. The agency welcomes both veteran luxury travel advisors and those just starting out who have the criteria to be a good fit for the agency, which has advisors throughout the United States and a growing team in Europe.



DIRECT TRAVEL | jgoldman@dt.com | www.dt.com

Direct Travel is a global travel management company that is committed to a more personalized approach to travel and we are a leading member of Virtuoso, the world's foremost luxury travel network. We value every travel advisor as a member of our family and a vital contributor to our continued success. Discover a world of difference at Direct Travel.



DUGAN'S TRAVELS LLC | help@duganstravels.net | www.travelathome.com

Dugan's Travels was founded in 1997 by Jennifer Dugan, an agent who wanted to create an environment where others could build their own thriving travel businesses outside of the confines of brick and mortar agencies. Jennifer's vision was for agents to exercise their passion and skill for planning travel while still remaining available to their own families and other commitments. Over 20 years later, her small business goal has blossomed into a successful multi-million dollar enterprise that transforms the hobbyist into a travel professional.



FROSCH INTERNATIONAL TRAVEL | entrepreneurs@frosch.com | www.frosch.com

At FROSCH, we aspire to define ourselves by delivering industry-leading expertise and service to our customers. Join our community of passionate individuals. At FROSCH, luxury means more than just the travel we provide. We focus on individual ICs and their achievements as the collective goal and embody our core values: Respect, Integrity, Excellence, Communication, Commitment, and Delivering the Unexpected.



GIFTED TRAVEL NETWORK | joinus@giftedtravelnetwork.com | www.giftedtravelnetwork.com

At GTN, we've created an environment where travel entrepreneurs thrive. We empower our advisors to build their own brand and we have best-in-class services and technology. We offer commission split options up to 100% so that top-producing advisors keep all their commissions. Our Travel MBA program for new advisors is award-winning and our coaching programs help experienced advisors sustain their success. Built on the spirit of community vs competition, GTN puts our members first!



INDEPENDENT BY LIBERTY TRAVEL | sales@independentlt.com | www.independentlt.com

Backed by one of the biggest names in travel, Independent by Liberty Travel delivers the best of both worlds—access to our global partners for extensive resources, exclusive offers, and instant brand recognition, along with the freedom of being an independent business. We help set travel advisors up for success through professionally-guided education programs, easy-to-use online tools, personal support, and automatic client leads of customers already looking to book travel. It's time to let your career take flight, with Independent by Liberty Travel.



INTELETRAVEL | info@inteletravel.com | www.InteleTravel.com

The Original Travel Agency At Home. InteleTravel is the largest and oldest host agency in the world supporting advisors throughout US, Caribbean, Mexico and the UK. InteleTravel owns its technology, including powerful robust booking engines, packaging /marketing /CRM, and the most advanced LMS platform in travel. Offering the highest commissions and most competitive travel product offerings. InteleTravel is a top national account for most major travel brands. Conducting over 35 training events annually, InteleTravel Quest, annual advisor conference, is the largest event in the industry. InteleTravel has a 30-year track record and competitive advantages to drive advisor growth and success.



KHM TRAVEL GROUP | memberships@khmtravel.com | www.khmtravel.com

KHM Travel Group is an award-winning host travel agency, currently supporting over 4,000 independent travel advisors across the United States. With an innovative education and support program, KHM Travel Group works to empower, educate, support, and promote all independent travel advisors in their journeys to build successful businesses. KHM Travel Group's Core Values drive the team's passion for sharing knowledge and helping others experience the world.



LEISURE TRAVEL ALLIANCE CENTRAL | info@ltacentral.com | www.ltacentral.com

Leisure Travel Alliance Central is a host travel agency providing booking and consumer marketing services to experienced travel agents and new entrants. We provide booking access for virtually all reputable travel suppliers including over 50 preferred suppliers of our parent consortium, Austin-based Leisure Travel Alliance. In addition, LTA Central offers new entrant training through its travel school, I.T. Travel Institute of Texas. Please feel free to contact us for additional information.



LEVARTÉ TRAVEL | marketing@levartettravel.com | <https://levartettravel.com>

Levarté Travel's mission is to lift professionals through travel. Our tools and benefits are designed based on our CEO and Founder, Lori Speers, with more than 40 years of experience in the travel industry as an Advisor and leader at other travel companies. Our training and support focus on getting you your first booking for newbies and scaling your business for our industry expert members. Visit our website, levartettravel.com, for our membership levels.



MTRAVEL | ic@mtravel.com | www.mtravel.com

MTravel Hosting Services is an award-winning travel hosting solution for experienced ICs, small agencies and travel entrepreneurs booking leisure, luxury, corporate and group travel. Supported by dedicated account managers providing strategic business coaching and training opportunities, MTravel's innovative IC-centric technology and global buying power leverages the best-in-class products, commissions and marketing partnerships to help IC's grow their business.



NEST Plus | plus.jointhenest.com/get-started | plus.jointhenest.com

NEST Plus – The Plus Advantage for Independent Travel Advisors / NEST Plus is a host agency created by the team at NEST – Network of Entrepreneurs Selling Travel, to service the special needs of U.S. Independent Travel Advisors who are currently active in the travel industry. They say that home is where the heart is! At NEST Plus, we are a place that you can call HOME. Join our family and surround yourself with the support, community and security that has been instilled in our companies for over 50 years!



NEXION® TRAVEL GROUP | sales@nexion.com | www.nexion.com

A fully accredited host travel agency since 1995, Nexion Travel Group provides ticketing, operations and fulfillment support to independent travel advisors coupled with best-in-class tools, technology, marketing, education and support. Backed by Internova Travel Group, Nexion is the complete host travel agency for multi-agent agencies, corporate agencies, experienced advisors and those new to the travel industry. Reimagine your world with Nexion and discover the Nexion difference today!



OASIS TRAVEL NETWORK | sales@oasistravelnetwork.com | www.oasistravelnetwork.com

OASIS Travel Network (OTN) is a Magellan award winning agency that began with a vision of increasing compensation for advisors. OTN became the first host agency with a 100% compensation plan. With over 30 years in the travel industry Lee Smolinski, CEO and Kelly Bergin, President of OTN have given agencies and advisors the tools to build their brands and to be successful and survive. Today, OASIS offers every tool that a travel advisor needs to succeed in this competitive industry. OASIS is proud to be the only host agency that provides free ASTA membership to all its members.



PLAZA TRAVEL | info@plazatravel.com | www.plazatravel.com

At Plaza Travel, we don't just welcome you as part of the team, we welcome you as part of the family. Owned and operated since 1985 by the Orens family, the agency supports independent travel consultants specializing in leisure, corporate, production and entertainment. Known as a leading agency in the industry, we offer the best benefits, services, and technology to our members. We are a perfect fit for both new-to-industry and well established advisors in travel.



THE TRAVEL SOCIETY | info@travelsociety.com | www.travelsociety.com

Founded in 1986, The Travel Society is the leader of hosting Independent Travel Professionals. 100% Independent Travel Advisor Programs where focus on Independence, Support and Community is the foundation of our culture. Virtuoso Affiliation and Own Key Vendor Preferred Programs offering high commission rates. Flexible Pricing Plans. Own Airline Contracts enabling you to keep 100% of up-front commissions. Full service agency catering to more than 170 Independent Travel Advisors and Travel Agencies across 34 states and international countries.



TRAVEL EXPERTS, INC. | info@travexperts.travel | www.independenttravelprofessionals.com

Travel Experts, Inc. was established in 1989 as a pioneering host agency, designed to support and promote the businesses of independent travel consultants around the country. Travel Experts is also a proud member of Virtuoso, giving their travel consultants access to exclusive, added-value arrangements with top travel providers. For more information, call 800-274-2544 or contact Travel Experts via email at info@travexperts.travel. Further details about Travel Experts are also available on the web at <http://www.travel-xperts.com/>.



TRAVEL PLANNERS INTERNATIONAL, INC. | join@tpionline.com | www.travelplannersinternational.com

At Travel Planners International we alleviate the frustrations of running today's travel agency business. We provide sales, marketing and back office support for those hard driving, business driven, sleep deprived travel professionals that are changing the world, one unique vacation at a time. We're completely obsessed with guiding and promoting the more than 4,100 travel advisors and 300+ preferred travel suppliers that have partnered with us – and we're good looking too!



TRAVEL QUEST NETWORK | support@travelquestnetwork.com | www.travelquestnetwork.com

Travel Quest Network is America's premier platform for starting and growing a travel business, with more agents choosing Travel Quest Network over the last two years than any other host agency. Join 2,500+ agents across all 50 states, and get the best commissions, exclusive deals, robust education, and Legendary Support™ from our world class member success team backing you up every step of the way. Build the future of your dreams.

**TRAVEL QUEST
NETWORK**

TRAVOLOGY HOST TRAVEL AGENCY, INC. | president@travology.com | www.travology.com

The Ultimate host agency partner offering end consumer travel website that beats top retail OTA's and savings to your customer. Offering lead program for experienced agents and "earn while you learn" program for new agents. Offering net rate contracts to earn before your client travels. Unique culture, recognition and rewards plus attend special Travology FAM trips. Special discount code to get started by sending interest email.



UNIGLOBE TRAVEL CENTER | utcinfo@uniglobetravel.com | www.uniglobetravelcenter.com

Uniglobe Travel Center, a proud member of Virtuoso, has been a respected name in the travel industry for over 25 years and offers a variety of programs to support your independent travel business, all of which provide top-tier commissions and sales and marketing development to help you grow to the next level. We partner with both veteran and new travel advisors and empower them to be the most productive in the industry through a relationship built on support and personalized service.



VALERIE WILSON TRAVEL, A FROSCH COMPANY

entrepneuers@vwti.com | www.ValerieWilsonTravel.com

VWT is an award-winning travel management firm and industry leader with offices across the U. S., servicing Corporate, Leisure, and Meetings, Incentives & Fulfillment clients. Headquartered in New York, NY, VWT was originally founded by Valerie Ann Wilson, Chairman & CEO in 1981, and is managed along with her two daughters, Co-Presidents Jennifer Wilson-Buttigieg and Kimberly Wilson Wetty, and COO, Brian Buttigieg. All VWT locations are proud members of Virtuoso® - the travel industry's leading luxury network.



WORLDTRAVELSERVICE | info@worldtravelservice.com | www.worldtravelservice.com/affiliate

Become a Partner and You Become So Much More. Whether you're an independent agent or run your own travel agency, we invite you to grow with WorldTravelService® through our affiliate services. If you are an independent agent looking to grow your career, or an agency owner considering a merger or sale (or something in between), there are many benefits to becoming a WorldTravelService® affiliate. For additional information visit www.worldtravelservice.com/affiliate. WorldTravelService® is looking for established agents and agencies in the DC, Maryland, Virginia, West Virginia, Delaware, Pennsylvania, and southern New Jersey areas to join our network. If you have an active client list and are looking for growth opportunities, contact us today at info@worldtravelservice.com.



YOUR TRAVEL CENTER, INC. / MONTECITO VILLAGE TRAVEL | conniem@ytc.com | www.joinytc.com

With over 50 years in the industry and \$250 million in sales, Montecito Village Travel has evolved into a powerful host agency for Independent Contractors and Partner Agencies. Uniquely poised in size and focus to know you personally and to provide you with the tools, services and connections you need, your success is enhanced by access to the newest travel technologies and the benefits of Virtuoso and FROSCH.





CHAPTER 6 | Host Agencies

You've heard the word **host** or **host agency** a few times already in the course. So, what is a host agency? A host agency is a travel agency that allows independent contractor (IC) agencies to use the host agency's accreditation number to make bookings, typically in exchange for a monthly fee or commission split.

A **host agency** is a travel agency that allows independent contractor (IC) agencies to use the host agency's accreditation number to make bookings, typically in exchange for a monthly fee or commission split.

There are hundreds of host agencies across the United States, ranging in size from just a few ICs to thousands of ICs.

So that's the technical definition of a host agency but there's more to it than that. Like the consortia, host agencies were created as a way for agencies to exercise their combined buying power, except host agencies offered something to agencies that consortia cannot.

But let's back up for a second because there's an important piece of information to know before you can truly understand what makes the host agency model unique: Vendor/supplier commissions (more on that in Chapter 8) are often based on the agency's sales volume. The more you sell, the higher your commissions.

As agencies were struggling in the late 1990s and 2000s, some forward-thinking agencies thought, **instead of each of us having (and paying for) our own accreditation numbers, what if we all combined our bookings under one accreditation number so we could reach the highest commission tiers with all our major vendors?** And boom. That's how host agencies were born.

So that was the main pull of host agencies, but over time, they've evolved their offerings, expanding beyond high commissions and shared accreditation.

In many ways, a host agency is very similar to a consortium in that it's a group of agencies that are coming together to create economies of scale. But here are some big differences:

Each consortium member is required to have their own accreditation number; host agency members use the accreditation number of their host agency.

All bookings and commissions go through the host agency before being distributed to members. Consortia do not deal with commissions or bookings for their members.

Consortia often have minimum sale requirements to join; host agencies rarely have sales requirements to join, although they may have annual sales requirements.

Host agencies (and their members, by default) will belong to a consortium; consortia are not members of host agencies.

Host agencies and their ICs will often use their consortium's marketing and technology tools. Some of the larger host agencies have their own proprietary marketing/tech systems.

Host agencies have an independent contractor relationship with their members. Consortia have no employment relationship with their members.

Host agencies are the fastest growing segment of the travel industry distribution channel. Due to the lower barriers to entry, hosts also play a crucial role in bringing in new entrants to the industry.

You can find a complete list of host agencies, reviews and program details on [Host Agency Reviews](#).



American Society of Travel Advisors (ASTA) Member Host Agencies

[ASTA Host Agency Members have distinguished themselves from their competitors by abiding by ASTA's Code of Ethics and supporting the travel advisor distribution channel.](#) A list of these companies can be found on the next two pages.



Professional Association of Travel Host (PATH) Members

[List of host agencies who belong to PATH.](#)



Host Agency Reviews

Another [list of host agencies](#) with links to their websites.



How to Choose a Host Agency

[An article by PATH on some of the ways or questions to ask in order to evaluate and eventually choose a Host Agency.](#)



CHAPTER 7 | Travel Suppliers

Suppliers, or vendors, are an integral part of the travel ecosystem. A supplier can be an airline, cruise line, tour operator, car company, transfer service, hotel, bed and breakfast, excursion or activity provider, even restaurants. The bottom line is that a supplier provides a component of a trip, a product or service, to travelers.

A **supplier** provides a component of a trip, a product or service, to travelers.

And suppliers *love* travel advisors because it's often the distribution channel with the highest margin.

Think about it. Travel advisors are a huge outside sales force suppliers don't have to pay unless a sale is made. The support costs are lower because the advisors are the ones supporting their clients. The suppliers only need to provide support to the travel professionals, who know what they're doing because they book travel day in and day out.

We've now established that suppliers love travel advisors. But we've all been in those unrequited love relationships, haven't we? So how do travel advisors decide which suppliers to fall in love with? Let me set up the scene.

Google "hotel in Paris" and you know that there are a zillion different options that pop up. As a traveler, narrowing down your choices can be time intensive and overwhelming. If you make a poor booking decision or an error, you have only yourself to blame.

Now think about if it was a travel advisor who made a mistake or booked a client in an unsafe Paris hotel. There's the real possibility of negative reviews, money out of pocket to fix the mistake and the potential loss of a client. With so many

options out there, how can travel advisors be confident their clients will have a good experience?

The secret is, they tap into a network of vetted suppliers called *preferred suppliers*. They can also be called preferred partners, preferred vendors – you get the picture.

And that brings me to our next section . . . (how smooth was that?!?)

Preferred Suppliers

Being a travel advisor is about relationships. Advisors have relationships with their clients, but they also have relationships with vendors. And naturally, they're going to prefer some suppliers over others.

While multiple tour operators (we'll get to them soon, I promise) offer vacation packages to Mexico, an advisor might prefer to book with Funjet Vacations because they have a contact in the support center that they enjoy working with. Another advisor might prefer booking with Apple Vacations because they like the ease of booking in the online portal.

These personal preferences down at the advisor level are what I call *informal preferred suppliers*. I call it informal preferred suppliers because the individual advisor is picking their favorite suppliers . . . from a formalized preferred supplier list. That's right, while the *advisor* has their favorite suppliers that focus on certain destinations, the *agency* has a formal preferred supplier list that their advisors should book with.

So, does every agency create their own preferred supplier agreements? Nope. **Most agencies count on their host agency or consortium to negotiate the formal preferred supplier agreements.** The agency then uses that list of preferreds.

Travel consortium network sales are typically in the BILLIONS; host agencies' network sales are usually in the tens or hundreds of millions. You can imagine how those sales make suppliers drool.

So consortia and high volume agencies set up preferred supplier agreements with vendors that effectively say, "We promise to book your product if you promise to treat our clients well and give us and our clients a few perks."

When it comes down to it, travel advisors want to know that the company they book their clients with is going to:

- provide the client with an excellent experience
- possibly add some exclusive value-adds
- work with the agency if the client's experience is less than optimal and
- pay commissions in a timely manner

Preferred supplier agreements cover all of the points above. In fact, preferred supplier agreements can also negotiate lower commission tiers for agencies. What do I mean by that?

Let's say Princess Cruises' base commission structure is 10% for agencies. This means even if you only sell one Princess cruise, you'll make 10% commission on that booking. To earn 11% commission, Princess' standard commission structure requires you sell \$75,000 worth of Princess. If there's a preferred supplier agreement in place, the 11% commission tier might be lowered to \$50,000. See how that works?

You may not be familiar with value-adds so let's walk through that as well. Value-adds are things of value that suppliers will add to the booking. Maybe the supplier agrees to give preferred agencies a free shore excursion if they have clients that book on certain sailings. Or maybe they give free breakfast or valet parking at certain hotels.

While it's not possible for a vendor to give their preferred agencies value-adds on every booking, the supplier and consortium/agency will work out value-adds for certain booking situations.

Now that you have a better idea of what a preferred supplier is and the benefits to both the supplier and the agencies, here's a few examples of consortia's preferred supplier lists:

[Ensemble Travel Group](#)

[Signature Travel Network](#)

[Travel Leaders Network](#)

You may be wondering if agencies ever book outside their preferred suppliers. The answer is yes.

While the preferred supplier lists do a great job of covering destinations worldwide as well as multiple price points, it's impossible for those lists to cover every component of every booking. What's important to know is that **if you do need to book outside your preferred suppliers, you need to do your due diligence and vet the vendor.** Are they reliable and trustworthy? Do they pay commissions in a timely manner? Do the pictures on their website match the reality of the experience/property?

How do you discover those answers? The number one way travel advisors vet non-preferred vendors is asking other travel advisors for recommendations.

Qualifying Suppliers

Just like clients, there are suppliers who understand the value that travel advisors have to offer. Some suppliers have great programs and support for travel advisors, and it's up to you to find these gems and figure out which ones are the best fit for you (and your clients).

Qualifying suppliers is a critical step in planning and booking your client's dream trip. A thorough and thoughtful approach to qualifying suppliers will help you build sustaining relationships with BDMs (Business Development Managers). BDM is the fancy way the industry says sales reps. Or maybe they just wanted an acronym and sales rep was already too short for an acronym? I dunno.

Anyhow, qualifying suppliers is part of what will separate you from humungo online travel agencies (OTAs). Not only that, it will help you cast a wider net of industry networks and hone your expertise.

As with most things, when you take time to do it well up front, it will make your job easier going forward.

Sounds great! So how do you go about doing it? Well, the first step is to take a look at your preferred supplier list. Since there can be multiple vendors that provide similar services, here's a few tips on what to look for in suppliers:

The suppliers' BDMs and reservationists provide great service: Are they responsive to your emails? Do they anticipate your needs when you tour a site? Do they enthusiastically help you accommodate your clients with unanticipated accessibility needs? If all booking is online, is the portal easy to use? Are there people readily available to answer your questions when you're under the wire to get a trip booked? A supplier that provides great service to you will help you provide amazing service to your travelers.

They complement other suppliers you work with: If you're expanding your supplier portfolio, do they complement suppliers you already work with? Do they provide a different price point? Do they reflect the interests of travelers you're trying to appeal to? Since you're trying to hone down a shortlist of preferred suppliers you love and want to work with again, try to find suppliers that don't overlap too much with what you already book.

The commission is favorable to you: Money may not be the end all, be all, but it goes without saying that a supplier's commission level is going to play a big factor on who you favor. Your commission may also be dependent on your host or consortia which brings me to . . .

The supplier is preferred with your host or consortia: This is not a must, but one of the benefits of choosing suppliers that are preferred with your host and/or consortium is that they've already been vetted and have laid a foundation for a strong relationship with the supplier. Suppliers who are preferred among your host or consortia are also likely to offer more marketing support, higher commissions, and better bonuses and/or incentives. Speaking of marketing support . . .

They're active in the travel community: Do you see them at trade shows? Do they offer updated webinars and stay engaged with you? Do they have a Facebook Group for advisors? If they're MIA that could be a red flag.

The supplier helps you with marketing: Suppliers may partner with you, offering dollars (or co-op dollars) you can use to market trips for your clients.

Co-op stands for cooperative dollars and is a partnership between suppliers and agencies to share the cost of advertising at the local level to increase sales.

Those are just a few markers of a supplier that could be a good fit for you. Do they need to check all those boxes? No. But there's a ton of choices out there, and this will help you sort through all your options.

Where to Start Looking for Suppliers

We should talk about what to do if for some reason you're not finding what you need within your consortium or host's preferred supplier list. The travel world is a big place and suppliers aren't exactly unicorns- they're EVERYWHERE. For each itinerary, there's likely dozens of options for the individual components of a trip. Where do you even begin?

There's a few steps you can take to help narrow down your options:

- **Travel advisor FB/social groups:** Why reinvent the wheel when looking for suppliers? Join travel advisor specific Facebook groups (more on those in Chapter 29) to help with your research. A good start is to begin with your host or consortium's Facebook group (if you belong to one), or to start with a travel advisor Facebook group that targets your niche. ASTA has a hopping FB member group called the ASTA Member Lounge which you should join as soon as you join ASTA.

I have provided a resource on some places to plug into to develop a community of travel professionals at the end of this chapter.

- **Trade Shows/ Conferences:** Conferences and trade shows are like speed dating for suppliers: it's a great way to cast a wide net and get a little facetime with a lot of suppliers. These are times when you can have questions answered that you can't find in a brochure or from a call center. Better yet, you can establish stronger relationships with BDMs when you meet them face to face.

Not sure where to start? If you belong to a host or consortium, attending their annual conference is a great first step. ASTA's Global Convention has a robust representation from suppliers (in addition to a ton of educational resources) for newbies.

If you need more choices, you can check out the Host Agency Reviews's travel industry event calendar as well as ASTA's industry calendar for tradeshow, conferences and more.

- **ASTA's Supplier Directory:** There's no better way to find suppliers that support travel advisors than doing a little research on ASTA's Supplier Directory. There you're able to filter suppliers by supplier type and location. It's a great way to familiarize yourself with what's out there to give you an idea of who you want to chat with before you pack your bags to go to your conference.

SUPPLEMENTAL RESOURCES



American Society of Travel Advisors

[Industry and ASTA Chapter Calendar](#)



ASTA's Directory of Travel Suppliers

[Travel supplier who have distinguished themselves from their competitors by abiding by ASTA's Code of Ethics and supporting the travel advisor distribution channel.](#)



ASTA Global Convention

[ASTA's Global Convention](#) has a robust representation from suppliers (in addition to a ton of educational resources) for newbies.



Ensemble Travel Group

More information about [Ensemble Travel Group](#).



Signature Travel Network

More information about [Signature Travel Network](#).



Travel Leaders Network

More information about [Travel Leaders Network](#).



Guide to Building a Work Community

[Step by step guide on how to build to develop a community](#).



Host Agency Reviews

[Travel industry event](#) calendar



CHAPTER 8 | Making Money

I feel like we've been able to get to know each other much better the past few chapters, don't you? Maybe we're even comfortable enough with each other to talk about . . . [*gasp!*] money matters.

How about we start with breaking down the different ways travel agencies make money and then we can talk about salary and earning potential?

As you're getting a lay of the land, one of the most important things to understand is how travel agencies make money. After all, these income streams make your job possible!

PS: I also instruct ASTA's Verified Travel Advisor course on [Finance and Accounting for Travel Agencies](#) so stop by and see me there too!

So, how do travel agencies make money?

Agencies make their money from a variety of different income streams depending on their size, niche and business model. Here's a few of the largest income streams for agencies:

Commissions

Whether you're working at a leisure agency or a corporate agency, chances are the lion's share of the agency's income comes from commissions. I think the easiest way to learn about commissions is to run through the most common questions.

Who pays agencies a commission?

A supplier/vendor— resort, cruise line, airline, hotel, tour operator, etc.— pays commissions to agencies that sell their product.

How do suppliers know they're paying an agency and not just giving a client money back on a booking?

Hopefully you know the answer to this one already. If you're not sure, take a look back at Chapter 3 where we discuss travel agency accreditation numbers.

Why do suppliers pay agencies for bookings?

Suppliers pay a percentage of the sale back to the agency in exchange for the agency making and caring for the booking. Travel agency bookings are, of course, a perk for suppliers. But where travel agencies really shine is the support they provide throughout the entire booking process.

Travel agencies save suppliers quite a bit of money by not only bringing them bookings, but also by servicing those bookings. If there's a problem with the booking, the client calls the agency, not the vendor's support line.

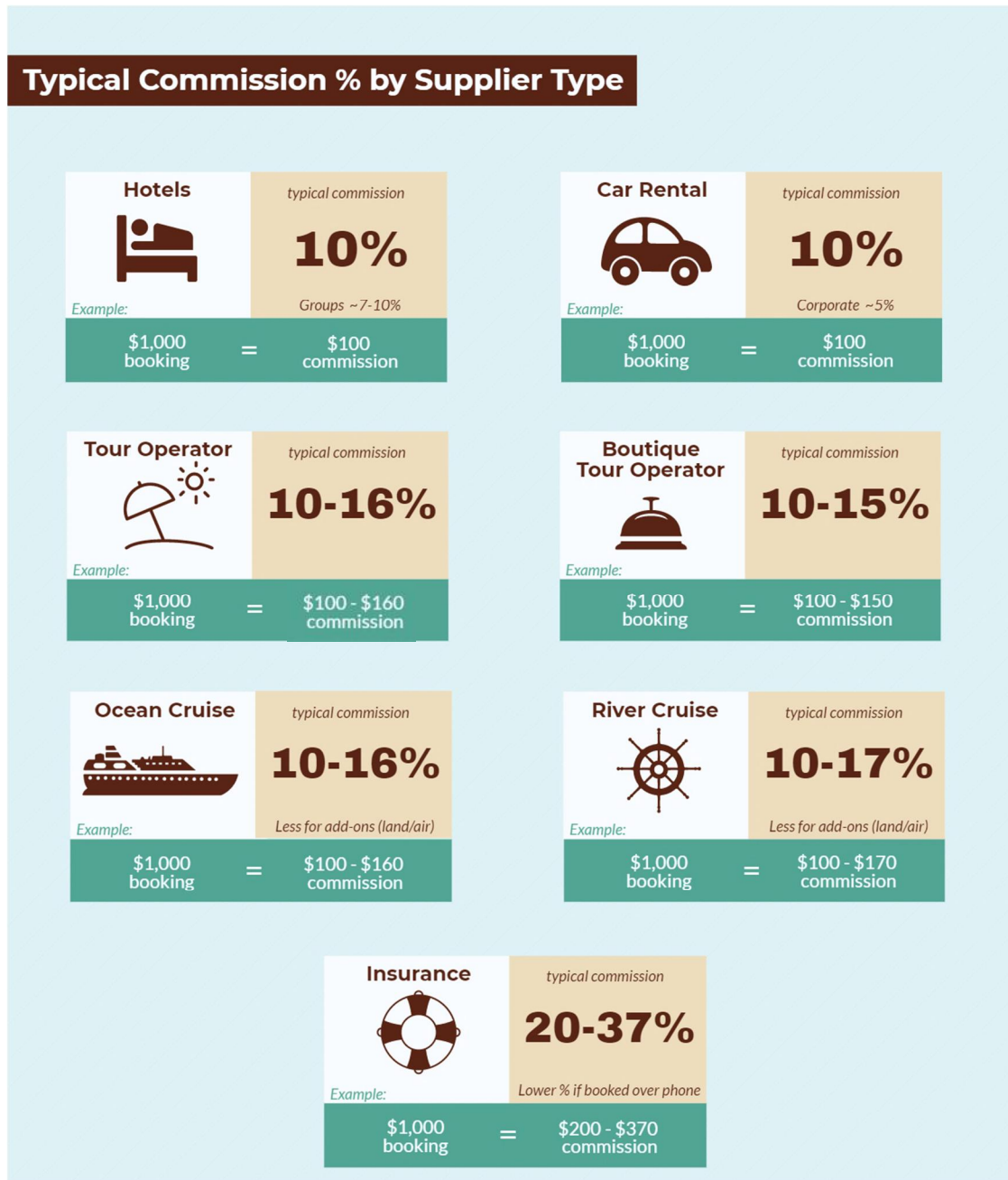
It's for this reason that agencies are like a dream come true for vendors. They have this salesforce they can tap into that vendors only have to pay when the salesforce (agencies) produce sales. Not only that, but the vendors spend a fraction of the cost supporting agencies' bookings because the agencies care for the client, not the vendor's internal support team.

How much commission do agencies earn?

This question gets a little more complicated because there are a variety of factors that come into play when it comes to commissions. Some factors that determine commission level:

- Product being booked
- Agency sales revenue for vendor
- Destination
- Category or class of service
- Private contracts
- How the booking is made (phone vs. online vs. carrier pigeon)
- If the booking is a price match

The infographic is a general guide to commission levels (*keep in mind they can vary agency to agency*):



Side note: if you are employed by a travel agency you are usually paid a salary plus commission. Independent contractors (ICs) are commission only. Using a conservative estimate, booking \$650,000 in travel

business annually comes to a commission income of \$65,000. There are other factors involved. For employed advisors as the commissions in the graphic on the previous page are paid to the agency not directly to the advisor. With ICs there are fees associated with their host agency. But the general income rule of thumb stands.

Do commission levels stay the same?

Nope. Your agency's commission levels will vary from year to year based on your revenue or passenger count with a vendor. Those numbers decide which commission tier you fall under.

Suppliers may also issue bonus commissions throughout the year which can increase an agency's earnings.

What about airline ticket commissions?

I was hoping to slip that by you but you're just way too on top of things!

So, airline commissions don't fit as neatly into a box. The commission range depends on quite a few things, such as: what airline commission contracts you have access to, fare class, airline, date of travel, and city pairs (the cities the traveler is traveling to/from).

Here's a few different places agencies can book air and a rough commission range you can expect with each:

- **Consolidators:** Think of these as airline wholesalers. Consolidators negotiate their own private airline contracts for tickets and then give agencies access to these private fares in their portals. With consolidators, agencies make their money on commissionable tickets or marking up net fares.

Commission ranges for consolidator tickets might be a set range of 5%-25% or the cost of the ticket might have no commission but allow for a mark-up. In this case, it's a great idea to verify what the published rate is and add the mark-up as you see fit.

- **Tour operators or cruise lines:** When a client is booking air as part of a package or with their cruise, there may be some commission available. Depending the volume generated with either cruise lines or

tour operators, the commissions typically begin at 10% and increase to 17% or more depending on the supplier.

- **Through the Global Distribution System (GDS):** The GDS system is something we'll go over in Chapter 23 but what you need to know right now is that it's a tool used mainly by corporate advisors for booking air, car & hotel. Private air commission contracts are typically loaded into the GDS. Host agencies may also offer those private fares through a booking engine that is connected to the GDS. Airline commissions through your GDS might range between 5%-25% varying greatly between domestic and international itineraries.

How are commissions paid?

It depends on your agency's structure.

If you're working with a host agency, the commissions go to the agency on record, which if you remember, would be the host agency since that's the accreditation number the booking was made under. After processing the commissions and taking any commission splits, the host agency will then send the remaining commission to the individual advisor.

If you have your own accreditation number, the commissions are sent directly to your agency.

Do all suppliers pay commissions?

Nope. Sadly, not all suppliers pay commissions. And you will have times when you book your clients with these types of suppliers because that is what is in the best interest of your clients' travel experiences. This is where service fees and consultations fees come into play.

Service Fees

I suppose you're wondering what a service fee is. They're typically a flat fee per transaction/ segment of a trip (i.e., car, rail, air, hotel, change fee, etc.).

Service fees are typically a flat fee per transaction/segment of a trip (i.e., car, rail, air, hotel, change fee, etc.).

Host Agency Reviews does an [annual Fee Report](#) that helps keep tabs on the trends when it comes to agency fee charging habits, both service fees and consultation fees.

In 2019, 64% of independently accredited agencies and 42% of hosted agencies reported charging a service fee. That makes service fees the most common fee type charged by travel agencies. Air tickets- domestic, followed closely by international tickets- are the most common product travel agencies charge a service fee to book. Service fees are also under the advisors' control whereas commissions are controlled by the suppliers.

While exact numbers have yet to come out, polls have shown that COVID-19 has greatly increased the number of advisors that are charging booking fees.

Are service fees making agencies rich? Not quite. At a median rate of \$35 for domestic tickets and \$50 for international tickets, air service fees are just one source of revenue to help agencies stay afloat.

If you're not confident about charging fees and need a pep talk, here's an inspiring story of an [Italy specialist that makes 80% of her income from fees](#). ASTA also provides one of the most popular courses on how to charge services fees. There is a link to the course at the end of this chapter.

Interview with Travel Advisor, Madeline Jhavar

Madeline whose business is focused on Italy, [makes 80% of her income from service fees](#).



Consultation Fees

Again, let's start out with defining what a consultation fee is.

Consultation fees commonly pertain to the time/expertise used to plan, research, or book a trip and/or support clients during their trip.

Consultation fees commonly pertain to the time/expertise used to plan, research, or book a trip and/or support clients during their trip.

The idea of consultation fees wasn't planted in the travel agency community until the commission cuts of the 1990s. Even then, most agencies focused on service fees more than consultation fees, which tends to hold true today.

But as the industry moves to position travel agents from agents to *advisors*, emphasizing the valuable knowledge and skills advisors hold that ensure a smooth trip, consultation fees have steadily gained traction.

Host Agency Reviews started tracking fee trends in 2016, where we noted 10% of hosted advisors reported charging consultation fees. Fast forward to 2020 and the number of hosted agencies charging consultation fees bumped up to 26%. And the number of independent accredited agencies charging consultation fees? A whopping 44%!

The most common consultation fee structure is a flat fee, but agencies also may also charge a per person or hourly consultation fee. And of course, you can use of a variety of compensation structures simultaneously: commissions, service fees, consultation fees, etc.

Did all the stats of the past two sections bring out your data-loving side? You can always find an [archive of fee surveys here](#).

Overrides

When an agency's sales volume starts to reach the tens of millions of dollars, another income stream opens up. Overrides.

I like to think of overrides as bonuses. When the agency meets a predetermined sales goal or moves market share, the vendor compensates them with some extra moola as a *thank you, good job, keep it up!* These overrides can come from

any number of vendors including airlines, GDSs, cruise lines, tour operators, car rental companies, and more.

Other

And our final travel agency income stream, the catch-all bucket of **other** These incomes streams typically don't play a huge role in a travel agency's bottom line, but they are worth mentioning:

- speaking fees
- selling a product or service to consumers or other travel advisors
- signing bonuses

And there we have it, ladies and gents. You now know the secrets of how a travel agency makes money!

Let's dilly dally no longer and jump right into the next section, where we'll cover the earning potential of a travel advisor career.



ASTA's Travel Advisor accounting course
[Finance and Accounting for Travel Agencies](#)



ASTA's Professional Service Fees course
[Whether you call them Professional Fees, Service Fees, Planning Fees or the Travel Excellence Package, fees are a big subject](#), and ASTA lays it all out for you in this very popular course.



Host Agency Reviews
[Annual Service Fee Reports](#) for the years 2016 to 2020.



Audio Series - episode Vol. 8 of *Travel Agent Chatter*
Listen to Madeline Jhawar an [Italy specialist that makes 80% of her income from service fees](#). Madeline discusses in deep sea depth surprising marketing strategies which include focusing her on website development and SEO; relying on fees over travel agency commissions; and her website writing styles. Madeline sells approximately 2 million annually.





CHAPTER 9 | Travel Advisor Income

Okay, so you know how travel advisors can make money, but what does that look like in terms of actual dollars and cents? The number on your 1099 for independent contractors or W-2 for employees is where the rubber really meets the road.

Anytime someone is looking at a new career, one of the first questions that pops up is the earning potential. As usual, there are a whole slew of factors that come into play when it comes to the income of a travel advisor: How much experience do you have? What's your location? What type of travel are you booking? Are you an employee or independent contractor? Do you sell leisure travel or corporate?

Here's a big-picture look and what will influence earnings potential, with sections on different employment models for travel advisors.

Employees

A leisure travel advisor is someone who, you guessed it, books leisure travel. That's your family vacation, cruise, weekend getaways, honeymoons, etc.

It's difficult to find data on *employee* travel advisor salaries. The problem you'll run into is many of the places publishing salary data aren't travel industry specific, they're places like ZipRecruiter or Indeed.com. While they have a large set of salary numbers compiled from all the job postings, they don't understand the nuances of the travel industry.

For example, leisure advisors are typically paid a lower wage than their corporate counterparts and agency managers often have a higher starting salary than a frontline advisor. But you aren't going to find that type of granular data on the Bureau of Labor Statistics (BLS) data or ZipRecruiter.

I give you that preface so that you can look at these numbers with a grain of salt. Plus, we've also got this whole Coronavirus thing that's throwing a wrench in the travel industry, and its effect on advisors' salaries remains to be seen.

Sooooo, the million-dollar question! What's the salary of a leisure travel advisor?

The best data I can give you is this:

The **BLS** stated that in 2019, the mean salary of a travel advisor was \$44,690.

Note: This does not separate out leisure from corporate advisors. The BLS also states that 11% of travel advisors are self-employed, and it's not clear if the self-employed segment was included in their surveys. I would also argue the 11% figure is much lower than reality.

The Travel Institute's 2018 The Changing Face of Travel Agents reported that 37% of employee advisors earned <\$24,000, 45% earned between \$24,000-59,999, and 18% earned over \$60k.

Note: The Travel Institute's audience skew very, very heavily towards leisure.

ASTA's 2018 Travel Landscape research report shows the median pay for storefront advisors as \$36,990 per year.

Corporate Travel Advisors

A corporate travel advisor often works at a travel management company (TMC) and fulfills air/car/hotel bookings for the TMC's corporate clients and their employees. They may also work in-house at a corporation, booking travel for their company's employees.

When it comes to corporate, I'm excited to say that I have some pinpointed sources for you.

Business Travel News's (BTN) 2019 Salary Survey, which focuses solely on corporate advisors working for corporate entities, reported that in 2019, the average salary for a travel advisor was \$69,799. If you move up on the old corporate ladder and upgrade to a manager role, you can expect an average salary of \$144,955.

ASTA's 2014 Labor and Compensation report is older data, but it can give us a stepping off point for salaries of corporate advisors working at TMCs. The average corporate advisor salary reported in 2014 was \$40,677, which is about \$44,638 in 2020 dollars. If you have experience under your belt, bump that up another \$13k.

The general trend in the corporate travel world is that the more air spend the company has, the higher the salaries of their employees.

You might be saying, wait a minute. The salaries are so low. Well, I know many corporate travel advisors who were making per COVID over \$100,000 in combined salary, commission, and fees. So, let's say the more travel you sell the higher your income.

Self-employed Travel Advisors

Finally, this is where we've got some solid data! Host Agency Reviews issues an annual Income Report for self-employed travel advisors. These can be hosted advisors (using a host agency's accreditation number) or independent advisors (have their own accreditation number).

Our latest report looks at income from advisors in 2019 (pre-Covid). Let's go over a few broad strokes from that report.

The first thing to mention is that it's more difficult to nail down an accurate average among self-employed travel advisors since there's so many factors that influence income among this crew.

Here's a few of the biggest influences on income for self-employed advisors:

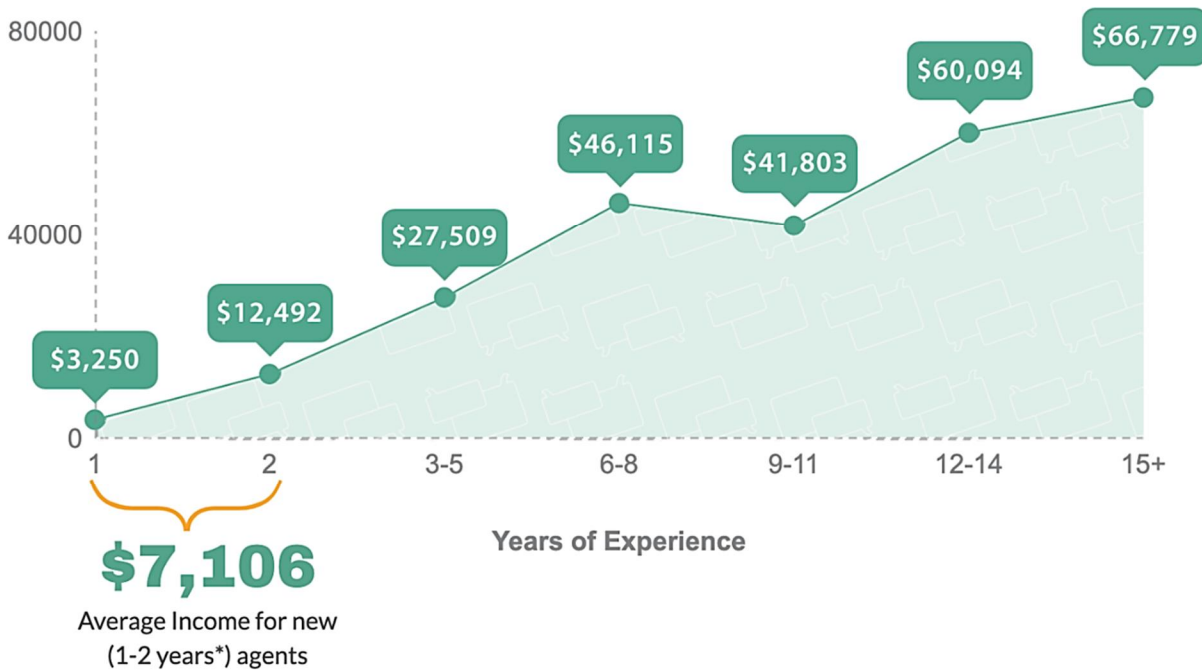
- **Being Hosted vs. Having your own accreditation:** You've learned all about host agencies and having your own accreditation, so those topics are old news by now.

As it turns out, advisors with their own accreditation (we call these folks independent advisors) tend to earn more than hosted advisors. Experienced, full-time hosted advisors earned \$64,377 on average, whereas experienced independent advisors earned \$82,310.

BUT, don't be fooled. This doesn't necessarily mean it's fundamentally better to be independently accredited when you start up. In fact, the majority of self-employed advisors start out hosted.

This brings me to major factor #2 . . .

- **Experience:** Experience plays a huge role in income. As self-employed advisors gain experience, their income increases . . . oftentimes exponentially!



**If an agent had less than 1 year experience, we did not collect income data as it would be incomplete*

FT vs. PT: Maybe it goes without saying, but advisors who sell travel as their primary source of income earn significantly more than those who sell part time or as a hobby.



- **Niche:** Certain travel advisor specialities equate to more income. For the past 3 years, advisors who sold luxury travel reported the highest average income in Host Agency Reviews Income Survey.

One of the unique things about working as a self-employed travel advisor is that your place of residence plays less of a role in your income potential.

Why? Since the majority of travel advisor income stems from supplier commissions, self-employed income is not dependent on your regional cost of living . . . Great if you work in rural MN. Less ideal if you live in NYC

SUPPLEMENTAL RESOURCES



ASTA's Travel Advisor Income Report

[Labor and Compensation Report](#)



Travel Institute Income Report

[The Changing Face of Travel Agents](#)



Business Travel News (BTN) Income Report

[Salary Survey](#)



CHAPTER 10 | Travel Insurance

If you have hawk-like attention to detail, you may have noticed in the commissions graphic that travel insurance commissions are much higher than other suppliers, offering commission levels from (approximately) 20-40%.

Sure, the extra cash is intriguing but higher commissions should not be your main motivator for always offering travel insurance to your leisure clients. Bringing up travel insurance also ensures you are following best practices and fulfilling your duty of care obligation to your client.

Duty of Care

Whoa. What the heck is duty of care? I mean seriously, who says that?!?

I hate to break it to you but it's a common phrase in the travel industry (especially on the corporate side). It's also one that is important for you to know.

Here's the Wikipedia definition: Duty of care is a legal obligation which is imposed on an individual requiring adherence to a standard of reasonable care while performing any acts that could foreseeably harm others

Duty of care is a legal obligation which is imposed on an individual requiring adherence to a standard of reasonable care while performing any acts that could foreseeably harm others.

SNOOZE

Here's what that means when it comes to travel. If you're touting yourself as a travel advisor—especially if you're charging fees to clients in exchange for your knowledge and support—your client should reasonably be able to expect that you're not going to put them in a dangerous situation. And if a dangerous situation comes up, like a hurricane approaching an island where your clients are vacationing, you have a responsibility as their travel advisor to get those clients out of there or make sure they're as safe as possible.

In the corporate world, if political instability leads to a coup and one of your clients has employees on the ground in that destination, it's your responsibility as their TMC (travel management company) to run a report of which employees are where and arrange how to get them safely out the destination ASAP.

So now that we understand more about duty of care, let's jump back into travel insurance.

Best Practices

The first thing to understand is that offering travel insurance is something that every single leisure advisor should be doing.

Offering travel insurance is something that every single leisure advisor should be doing.

But when it comes to corporate travel, offering travel insurance is not the norm. That may seem counterintuitive because duty of care is a *huge* emphasis in the corporate world.

So why don't corporate advisors offer travel insurance to every traveler? There are a few different things that come into play:

Buying blanket travel insurance policies for each traveler is cost prohibitive. Cancelled flights/ delays are often seen as a cost of doing business. As part of their duty of care, some companies may purchase med evacuation insurance for their road warriors on international trips but cancelled/delayed flights happen frequently enough that companies expect them and build them into their travel budget.

Travel policies rarely allow for travel insurance. If the company is paying for all trip expenses, there is no incentive for an employee to add on insurance. After all, it's the company's money on the line if something goes wrong, not the travelers.

All travel insurance policies are under the named insured (the traveler). This is a technicality in the insurance world, but it can cause a logistical nightmare for companies. Since the insurance company's relationship is technically with the named insured/ traveler, that means the insurance reimbursement goes back to the named insured, not the company that paid for the policy.

Corporate agreements may supersede booking terms. Say for instance your corporate client does a significant amount of volume on a shuttle route- that is, short, popular airline routes for business travelers that have frequent and predictable service. They may have negotiated with the airline that all non-refundable fares ticketed on the LGA to DCA (New York to Washington DC) route will be treated as refundable.

Okay, so we've established that it's not the norm for corporate advisors to offer travel insurance. But we know that **if you're a leisure advisor, you should always be offering your clients travel insurance, right?** Right!

Adding this step to your workflow not only safeguards and protects your clients, but it also provides *some* protection to your agency if your client's trip hits some turbulence.

Here's how you can ensure you're as protected as you can be when it comes to offering travel insurance:

Create a Waiver: If a tree falls in the woods and no one is around to hear does it make a sound? Likewise, if you offer your client travel insurance, but they didn't sign a waiver saying they wanted to refuse it, did you really offer it? It's your word against the clients without any documentation.

Moral of the story, create a waiver so when a client declines to purchase travel insurance you have something to fall back on if things go sour.

Repeat after me, “I am a travel advisor, not an insurance broker.” *Offering* is the operative word when it comes to travel insurance. Your role is to offer travel insurance and to document that you did so. Your role is to also inform your clients of the risks of declining travel insurance.

If your client has questions about the product, you should be directing them to the insurance company to ensure they're getting the most accurate and up-to-date information. I mean seriously, you've seen insurance companies' fine print. There's no way for a travel advisor to know that front and back. Send them to the professionals when questions arise!

ASTA's General Counsel Peter Lobasso says it best, *“Most advisors are not insurance experts and should refrain from making any representations as to what situations are — or are not — covered under any particular policy. Those questions should be referred to the insurance provider. Advisors may also wish to consider having their clients sign a waiver where appropriate to the circumstances, for example, where the client chooses to not purchase travel insurance or directs the advisor to make a booking contrary to his/her professional advice and a negative outcome is foreseeable.”*

Taking these steps will help protect your agency, but it's not ironclad. Lobasso cautions, “while waivers, when properly used, can provide an added measure of legal protection, they are by no means a guarantee that the advisor won't be sued should something go wrong.”

And with that uplifting note, we'll move on to something more fun . . . working with clients!

Side note: While the duty of care has been mentioned twice in the course thus far, it really is a HUGE subject. ASTA has provided a supplement reading at the end of this course to farther explain what duty of care is. This section has been written by ASTA's lawyer, so keep that in mind as you read it.



ASTA's Guide to Travel Insurance white paper

Members of ASTA have over 20 resources on selling travel insurance including [this white paper on selling travel](#). ASTA members also have access to hundreds of industry article in the library located on your association website: <https://www.asta.org/>.



CHAPTER 11 | Ins and Outs of working with Clients

The first few chapters of this course focused on building a foundation. The goal is to help you get a big picture view of how the travel industry works. Now it's time to drill down and jump into what travel advisors do and how they do it. **We want you to leave this course knowing what a career in travel is like and what your day-to-day job responsibilities will look like.**

What sets travel advisors apart from online travel agencies (OTAs) like Booking.com and Expedia is their personal destination, supplier and resort knowledge, professionalism and the support offered before, during and after a trip.

This next chapter is about the steps you will take as a travel advisor to ensure not only that your client has a great trip, but that your client is excited to share their experience with you as their travel advisor with others. With that, you are on your way to success in your new role!

Finding Clients

When it comes down to it, a travel advisor position is a sales position. That means that if you're working for an agency, it's very likely they'll expect you to not only be closing the leads they send your way, but that you'll be bringing some new clients in.

One of the easiest ways to bring in new clients is through your existing networks. In the interest of time, we'll give a high-level overview of how you can discover new clients in this section. But, if you're looking for someone to



walk you through how to find new clients using your online and real life networks, take a look at in-depth exercise which is referenced at the end of this chapter.

First things first, let's get a visual on your networks. Social media has made visualizing your network a breeze. All you need to do is download your data from the platform and you'll have a list of your connections!

As you look at your list, you'll start to notice some natural groupings. What unites these groups? *Some examples:*

- » Your children go to school together
- » You went to college together
- » You have a shared hobby such as cooking, quilting, dancing, writing, movies, etc.
- » You work together
- » You are neighbors

Okay, now that you've seen what type of circles you run in, you have a bunch of leads! If your kids are all in school, you know that most of those families are going to be traveling during the summer or during school breaks. Think strategically about how you can help. If the children are the right age for Disney, start studying up on Disney and sharing resources with your group. Educate them on why booking with a travel professional is going to save them a zillion hours of research.

If it's a group with a shared hobby/interest, that's the perfect start for a nice group booking (more on that in Chapter 17). Look into what it would take to set up a group trip to Italy where your group will have private cooking classes, wine tasting and other unique opportunities. Or maybe your ski club wants to spend their winter vacation skiing in the Alps.

On LinkedIn, do you have multiple friends working at a company? They might be able to help you get your foot in the door for booking the company's next incentive trip or their day to day corporate travel. Looking at the job titles of your network can also give you a feel for who may have more disposable income.

Maybe you're totally into genealogy and go gangbusters on the Pinterest genealogy boards. What about creating a guide on how to get the most out of traveling to your country of origin? Brand it to your agency and become the de facto travel advisor of genealogy enthusiasts.

Of course, online networking is not the only way to find clients. Spreading the word to friends and family, alerting your community and church that you're now a travel advisor, hosting armchair travel nights at the community center or local retirement community. These are all tried and true methods of increasing your clients.

No matter which route you take, the key takeaway is that building your book of clients is the key to success for both employees and self-employed advisors.

Qualifying Clients

Woot, woot! You're getting some travel inquiries coming in! There's a mixture of excitement and fear as you take on your first potential clients.

I was woefully ill-prepared for my first client. I normally worked the backend of the agency and one day I somehow ended up on the phone with clients. They were asking about a cruise and luckily, they knew which ship they wanted to sail on. I was so nervous as I was taking their details. What dates did they want to go? Names of passengers? Date of birth? City they'd be flying out of? Did they need a pre/post hotel? Great, I'd get back to them with a quote in just a bit.

Except . . . I forgot to ask what type of cabin they were looking at. Doh.

Learning how to properly qualify a client will make your research much quicker. It will also greatly enhance the experience for your clients. Remember that they're calling you because of your expertise in arranging travel. Repeatedly calling/emailing/texting them questions that should have been asked in the original conversation can really put a dent in your reputation.

Qualifying clients is about knowing who the client is and what type of travel experience they're looking for. They may come into your agency convinced they want an inside cabin for their Alaskan cruise. Their reasoning is that they aren't keen on paying extra money for a balcony when they don't plan on being in

the cabin. After all, they can see the gorgeous views from the deck free of charge.

Is that really what they want? Or are they thinking that because they've never experienced it? The last thing you want is for them to have regrets about this dream trip!

So you start to qualify them. You let them experience the cruise through pictures of your Alaskan cruise. You discuss the joy of waking up slowly and seeing the misty panorama of mountains and/or glaciers from your cruise balcony while sipping your specialty coffee beverage (compliments of the beverage package).

Do they still want their inside cabin? Maybe. But chances are that once they have a better understanding that a balcony cabin is more than just an increased cost, that they see the value and enhanced experience it brings, they may have moved to Team Balcony.

Creating Client Profiles and CRM Documentation

One of the easiest ways to help qualify clients is to make sure they're set up in your customer relationship management (CRM) tool correctly. That's the place where you'd be recording details that help you get a better picture of the traveler.

Setting up your client profiles in your CRM tool might be compared to planning a trip. Except instead of the end destination being a place, it's a satisfied client who trusts your recommendations and is able to relate to every advertising piece you send them.

The first thing to do is look at every contact point with your current and prospective clients as a fact-finding mission (fun!). With each conversation and communication, you are gathering information specific to that one client: their family, traveling companions, budget, when they like to travel, where they want to go, and what their future travel focuses might be.

Never let an interaction end without gathering and recording at least one piece of new information that can give you an up-to-date picture of the traveler's personality and the travel goals they might have.

Documenting this information is equally as important as **gathering** it. After all, it's not going to help anyone if the information is locked in your head when someone else needs to step in and help with the booking. Plus, if you're anything like me, keeping it locked in your head is really a euphemism for **I don't remember.**

Your agency will (hopefully) have the CRM system already set up and ready for you to start plugging in the data.

Every agency will have different information they want their advisors to put in the CRM but here's a feel of some of the data that you might be expected to input:

BASIC INFORMATION

<p>Referred By</p>	<p>Communication Home Phone Cell Phone Preferred form of contact Email Home Work (Ok to send personal emails?) Address Alternative address (<i>Snowbirds?</i>)</p>
<p>Credit Card Info Make sure you're PCI-DSS Compliant (more on that Chapter 12)</p>	<p>Frequent Traveler Numbers</p>
<p>Family Members Relationship to traveler Frequent traveler numbers Primary contact info Nicknames</p>	<p>Important Dates Anniversary Birthday Birth of children Graduations</p>

MARKETING INFORMATION

<p>When They Like to Travel</p> <ul style="list-style-type: none"> Last Minute Special Occasion Any Time Holiday Weekend Good Deals Season 	<p>Where They Like to Travel</p>
<p>Life Stage</p> <ul style="list-style-type: none"> Single-Young Single-Mature Single-Senior Citizen Single-Parent Couple-Young Couple-Mature Family-Young Family-Teens Baby-Booker Gen X Gen Y Gen Z Grandparent Middle Age Retired Semi-Retired Widowed 	<p>Interests</p> <ul style="list-style-type: none"> Adventure Bicycle Boating/Sailing Bridge/Cards Culinary/Wine Culinary Foods Cultural Events Dancing Ecotourism Fishing Gambling Golfing Heritage Hiking/Walking Music Museum Shopping Skiing Snorkeling/Scuba Sailing Spa/Health Sun/Beach Tennis Antiques Art Family Activities Gardening Knitting/Crocheting

	<ul style="list-style-type: none"> Sewing Quilting Horseback Photography Music Rafting Sightseeing Sports Theatre Theme Park Architecture RV/Camping Wildlife Event Train Rock/Mountain Climbing Fitness Safari Religious Adult-Only Villa/Private Homes Whale Watching
<p>Special Needs</p> <ul style="list-style-type: none"> Wheelchair Hearing Visual Autistic Dietary 	<p>Type of Travel</p> <ul style="list-style-type: none"> Cruise Package FIT (Flexible Independent Travel) Tour (Escorted) Tour (Non-Escorted) All-Inclusive Romance/Honeymoon Visit Friends/Relatives Large Ships River Cruises Small Ships Expedition Ships World Cruises Quick Getaways/Short Notice All Land Offers

	Cultural Educational Immersive
Budget Economy Moderate Deluxe Luxury	Client Status Prospect Client Advocate VIP Client First Vacation Referral

RESERVATION HISTORY

Status Active Departed Cancelled	Reservation Cycle Booked Under Deposit Date Deposit was applied Credit card Authorization # Date Final Payment is due Paid in Full Date applied Credit Card Authorization # Returned from Trip Under Consideration Dropped from Consideration
Lead Source Website Referral Church Bulletin Direct Mail Email Campaign	Group Wedding Group Speculation Group Church Group Name of Group
Region of the World Europe Asia Caribbean Mexico	Travel Category Insurance Ocean Cruise River Cruise Tour

Continental US Australia South Pacific Africa Around the World	Rail Hotel Car FIT
Supplier Name Preferred Non-Preferred	Destination
Booking Method Supplier Website Phone GDS	Insurance Quote Sent Purchased Vendor Insurance Insurance Release Form (sent/received)
Resort/Cabin Booked Resort Chain Room Category Booked	Booking Registered for Vendor Rewards Program

I know that looks daunting but keep in mind that this information is what helps a travel agency thrive. When an agency and their advisors truly know a client, they can use that information to strategically market to the client with pieces relevant to their travel needs/habits. That, in turn, leads to better leads and higher close ratios.

So, while the list looks long, keep in mind that this information is gathered over time. When you first interact with a client, you'd be entering in **basic information**. As your relationship develops and you get to know more about the client, you'd start to add **marketing information**, like anniversaries, interests, family members. And it's only once they're ready to make a booking that you will start to add data into the *reservation history*.

Not so bad, right?

Working with Budgets

I get it, money can be a sensitive topic. When it comes to addressing your client's budget for a trip, there's a lot of ways you can go about it. But here's the thing, **you don't want to avoid the question.**

Why? Because if you do you might a.) undersell and lose out on income by assuming your clients didn't want to invest in their trip or b.) put a lot of work in creating a trip that is above a client's budget, giving them sticker shock (and possibly making them run for the hills)

As you settle into your new role as a travel advisor, you'll cobble together a sales style that feels comfortable to you. When it comes to budgets, there are three main approaches advisors take:

The Straight Shooter: You're direct. You don't mince words. You sit down to chat and you say, "What's your price range and what do you want it to include?"+

Pros? You save money and decrease the risk of sticker shock. Cons? It *could* intimidate newer travelers who have no idea what a realistic budget would be.

Investigators: You ask qualifying questions to first get a sense of what you think their budget may be. Maybe you talk about the last trip and how much they spent on it, or maybe you ask what type of hotels they like to stay in.

Pros? No awkward silences or scaring anyone away with the "B Word." Cons? There's still room to get wires crossed on expectations.

The wordsmith: You say budget, but you don't say budget. Wordsmiths use euphemisms such as "what price range are you targeting?"+or "what per person price range are you comfortable with?"+

Pros? It's a middle ground and can ease into the convo. Cons? It's possible you won't come away with a crystal clear understanding of their expectations.

Ultimately, you'll probably use a blend of all of these strategies. There's no right or wrong way. In fact, great advisors adapt their strategy depending on the client.

It's all about where you're most confident and what's most comfortable for your client.

Here's a few other tips when discussing budget:

Qualify Your Client: You know this already, but it's key: If someone is newer to travel they may not know what's included in a budget. Did you mean airfare too? Do they expect all food to be included? Does that include transfers? Make sure you know what your client expects to be included in their budget.

Talk about it on the first date. Awkward, I know. But you want to have a sense of your client's budget before you do any planning.

Don't sell to your own pocketbook: You're not working with *your* budget. Listen objectively to your client so you can provide them with the maximum experience and value for their trip.

Don't assume a repeat client will have the same budget when they book again: Always ask about a budget. With returning clients, it may be easier (and take less investigating), but you still want to ask. After all, a typically moderate-budget client might want something more luxury-oriented for a special occasion, or who knows, maybe they got a huge promotion since you last booked for them.

Establish a baseline: Establish a minimum budget your client is comfortable with so you know you can spend all of it.

Offer a few itineraries in a client's range (and possibly outside it): Ultimately, sometimes a client doesn't know what's possible. There may be a price point where they get a lot more value if they go 3% over their budget. Offering at least one option for a trip outside their budget exemplifies your value as an advisor and (if they say no) may plant seeds for them to dream bigger.

Talking about budget will come easier with practice and experience. The moral of the story is be sure you know what your client's expectations are. If you're all on the same page, the planning will be more pleasant for everyone.

Charging Fees

Since we're already talking about money, let's throw fees in there! I mean, why not?

Traditionally, travel agencies did not charge fees. However, over the past 3 decades or so, more and more agencies have adopted some kind of a fee model.

HAR does an annual travel advisor fee survey to keep tabs on this trend. Our latest data shows that **52% of hosted agencies and a whopping 75% of independently accredited agencies charged some sort of fee for their services.**

Why the change? Well, in the 1990s, the airline commission cuts hurt agencies' bottom line . . . a lot. Once a travel agency's bread and butter, airlines quickly became unprofitable unless a fee was charged.

Around the same time, agencies were also hit with cruises' non-commissionable fees (NCFs). We'll dive deeper into NCFs in Chapter 14 but NCFs can be summed up as fees (taxes, fees and port charges) that lower the total amount cruise lines pay commission on. So again, agencies' bottom lines were hit.

Non-commissionable fees (NCFs) can be summed up as fees—taxes, fees and port charges—that lower the total amount cruise lines pay commission on.

Some advisors feel uncomfortable charging fees. As you're going through this course, hopefully you're starting to realize the specialized knowledge and skills of a travel advisor. The ability for clients to be able to research and book their own travel *does not* give them the prowess and expertise of a professional travel advisor.

There is a TON of value in the expertise a travel advisor brings to the table and they deserve to be compensated for it.

*There is a TON of value in the expertise
a travel advisor brings to the table and they
deserve to be compensated for it.*

Charging fees goes beyond the deep knowledge and value a travel advisor has. Fees stabilize income, allow advisors to be less dependent on suppliers and offer more control over their earnings.

With COVID, we also learned the vulnerability of commissions. When travelers cancelled (and didn't rebook) trips en masse, travel advisors lost commissions they relied on and worked hard for.

Types of fees

There are two primary types of fees. We chatted on definitions earlier and here's a little refresher:

Service Fees: Typically, flat fees per transaction/ segment of a trip (i.e., car, rail, air, hotel, change fee, etc.).

Here's a few examples of things that advisors may charge a service fee to book:

- Air ticketing
- Tour package
- Cancellation
- Air-inclusive package
- Accommodation Only
- Rail
- Frequent Flyer
- Exchanges
- Car Only
- Cruises
- Ancillary Services
- Refunds
- FIT Segments
- Shore Excursions
- Special Coupons

Consultation Fees: Commonly pertain to time/expertise used to plan, research, or book a trip and/or support clients during their trip.

Here's a few examples of some basic consultation fee types:

Flat Fee: A flat fee is the most popular consultation fee charge by a large margin. It's one standard/blanket fee upfront that covers the research and planning of the

entire trip, regardless of how many people or days the trip is. A flat fee may function as an initiation for a client to render your services in planning a vacation.

Hourly Fee: A charge per hour spent researching, planning, and/or booking a trip. This is probably not a great model if you are a newbie since trip planning may take you a lot longer.

Per Person: This is also self-explanatory and is a great tool if you are booking groups. Some advisors will also charge a per person per day of travel fee.

These are merely the basic types of fees. But there are a whole lotta ways for travel advisors to implement fees. We call this a fee structure. Some advisors may charge for air only. Some may charge only a service fee, some may charge consultation fees and some may charge a combination of both.

Some advisors may charge a fee upfront but apply it to their client's trip to weed out price-shoppers. This is commonly called a plan-to-go fee.

Travel advisors can get really creative with fee structures and vary greatly on how much they charge and what services they charge for. I spoke to an air-only advisor that charges up to \$500 per airline ticket! He also has a handful of clients on a monthly retainer to book their air.

Interview with Travel Advisor, Lary Néron

Lary does not call himself a travel advisor, he calls himself an [airfare consultant, charging up to \\$500 per airline ticket](#).



What it comes down to is that fees are a way to express value for your time and expertise.

The beauty of fees is that it's a revenue stream you have complete control over. It's money into your bank account now (no thumb-twiddling until your client gets

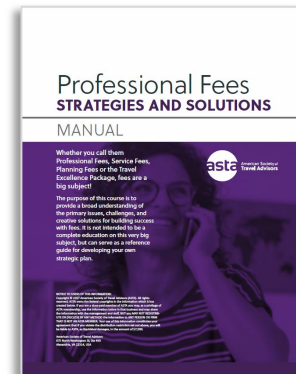
back from their trip a year or more later) and it helps stabilize the bottom line when it comes to your income.

If you're still feeling shaky about charging fees because you're a new advisor (you may not have a choice if that's your agency's policy), I have a few suggestions to help boost your confidence. After all, if you're unsure you're worth the fee, it's awfully hard to sell yourself to clients!

Here's a few resources to help you believe in yourself and the value you bring to the table:

[ASTA's Professional Fees - Strategies and Solutions Course](#): A great way to educate yourself on the primary issues, challenges and creative solutions for building success with fees. I've spoken to many advisors that swear by this course.

[Advisor Advice](#): Sometimes it's nice to just hear it straight from people who have been there and learn through their experiences. In this article, advisors dish on the actual verbiage they use to inform clients of fees, as well as provide advice for colleagues hesitant to charge fees.



Communicating with Clients

Each and every one of us has our very own communication style. You might prefer email while others are more than happy to text back and forth with clients. And Chatty McChatters the next desk over may love nothing more than loooooong phone conversations with clients, much to the regret of those around them.

The key to being a good communicator (and thereby a good travel advisor) has nothing to do with your preferred way to communicate or even your writing style (although these certainly help); the key is that you are able to pass along information efficiently, in a way the client clearly understands it.

Some of us retain information better when we see it, while others may find it easier to remember information when they hear it. People digesting information

differently is one of the reasons why it's important for travel advisors to communicate important information to their clients multiple times. The other reason? Because it's important information, silly!

Discovery Phase

Oftentimes a travel advisor will have a phone conversation or video conference as they begin the discovery process with their client. There's a lot of ground to be covered as the advisor tries to find out what exactly the client wants.

After the discovery call, it's important to reiterate to the client what you took away from the conversation and next steps. Your follow-up email doesn't need to regurgitate the conversation word for word or be a transcript of your call (please, no). It can be as simple as,

Hey Sarah!

Thanks for taking the time to talk with me today and giving me the opportunity to work with you on your birthday getaway!

As I mentioned on our call, I think a weekend trip to NYC is going to be the best fit based on what you're looking to do, the timeframe and your budget. I've got a few things I'm tying up this afternoon but I'll be sending over a few options tomorrow for you to look over. Once you've had a chance to glance over them, we can jump on a call and go over any questions!

In the meantime, feel free to reach out if there's anything else on your mind.

Steph

PS: Here's a link to some photos of the place in Grand Central I was telling you about.

And here's a secret, you can even use that email as a template if you didn't want to write out something more customized to each client.

For corporate advisors, the discovery phase is nearly non-existent. Your client calling in typically knows exactly where they're going and when and their corporate travel policy likely dictates the class of service for their flights, acceptable hotels for their stay and more.

Quote Phase

Now that you've done your research and found a few quotes for your clients, it's time to send it off! I recommend sending three quotes: one right on budget, one below and one above. **The most important thing to communicate during this phase is the itinerary, cost and inclusions/exclusions.**

While you can talk this portion over with the client on the phone (which many leisure advisors do simply because there are so many nuances), it's critical to also send this information in writing to avoid any misunderstandings. *Always* send a recap over email so that you and the client can easily reference back to it.

There are a few different options when it comes to how you can send over the itinerary details to your client:

- You can write up a custom email with the information
- Use a travel itinerary building app
- Create your own travel itinerary attachment for the email
- Send over the itinerary via the supplier or GDS

If you choose to send it over via the supplier or GDS, make sure to put in some personal comments or send a follow-up email with more details.

Here's an example:

Hey Sarah!

Great news, the Renaissance Time Square (the hotel with the terrace rooms overlooking Times Square!) had some amazing pricing. I just sent over a few quotes from Delta Vacations with three different options. Let me know if you didn't see it come through.

Just a reminder, we didn't include airport transfers, but all the flights are Comfort+ so you and your girlfriends will have the extra legroom and free spirits on the way there and back.

I have this on hold for you until Thursday. Take a day to look at it and I'll give you a ring after you get off work tomorrow to go over some smaller details.

As always, you know where to find me if you have any questions!
Steph

Do you see what we're doing in these emails/quotes? We're documenting *in writing* the specifics like itinerary details, costs, and repeating what is/isn't included. We're also giving next steps so the client is clear when you'll be reaching out and what the time frame is.

Booking Phase

There will likely be some tweaks and changes to the itinerary as you move through the quote phase with the client but hopefully, you'll move onto the last phase, the booking phase.

When the itinerary is finally perfected, double check the following:

Confirm the names on the documents are the traveler's legal name (as spelled on the valid government-issued form of ID to be used at the airport).

While people call me Steph Lee and I often give that as my name, my legal name is Stephanie Lee. It's my travel advisor's job to remind me that my travel documents need to match what's on the form of ID I plan to use at the airport.

Confirm the traveler's dates of birth are correct.

Confirm the destination, dates of departure, flight times, room categories and car rental dates are correct. Seems silly but there have been many travelers that don't look carefully at their documents until they try to check-in at the airport. As the advisor, it's part of your job to double, triple, even quadruple check that what you're booking is what you've talked about with the client.

There are a few other things you'll want the client to confirm immediately after making the booking. For leisure advisors, having clients sign a waiver helps protect your agency.

Here are a few things you want your clients to sign off that they understand:

For international trips, **Passports** must be valid for at least six months after they return home and have two extra pages.

That they've been offered **travel insurance**.

Children traveling with one parent, or someone who is not a parent/legal guardian, or children traveling in a group may require special documents to travel.

Visas and vaccinations that may be required to enter countries during their travels.

Cancellation and refund policies are something to point out to clients before the sale is made.

(For corporate clients, most of the employees are likely road warriors and the booking process will be more streamlined.)

Not to be a Debbie Downer, but these protections are only as good as your follow-up. If you send out the waiver for the above information but the client never signs it, things can get very problematic when they call you from the airport saying their name is spelled incorrectly on the documents or they didn't know their passport needed to be valid 6 months *after* they return home.

Can you see why it's so important to document that these points have been discussed **and** that the traveler signs something saying those points have been discussed with them and they understand them?

Okay, enough scary stuff. Let's celebrate because you made a sale!

Next up? It's time to write that follow-up email!

Hey Sarah,

I am SO excited about your birthday getaway! I went ahead and made the booking for you and was able to get the entire group seats together -- yay!

You should have received a booking confirmation from Delta Vacations. Let me know if you haven't seen it yet.

Final payment isn't due until August 23rd. I'll drop a note about a week prior to remind everyone. You gals are going to LOVE the action around Times Square. I can't wait to hear which Broadway play you end up going to. Please keep me updated!

In the meantime, any questions at all, don't hesitate to drop a line!

Thank you again for your trust in me. I know this is a special occasion and I'm grateful for your support.
Steph

What did we do here? Once again, confirming with them that they've received the documents instead of assuming. We also mentioned important dates and told them when they could expect to hear from us next.

Another email trick you might employ to make sure the client receives your emails with important information is to ask a question in the email. If they write back, you know they received it. Simple as that.

Documenting Everything

In our CRM section, I stressed the importance of filling out your travelers' profiles in the CRM. That helps the agency market effectively and also makes it easier for others to step in, if needed. What I *didn't* tell you is that the area in the CRM where you record your interactions with clients is equally as important as the marketing/reservation areas. Maybe even more so.

Document. Document. Document.

All your emails/texts/calls with clients should be documented. When you get off the phone with a client, write a quick recap of the things you covered.

End every phone call with verbally confirming the details discussed. Let your client know that you will follow up within a set period of time via email with a recap of your conversation. With that recap, you have essentially documented everything you discussed and now you can enter that email into your CRM. It's like a two-for-one!

In your communications with your client, you should speak in detail about important trip details like: passports, visa information, traveling internationally with minors, along with payment dates and other essential pieces of knowledge specific to the client's trip.

Here's a few other things you want to be sure to discuss and document:

- quoting trips
- booking trips

- deposit and final payment due dates
- trip confirmations
- offering insurance
- follow up flight information
- requests like seat assignments or special dietary needs
- schedule changes
- travel documents
- pre-departure information
- post-departure
- cancellation and refund policies
- welcome home
- birthday wishes
- offers for future trips
- . . . and these are just a few.

The rule of thumb is document EVERYTHING. The thing is, this is not limited to your conversations with the client, but it also expands out to your correspondence with the suppliers and any marketing campaigns you send the client. (Don't worry, marketing campaigns are typically automatically added.)

Your boss, your colleagues, an attorney . . . they should all be able to come back to any traveler's profile and piece together the entire narrative from the first conversation to the last conversation.

Closing the Sale

The art of closing the sale in travel is a bit different than say, selling a refrigerator. Travel is tied to emotions and for most people, refrigerators don't create a wellspring of emotions. Not to say that a nice refrigerator—what, with its extra big veggie bin and space for 5 gallons of milk—doesn't make people drool. But it doesn't.

So, here's the thing. When you first start out, closing the sale may be a bit like wrapping up a first date. How in the world do you gracefully end it?!?

By using the information you've entered into the CRM, of course! (To clarify, use the CRM info to *close the sale*, not to wrap up your next date.)

It just keeps coming back to that CRM, doesn't it?

Okay, so before you make that final pitch to the client where you're hoping to seal the deal, look back into your CRM and review all the conversations and emails. Make notes on the things the client is really looking forward to and jot down why

the traveler made certain decisions. This can help reinforce the excitement (as well as the practical reasons) why taking this trip is a no brainer for them.

Here are a few examples:

A neighbor is driving your client to the airport as a favor. However, they live close to O'Hare airport and he did not want to get up too early.

I have your family on the 10am out of the Chicago O'Hare airport. This will allow Marty time to arrive at your house plenty early without having to get up at 4am to drive you to the airport.

Your client is traveling with two young children and her husband.

Right now, there's plenty of availability on the inbound and outbound flight so we'll be able to seat your entire family together. The non-stop is going to give you more time in-destination and you won't have the hassle of any connections with the kiddos.

Your client loves French wine and food.

The resort has the perfect French restaurant for the two of you to enjoy several times during your stay. Their menu is extensive, and their wine list is top notch. Plus, it is open every night of your stay!

Great Steph, but what if they're still not taking the bait? Good question. It's like the date where the other person just isn't reading the signals. Sometimes you have to make the next move.

The perfect way to close out your itinerary recap and ask for payment might be something like this:

You are flying on American Airlines. Did you want to apply payment for the trip to your AA credit card or maybe a different card that earns you perks? Which do you prefer?

Mary, this is the perfect holiday gift for your family. I can't wait to hear how your kids react. They'll be so excited! Did you have a preference for which

card to put it on? For payment VI, AX and MC are all accepted. Which is best for you?

As you earn your chops, you'll start to have your own approach. Listen to others in your office. If you work remotely, ask to listen in on calls of your colleagues to get ideas of sales techniques. There's no one right method to closing a sale, just the one that is authentic to you.

Keeping Lips Sealed - Confidentially

You don't often think of people's travels as being private. After all, one glance at social media and you'll think it was a requirement that any human being traveling must post a picture (myself included).

While social media is a great place for your clients to broadcast their travel plans to the world (and their experience with you), the decision to disclose their travels is theirs to make, not yours.

So, when you put on your travel advisor cap, remember that your client is trusting you with their travel information and that information should always be kept confidential. Why?

Here's a few examples:

- » Someone is traveling with a person other than their life partner.
- » Someone is traveling to a competitor's HQ for a job interview and doesn't want their current employer to know.
- » A businessperson is looking at acquiring another company and heading out to tour the facility. The entire deal is very closely guarded and under an NDA. [Non-Disclosure Agreement (NDA)]
- » Booking travel for high government personnel or entertainment folks with security teams and other bodyguards.
- » VIP clients may have to travel with bodyguards and travel under tight security protocols. This might include booking the whole floor of a hotel and coordinating with hotels to use special entrances.

- » Someone may have a restraining order against or be stalked by the person calling in.
- » The person is using a phishing scheme to gather information on a corporate account.

There are so many different scenarios where giving out any information on a traveler could have repercussions. If you run into a situation, you're unsure how to handle, seek out your manager and get their advice.

A final note on keeping your lips sealed: Any itinerary information you share with your clients that they might share via social media should never include confirmation numbers, flight numbers, seat numbers, passport numbers, credit card numbers, etc.

Working with Client No-Nos

If your goal is to build your business, build your client list and your professionalism, this is a section that should be top of mind.

Prioritizing commissions. Recommendations you make regarding your clients' travel must be based on what is right for the client, not what brings you the most money. Think of it as your fiduciary duty - your responsibility to act in the best interests of your clients. The fall-out from an unhappy client goes beyond them not returning to book their next trip. An unhappy client tells others. Prioritizing your income results not just in the loss of that client's future travels but the commission from any potential clients they might have referred to you.

Using unvetted suppliers. Making suggestions on destinations or vendors that have not been vetted by you or someone you trust is risky. Clients expect an elevated level of experience when they work with travel advisors. Entrusting your clients to unknown entities has the potential to go wrong in so many ways: poor customer service, bankruptcy, no commission payments, the products being misrepresented or not delivered.

Faking knowledge. When faced with a question from a current or potential client outside of your knowledge scope, don't be afraid to say just that. Be professional and open in your response. No one expects you to know everything. Use the

opportunity to showcase your industry connections to the client. Let them know that while you don't know the answer, you have both colleagues and suppliers that do and you'll get back to them in no time with an answer.

SUPPLEMENTAL RESOURCES



ASTA's Professional Service Fees course

[ASTA's Professional Fees - Strategies and Solutions Course](#): I've spoken to many advisors that swear by this course



Host Agency Reviews

Article on [how to find new clients using your online and real life networks](#)



Host Agency Reviews

Annual [travel advisor service fee survey](#)



Audio Series - episode Vol. 17 of *Travel Agent Chatter*

Listen to Lary Néron an airfare consultant [charges up to \\$500 per airline ticket](#)



Host Agency Reviews

Interview with advisors on how they charge fees - [Advisor Advice](#)



Transportation Security Administration (TSA)

[Flying with REAL ID](#). Beginning October 1, 2021, every air traveler 18 years of age and older will need a REAL ID-compliant driver's license, state-issued enhanced driver's license, or another acceptable form of ID to fly within the United States



CHAPTER 12 | Working with Credit Cards/Personal Information

PCI-DSS Compliance

There are a lot of important things you're tasked with when you become a travel advisor. The first thing that probably comes to your mind is that you have the weight of someone's hard-earned vacation on your shoulder. Or maybe you're in charge of making sure your client makes it to an important business meeting. Either way, your mind most likely doesn't jump to the fact that dealing with a client's credit card information comes with some serious responsibilities.

Of course, it's common sense to keep credit card information private and not post it in public places or pass out flyers with a copy of your credit card around the neighborhood (front and back, of course). But as a trusted travel advisor, you need to do more than not leave credit card numbers lying around. You need to make sure that you're PCI-DSS compliant.

What the heck is that, you ask?

PCI-DSS stands for Payment Card Industry Data Security Standard. A long acronym that's really just saying that you're following the rules the payment card industry has put in place to ensure companies handling credit cards and the personal information of the credit card holder are doing so securely.

Now you're probably wondering what type of things do you need to be PCI-DSS compliant. The PCI Security Standards Council (a fancy name for a council of the major credit card companies) lays out 12 things to be PCI-DSS compliant:

Install and Maintain Firewalls	Your agency needs to have (and maintain) a firewall.
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Proper Password Protections	Sorry, your computer/router/POS (point of sale)/CRM system all need to have strong passwords. That's right, <i>Travel1234</i> is <u>not</u> acceptable. Even if you add an <i>!</i> at the end. But kudos for your enthusiasm.
Protect Cardholder Data	The CC number, address, CVV code and other data needs to be encrypted. Storing credit card info without encryption means anyone could stumble upon it and use it.
Encrypt Transmitted Data	Same goes for data you're sending out. Encrypt it!
Use and Maintain Anti-Virus	Any device that stores or interacts with credit card data needs to have an anti-virus software installed.
Develop and maintain systems and applications	Were you just trying to use outdated operating systems?! Sorry, Fraudsters are smart cookies and are one step ahead of you. All software must be updated regularly.
Restrict Data Access	This one is easy. Those who don't need access to credit card data should not have access to it.
Unique IDs for Access	For those that do need access to cardholder data, each person should have a separate account. No shared logins.
Restrict Physical Access	My idea of copying credit cards onto flyers was passing with flying colors until this one. All your agency's cardholder data needs to be kept in a secure place. Whether it's you writing down a card number (put it in a locked drawer) or you inputting it into a client's online profile, that data shouldn't be accessible to just anybody.
Access Logs	PCI-DSS requires that whenever cardholder data is accessed, it is recorded.
Test for Vulnerabilities	PCI-DSS isn't set it and forget it. You should always do vulnerability testing and scanning of your system.

Maintain an Information Security Policy	Write this stuff down! Create a policy so that all team members know what is expected and how to keep information secure. This goes even if you are a team of one.
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Yeah, I know. You're interested in becoming a travel advisor, not a security engineer. As the advisor, you aren't expected to set up firewalls and security policies, but you are expected to keep your clients' credit card data, passport and other similar client identification data secure.

As the advisor, you aren't expected to set up firewalls and security policies, but you are expected to keep your client's credit card data secure.

So, if you're not expected to be a tech wizard, why did I go so in-depth on the PCI-DSS requirements? Knowledge is power and if you start working at an agency that you don't see following these guidelines, it's important you bring it up to management. It's in the agency's best interest to protect the credit card data because if that data is stolen, they could be held responsible for the data breach, which costs time and money.

Credit Card Fraud

We've covered how to protect your clients' credit card data but now it's time we look at it from the other direction. How to protect yourself from credit card fraud. Travel agencies are a popular target for fraudsters. After all, if you had stolen credit card data, what are some luxuries you would want to buy? Travel is definitely tops on the list.

The one thing to understand about credit card fraud is that it's a moving target. It's a game of cat and mouse. As soon as you protect yourself from one scam, the fraudsters will try to find another way to get around your defenses.

So, while we will cover some common fraud scenarios you should be aware of, a wonderful resource for you to bookmark is the Airline Reporting Corporation's Fraud (ARC) Prevention page. Make sure to sign up for their fraud alerts to keep abreast of what those wily little fraudsters are up to.

The types of fraud we'll go over below are just a few of the many, many schemes fraudsters have cooked up. I highly recommend you read through ARC's fraud schemes page for more examples and familiarize yourself with ARC's Guide to Accepting Credit Card Payments.

Friendly Fraud

There's a few different types of credit card fraud. **The first type is more common in leisure and is referred to as friendly fraud or chargeback fraud.** It's when the credit card holder makes the charge but then initiates a chargeback on fraudulent grounds. It could be because they changed their mind, it could be because they didn't recognize the supplier's name or the charge on their credit card statement, it could be because they wanted a free trip and thought they could game the system, or it could be that they needed to cancel but didn't want to pay the cancellation penalty.

Friendly fraud is when the credit card holder makes the charge but then initiates a chargeback on fraudulent grounds.

Let's run through a few scenarios of friendly fraud you might encounter as a leisure advisor and how to prevent them:

The client takes their trip but does a chargeback on their trip.

Gather evidence showing the client arrived in-destination. This could include contacting vendors for confirmation the client checked in, took transfers and utilized portions of their trip. Look on social media to see if you can take screenshots of pictures/comments placing the client in-destination.

The client books their trip but needs to cancel. They do not want to pay the cancellation penalties, so they do a chargeback.

This is where your stellar documentation comes in handy! The credit card company will need proof that the client was aware of the suppliers' cancellation policies. Compile your screenshots of the invoice clearly stating the cancellation

policy, your email quote going over the cancellation policy, any CRM notes about conversations involving the cancellation policy.

True Fraud

The other type of fraud is **true fraud**. The charge backs are because the credit card/identity was stolen or a career fraudster has found a way to game the system. This is the type of fraud that is a moving target because fraudsters rely on these schemes to make a living. When one avenue is blocked, they're forced to find another way around things or another agency to take advantage of.

True fraud is when charge backs occur because the credit card/identity was stolen or a career fraudster has found a way to game the system.

While friendly fraud is far more common in the leisure space, true fraud occurs at both corporate and leisure agencies.

Like we did before, let's give you a few true fraud scenarios and what you can do to try to prevent them.

A new client calls for a last-minute airline ticket. You book the ticket, they take the flight. Later you discover the flight was booked on a stolen credit card. A chargeback or debit memo is issued for the amount of the flight.

Unfortunately, in these situations there is little you can do post-flight. Your agency will have to pay the chargeback or debit memo (more on debit memos in the next chapter).

The key to these situations is being proactive and making sure you never even book these tickets. There are often red flags that can help you decipher when it's a suspicious booking, so listen to your gut if something doesn't feel right.

The first red flag is whenever a client requests last minute travel, especially a new client, the fraud alarm should be going off in your head. Your agency should have procedures in place with how to deal with last minute bookings but here are some ways to lower the risk to your agency:

- You can simply let the client know you are not able to do bookings this close to departure per agency rules but you'd love to help them on their next trip with a longer lead time.
- You can bring in a manager and have them decide on the booking.
- If the agency gives the go ahead to book the client but you're still getting bad vibes, gather information and see how many red flags pop up so you can report it to a manager. Things to look out for:
 - Is the phone number local?
 - Is the flight to a high risk city? (What determines is a city is high risk is in the supplement reading at the end of the chapter)
 - Is the passenger also the card holder?
 - Is it for international travel?
 - Is the departure date within the next month?
 - Are they calling themselves Dr., Rabbi, or Father?
 - What does the credit card address they gave look like on Google Maps (ex: Is it an empty parking lot?)
 - Call the credit card companies directly to verify the credit card:
 - ✓ American Express (800) 528-2121
 - ✓ MasterCard (800) MC-ASSIST
 - ✓ Discover (800) 347-1111
 - ✓ Visa (800) 847-2750
 - Closely check out the website if they're sending from a business email- clicking links to ensure they're not just superficial.
 - Look at when the business domain was registered.
 - Google the phone number, name and email address to see what pulls up.
 - Is the phone number local? Look it up with WhitePages reverse phone lookup to see if it's a Google Voice or other VOIP phone number.
 - Are they using social engineering to make you feel comfortable? (ex: I'm not able to have you call me back because I'm just out running in Kayhill Park.)

Whenever you're dealing with air tickets, if you believe the client has fraudulent intent or are unsure, reach out to the Airline Reporting Corporation (ARC) fraud team (FIFP@arccorp.com) to report the scheme.

You receive an email from someone claiming to be a new employee of one of your corporate clients. They're looking for flights leaving within the next day or two. This is not normal behavior at this corporation, but the email looks legit.

It's not unheard of for fraudsters to email people from an organization to steal the signature lines to help add validity to their email. An email with the company's signature line is not proof they work for the company.

Look closely at the email address. Oftentimes fraudsters buy similar looking domains in the hopes the advisor doesn't notice the difference

(steph@hostagencyreviews.com and stephanie@hostagencyreviews.com).

If the email does match the domain, be aware that the sender address can be spoofed (faked). If the "new employee" is telling you not to write back but to call instead because they're away from their desk, reply to see if the email bounces. When in doubt, speak to your manager to see what next steps you should take.

The last chapter probably has you scared out of your mind that you're going to end up either accidentally exposing your client's credit card data *or* being a victim of credit card fraud. Take a deep breath. This whole chapter is about making you aware of red flags and how to protect yourself.

I can guarantee you that by reading this chapter and taking it seriously that you are ahead of many others.

Keep your fraud detectors on, document well and you'll be just fine.

SUPPLEMENTAL RESOURCES



PCI Security Standards Council
[12 things to be PCI-DSS compliant](#)



Airline Reporting Corporation (ARC)
[Fraud \(ARC\) Prevention article](#)



Airline Reporting Corporation (ARC)
[Fraud schemes article](#)



Airline Reporting Corporation (ARC)
[Guide to Accepting Credit Card Payments](#)



Airline Reporting Corporation (ARC)
Fraud team email (FIFP@arccorp.com) to report the scheme.



Airline Reporting Corporation (ARC)
[Guide to Accepting Credit Card Payments](#)



Host Agency Reviews
Information on determining if a flight is to a [high risk city](#).



WhitePages
[WhitePagesqreverse phone lookup](#)



CHAPTER 13 | Understanding Air

How hard can air be? You've done it multiple times online. Choose your destination and dates, decide which price makes the most sense, and then put your name and credit card information in. No secret sauce there.

Ahhh.... but there is.

There is so much to understand about booking air. Things like: airline fare rules, classes of service, consolidator fares, weather waivers, itinerary changes, missed connecting flights, award tickets, upgrades and so much more.

Booking air comes with a whole slew of strings attached, like the ones we mentioned above. We all know how unforgiving airlines can be when a consumer needs to make a ticket change. One might think they're kinder to their travel agency partners but that's not typically the case. When you're a travel advisor, airlines are relatively unforgiving when it comes to ticketing errors. And it's not just airlines that are unforgiving, clients aren't too happy when a change fee shows up because their advisors spelled their last name incorrectly.

Our goal in this section isn't to make you an air expert, it's to give you the 35,000-foot view of air ticketing. Like any travel product, it will take you years to know air ticketing front and back. So, let's walk you through a few topics that are important to be aware of.

Fare Types

There are some wild claims out there. *Get 90% off airfare if you join this travel club! Fly Business Class for the price of coach!* Are there really places that have access to these secret fares? Are travel agencies one of those magical places?

Well, answering that comes down to understanding airlines fare types. We can put the types of fares airlines offer into three buckets:

Published fares: Published airfares are available through the airline directly and are also sold through any travel agency- both traditional and online. These help airlines with price integrity.

Private fares: This airline fare type is a carefully managed inventory allocated to air consolidators, travel agencies, and online travel agencies. They can also be specific to corporations for their corporate travel. Private fares generally remain the same price and can be sold anytime up to the advance purchase requirement- sometimes up to 3 days before departure. They are also known as net, wholesale, bulk, or consolidator fares and are typically tied to international flights and/or premium seats.

Opaque fares: This airline fare type is used by the online travel agencies (OTAs). Flights are sold to the public without identifying the airline or flight numbers until after the purchase is complete. Another way OTAs use an opaque fare is by packaging a hotel (or another product) with the air. The client can see the flight details before checkout, but the key is that the traveler is not able to easily figure out what the air is worth vs. what the hotel is worth. It's a mystery. Or opaque.

The one fare type that consumers don't have access to, but that you'll become more familiar with as a travel advisor, is private fares. Whether you work on the leisure or corporate side of the business, private fares are used extensively by advisors. Sometimes the private fares are accessed through an airline consolidator (also called airline wholesaler) and other times the agency may have access to private fares that they, their consortia or their corporate clients may have negotiated with the airlines.

So that brings us back to the original question. Do travel advisors have access to fares 90% off retail? I'd say that's very unlikely. There may be that one in a million situation where the stars aligned but overall, it would be incredibly rare to find fares 90% lower than the published rates.

What about flying business class at coach class prices? I guess that it would be theoretically possible in the right scenario but again, it's misleading. The private fares agencies have access to can save travelers hundreds or even thousands of dollars. However, there are so many variables when it comes to pricing that any

type of blanket statement regarding guaranteed, huge savings on air is deceptive.

Fare Classes

Next up on our itinerary, fare classes!

You've interacted with fare classes if you've booked online, even if you didn't quite know there was a technical term for it. It's the annoying part of the online air checkout process where you see a fare for \$249 and think you scored a sweet deal . . . but then you read the fine print and realize *nothing* is included in that price. No early check-in, no checked bag, no assigned seat. They might very well strap you to the aircraft wing instead of an indoor seat for all you know.

The other problem with those sneaky low-priced tickets is this new fare class is *not changeable*, which is vastly different from *non-refundable*, something we've all come to expect from airlines. The tickets in this fare class cannot be changed. If you end up sick or miss your flight, sorry, game over. No future credit, no putting you on the next flight, no refund . . . you've just donated to the airline.

While the *service* classes are often broken down into things like Economy, Premium Economy, Business, and First Class, you'd notice when searching for airfare online that there are some weird single letters popping up here and there.

Sort flights by: Best match	Basic Economy (most restrictive)	Economy (lowest price)	Requested fare class	First (2-cabin, lowest)
Depart	Arrive	Stops	Duration	
No change fees				
5:50 am	8:49 am	1 stop	4h 59m	
Details				
Seats				
Not available				
	Roundtrip \$196	Roundtrip \$2,334	Roundtrip \$634	
	Select	Select	Select	
6 tickets left at this price				
MileagePlus earnings (each way, per person):				
	Base award miles PQQ PQQ	--	420 2 84	5,765 2 1,153
Minneapolis/St. Paul, MN, US (MSP) to Denver, CO, US (DEN)				
5:50 am - 7:03 am (2h 13m)				
UA 2145 Airbus A319				
Wi-Fi				
50m connection				

Those, my friend, are **fare** classes. And fare classes determine a whole lot about a ticket including: pricing, fare rules, cabin, mileage/segments the traveler can earn and more.

The tricky part about fare classes is that they vary by airlines, which makes it hard to keep track of. I can hardly blame the airlines for wanting to have their own fare class letters but I do blame every single airline for being so predictable and using letters as their fare classes. Have they never heard of emojis? *We'll be putting you in ✨ class today, m'am.* I mean, who wouldn't want sparkle class?

Anyhow, now we know my feelings on that.

The bad news is that each fare class can have up to 32 different categories that break down the rules of that ticket (yeah, that's not a typo unfortunately). Travel advisors look at these categories to understand more about the ticket's regulations. It's essentially the fine print. If you break one of the rules and the airline discovers it, that's when you get a debit memo (more on that soon).

I don't want to scare you but do want you to understand the skill that's involved with truly understanding and booking airfare, especially in the GDS. I'm going to show you a picture of the categories (rules) of a single air ticket. The goal is NOT to scare you away. The idea is that you'll get a feel for the complexity that can be involved with diving deep into airfare.

Before we take off, GDS stands for Global Distribution System and is the computerized network that facilitates transactions between travel service providers like airlines and travel advisors.

Okay, You ready?

Alright . . . here we go!

WestJet (WS) LP7J2LBS YYC to LON

General notes

LOW/OFF-PEAK SEASON ECONOMY OW UNBUNDLED E
FARES
APPLIES FOR ONE WAY FARES
FOR ADULT
RESERVATION BOOKING DESIGNATOR

EXCEPTIONS

CHART 1

FARE IDENTIFIER	LOCATIONS/FLIGHTS	MKTG RBD CXR	NOTE
ANY FARE	EACH FLT SEGMENT.	WS L E R/DA	
ANY FARE	EACH FLT SEGMENT.	WS E NRBD	

Category 1: Eligibility restrictions

VALID FOR ADULT.

Category 2: Day/Time restrictions

INBOUND -
PERMITTED FRI/SAT/SUN ON EACH TRANSATLANTIC SECTOR.
OUTBOUND -
PERMITTED THU/FRI/SAT ON EACH TRANSATLANTIC SECTOR.

Category 3: Seasonal restrictions

OUTBOUND -
PERMITTED 16OCT THROUGH 10DEC OR 08JAN THROUGH 06MAY FOR EACH TRANSATLANTIC SECTOR.
INBOUND -
PERMITTED 16OCT THROUGH 12DEC OR 09JAN THROUGH 16APR FOR EACH TRANSATLANTIC SECTOR.

Category 4: Flight restrictions

THE FARE COMPONENT MUST BE ON
ONE OR MORE OF THE FOLLOWING
ANY WS FLIGHT OPERATED BY WS.

Category 5: Advanced reservation/ticketing restrictions

RESERVATIONS FOR ALL SECTORS ARE REQUIRED AT LEAST 7 DAYS BEFORE DEPARTURE.
WAITLIST AND STANDBY NOT PERMITTED.
TICKETING MUST BE COMPLETED WITHIN 72 HOURS AFTER RESERVATIONS ARE MADE OR AT LEAST 7 DAYS BEFORE DEPARTURE WHICHEVER IS EARLIER.

NOTE -

TEXT BELOW NOT VALIDATED FOR AUTOPRICING

IN THE CASE OF COMBINED FARES OR DIFFERENCES WITH THE FARE RULE SALES RESTRICTIONS OR ADVANCE PURCHASE LAST TICKETING DATE THE MORE RESTRICTIVE TICKETING DEADLINE APPLIES.

TTL SUBJECT TO CHANGE

DUE TO AUTOMATED TICKETING DEADLINE CONTROL DIFFERENCES COULD EXIST BETWEEN THE FARE RULE LAST TICKETING DATE AND THE FLIGHT FIRING GENERATED TICKETING DEADLINE MESSAGE - THE MOST RESTRICTIVE TICKETING DEADLINE APPLIES.

Category 8: Stopover restrictions

1 STOPOVER PERMITTED IN EACH DIRECTION ONLY AT THE GATEWAY IN CANADA.
A STOPOVER MAY NOT EXCEED 7 DAYS.

FOR TICKETS ISSUED ON OR AFTER 03MAR20 UNTIL 31DEC20.NO PENALTY APPLIES IF TICKET IS REISSUED ON OR BEFORE 31DEC21. CHANGES MUST BE MADE 1 DAY BEFORE SCHEDULED DEPARTURE FOR PENALTY FEE TO BE WAIVED. ONE TIME NAME CHANGE IS PERMITTED FOR NO PENALTY IF TICKET IS REISSUED ON OR BEFORE 31DEC21.

CANCELLATIONS

TICKET IS NON-REFUNDABLE IN CASE OF CANCEL/NO-SHOW.

NOTE -

COVID-19 EMERGENCY RULE

FOR TICKETS ISSUED BETWEEN 03MAR20 AND 31DEC20.CANCELLATIONS ARE PERMITTED UP TO 1 DAY BEFORE DEPARTURE DATE IF PASSENGER CANCEL TICKETED FLIGHT GREATER THAN 1 DAYS FROM DEPARTURE UN-USED TICKET CAN BE USED AS A TRAVEL CREDIT FOR A FUTURE FLIGHT. FOR FULL DETAILS ON TRAVEL CREDITS AND TICKET VALIDITY RULES PLEASE VISIT

1/ TRAVEL AGENTS VISIT WESTJETTRAVELAGENTS.COM
2/ PASSENGERS WHO BOOKED DIRECT WITH WS VISIT WESTJET.COM

CHANGES

CHANGES NOT PERMITTED.

NOTE -

NAME CHANGES ARE NOT PERMITTED.

FOR ALL FLIGHTS FULLY MARKETED AND OPERATED BY WESTJET. GUESTS WILL BE PERMITTED TO SELECT AN EARLIER FLIGHT AT THE AIRPORT TO SAME DESTINATION FOR ROUTES YOW/YMQ/YTO AND YTO/YMQ/YOW-NYC AT NO CHARGE. ALL ROUTES ARE SUBJECT TO AVAILABLE SPACE. IF THE GUEST HAS ALREADY CHECKED IN BAGGAGE FOR THE ORIGINAL FLIGHT THEY WILL NOT BE PERMITTED TO CHANGE TO AN EARLIER FLIGHT.

FOR ALL FLIGHTS FULLY MARKETED AND OPERATED BY WESTJET FOR ROUTES YOW/YMQ/YT AND YTO/YMQ.YOW-NYC GUEST MUST PRESENT THEMSELVES AT THE AIRPORT OR BY CALLING WS WITHIN 2 HOURS OF THEIR ORIGINAL SCHEDULED DEPARTURE. GUESTS WILL BE PERMITTED TO TRAVEL ON THE NEXT AVAILABLE FLIGHT TO THEIR ORIGINAL DESTINATION FOR NO CHARGE. ROUTES ARE SUBJECT TO AVAILABLE SPACE. OTHERWISE THE TICKET IS FORFEIT IN CASE OF NO SHOW.

24 HOURS CANCEL PROMISE

RESERVATION CANCELLATIONS ARE PERMITTED FOR NO PENALTY PROVIDED ALL REFUNDS ARE COMPLETED WITHIN 24 HOURS THAT RESERVATIONS ARE MADE. IF THE FLIGHT DEPARTS WITHIN 24 HOURS CANCELLATIONS ARE NOT PERMITTED. CHANGES ARE NOT PERMITTED AT

FOR TICKETS ISSUED ON OR AFTER 03MAR20 UNTIL 31DEC20.NO PENALTY APPLIES IF TICKET IS REISSUED ON OR BEFORE 31DEC21. CHANGES MUST BE MADE 1 DAY BEFORE SCHEDULED DEPARTURE FOR PENALTY FEE TO BE WAIVED. ONE TIME NAME CHANGE IS PERMITTED FOR NO PENALTY IF TICKET IS REISSUED ON OR BEFORE 31DEC21.

CANCELLATIONS

Category 10: Combinability

APPLICABLE ADD-ON CONSTRUCTION IS ADDRESSED IN MISCELLANEOUS PROVISIONS - CATEGORY 23.

END-ON-END

END-ON-END COMBINATIONS PERMITTED. VALIDATE ALL FARE COMPONENTS. TRAVEL MUST BE VIA THE POINT OF COMBINATION. SIDE TRIPS PERMITTED.

PROVIDED -

COMBINATIONS ARE WITH ANY ECONOMY OW UNBUNDLED-TYPE FARES IN RULE EL01 IN TARIFF

IPRAI - BETWEEN THE USA/CANADA-AREA 2/3 VIA ATLANTIC.

OPEN JAWS/ROUND TRIPS/CIRCLE TRIPS

FARES MAY BE COMBINED ON A HALF ROUND TRIP BASIS WITH WS FARES

-TO FORM SINGLE OR DOUBLE OPEN JAWS

-TO FORM ROUND TRIPS

-TO FORM CIRCLE TRIPS

PROVIDED -

COMBINATIONS ARE WITH ANY ECONOMY OW UNBUNDLED-TYPE FARES IN RULE EL01 IN TARIFF

IPRAI - BETWEEN THE USA/CANADA-AREA 2/3 VIA ATLANTIC.

END-ON-END

END-ON-END COMBINATIONS PERMITTED. VALIDATE ALL FARE COMPONENTS. TRAVEL MUST BE VIA THE POINT OF COMBINATION. SIDE TRIPS PERMITTED.

PROVIDED -

COMBINATIONS ARE NOT FOR CARRIER CI/AF/KL/NW/CX/KA/BA/MU/JL/QF/AZ/KE/LY/EK/AM/S4/QR/9W/CZ/AY/PK/CA/FJ/NZ/DE/FI/PR/HU/UN/AT/OZ/LA/4M/LP/XL/4C

COMBINATIONS ARE NOT FOR CARRIER EY/VA/EI/UA

OPEN JAWS/ROUND TRIPS/CIRCLE TRIPS

FARES MAY BE COMBINED ON A HALF ROUND TRIP BASIS WITH WS FARES

-TO FORM SINGLE OR DOUBLE OPEN JAWS

-TO FORM ROUND TRIPS

-TO FORM CIRCLE TRIPS

PROVIDED -

COMBINATIONS ARE WITH ANY ECONOMY OW UNBUNDLED-TYPE FARES IN RULE EL01 IN TARIFF

IPRAI - BETWEEN THE USA/CANADA-AREA 2/3 VIA ATLANTIC.

END-ON-END

END-ON-END COMBINATIONS PERMITTED. VALIDATE ALL FARE COMPONENTS. TRAVEL MUST BE VIA THE POINT OF COMBINATION. SIDE TRIPS PERMITTED.

PROVIDED -

COMBINATIONS ARE NOT FOR CARRIER CI/AF/KL/NW/CX/KA/BA/MU/JL/QF/AZ/KE/LY/EK/AM/S4/QR/9W/CZ/AY/PK/CA/FJ/NZ/DE/FI/PR/HU/UN/AT/OZ/LA/4M/LP/XL/4C

COMBINATIONS ARE NOT FOR CARRIER EY/VA/EI/UA

OPEN JAWS/ROUND TRIPS/CIRCLE TRIPS

FARES MAY BE COMBINED ON A HALF ROUND TRIP BASIS WITH WS FARES

-TO FORM SINGLE OR DOUBLE OPEN JAWS

-TO FORM ROUND TRIPS

-TO FORM CIRCLE TRIPS

PROVIDED -

COMBINATIONS ARE NOT WITH ANY FARE FOR CARRIER CI/AF/KL/NW/CX/KA/BA/MU/JL/QF/AZ/KE/LY/EK/AM/S4/QR/9W/CZ/AY/PK/CA/FJ/NZ/DE/FI/PR/HU/UN/AT/OZ/LA/4M/LP/XL/4C IN ANY RULE AND TARIFF.

COMBINATIONS ARE NOT WITH ANY FARE FOR CARRIER EY/VA/EI/UA IN ANY RULE AND TARIFF.

Category 12: Surcharges

IF INFANT UNDER 02 WITHOUT A SEAT.

THERE IS NO CHARGE FOR TRAVEL PER DIRECTION.

THE PROVISIONS BELOW APPLY ONLY AS FOLLOWS -

TICKETS MUST BE ISSUED ON WS OR HR.

THERE IS NO CHARGE FOR TRAVEL.

OTHERWISE

A SURCHARGE OF USD 265.00 WILL BE ADDED TO THE APPLICABLE FARE FOR TRAVEL FOR ANY SECTOR BETWEEN NORTH AMERICA AND AREA 2.

Category 16: Penalties

FOR TICKETING ON/BEFORE 31DEC 20

CHANGES

ANY TIME

CHANGES PERMITTED FOR REISSUE.

NOTE -

COVID-19 EMERGENCY RULE

NOT PERMITTED ANYTIME.

CANCELLATIONS

TICKET IS NON-REFUNDABLE IN CASE OF CANCEL/NO-SHOW.

NOTE -

TICKET MAY NOT BE APPLIED TOWARDS PURCHASE OF ANY OTHER TICKET. TICKET IS NOT CREDITABLE OR REFUNDABLE AND UNUSED COUPONS HAVE NO RESIDUAL VALUE.

WAIVED FOR THE DEATH OF THE GUEST BOOKED TO TRAVEL OR THE DEATH OF AN IMMEDIATE FAMILY MEMBER OR TRAVEL COMPANION. DOCUMENTATION REQUIRED.

WAIVED IF THE GUEST RECEIVES A JURY DUTY SUMMONS THAT AFFECTS THE DATES OF TRAVEL. DOCUMENTATION REQUIRED.

Category 18: Endorsements

THE ORIGINAL AND THE REISSUED TICKET MUST BE ANNOTATED - NONREF/NOCHGS - AND - NOPRE RSV0SEAT - IN THE ENDORSEMENT BOX.

Category 19: Discounts

UNACCOMPANIED CHILD 8-11 - CHARGE 100 PERCENT OF THE FARE

OR - ACCOMPANIED CHILD 2-11 - CHARGE 100 PERCENT OF THE FARE

OR - INFANT UNDER 2 WITH A SEAT - CHARGE 100 PERCENT OF THE FARE.

INFANT UNDER 2 WITHOUT A SEAT - NO CHARGE

TICKETING CODE - BASE FARE CODE PLUS IN.

Category 31: Voluntary changes

FOR TICKETING ON/BEFORE 31DEC 20

IN THE EVENT OF CHANGES TO TICKETED FLIGHTS

ANYTIME - FOR CHANGES MADE AT LEAST 1 DAY BEFORE DEPARTURE OF FARE COMPONENT MEASURED FROM REISSUE TKT DATE

CERTAIN DOMESTIC REISSUE PROVISIONS MAY BE OVERRIDDEN BY THOSE OF WS INTERNATIONAL FARES

NO CHARGE OR SUM OF FEES OF ALL CHANGED FARE COMPONENTS - DISCOUNTS APPLY - NO FEE FOR INFANTS W/O SEAT AND

REPRICE

A. CHANGED FARE COMPONENTS USE FARES IN EFFECT TODAY

B. ALL OTHERS USE CURRENTLY TKTD FARE

PROVIDED ALL OF THE FOLLOWING CONDITIONS ARE MET-

1. NO CHANGE TO FARE BREAKS UP TO THE FIRST CHANGED FARE COMPONENT
2. FULLY FLOWN FARE NOT REPRICED TO FURTHER POINT
3. WS FARES ARE USED
4. WHEN SAME FARE USED - ALL RULE AND BOOKING CODE PROVISIONS ARE MET EXCEPT ADV RES-TKTG/SALES RESTRICTIONS - OTHERWISE ALL PROVISIONS MUST BE MET
5. ADV RES IS MEASURED FROM REISSUE DATE TO DEPARTURE OF PRICING UNIT

WHEN CHANGE RESULTS IN LOWER FARE REFUND RESIDUAL THEN ADD-COLLECT - REFUND VIA VOUCHER

ENDORSEMENT BOX- HIGHER NON-REF AMT AND NEW ENDORSEMENTS.

IN THE EVENT OF CHANGES TO TICKETED FLIGHTS

ANYTIME WITHIN TKT VALIDITY

CHANGES EXCEPT RBD NOT PERMITTED TO THE FARE COMPONENT-CHARGE HIGHEST FEE OF ALL CHANGED FARE COMPONENTS.

Category 33: Voluntary cancellations

REFER TO PENALTIES CATEGORY 16

Category 50: Application

APPLICATION

AREA

THESE FARES APPLY

BETWEEN CANADA AND EUROPE.

TYPES OF TRANSPORTATION

FARES GOVERNED BY THIS RULE CAN BE USED TO CREATE ONE-WAY/ROUND-TRIP/OPEN-JAW JOURNEYS.

CAPACITY LIMITATIONS

THE CARRIER SHALL LIMIT THE NUMBER OF PASSENGERS CARRIED ON ANY ONE FLIGHT AT FARES GOVERNED BY THIS RULE AND SUCH FARES WILL NOT NECESSARILY BE AVAILABLE ON ALL FLIGHTS. THE NUMBER OF SEATS WHICH THE CARRIER SHALL MAKE AVAILABLE ON A GIVEN FLIGHT WILL BE DETERMINED BY THE CARRIERS BEST JUDGMENT

Did anyone else notice they forgot the period at the end of the last sentence, or was that just me? (Seriously. They did)

It's not all mind-boggling gibberish though! I may be stretching here, but the good news about fare classes is that there's a few of them that are commonly used across carriers:

Y: Full-fare economy class

J: Full-fare business class

F: Full-fare first class

Travel advisors plugged into the GDS or a consolidator have direct access to the airlines' inventory, which allows them to see how many seats are available in each fare class. Having direct access is key because it gives advisors an edge over OTAs, who download the airlines' inventory in the wee morning hours and cache fare information to keep their sites speedy.

Reminder:

OTA is an online travel agency like Expedia

GDS is the Global Distribution System that lets travel advisors book travel.

Of course, the OTAs eventually hit the airlines up to validate the fares (typically when a client is signaling they're ready to buy) but it would cost a lot of money, slow down the site speed and require serious bandwidth if the OTAs were to request real-time data for every single search. (Expedia processes over a million searches a day.)

When agencies are plugged into the airlines' systems through the GDS, the fares are instantly refreshed so advisors see real-time availability. If they see one seat left in Y class, the advisor can grab that seat since they have ~~last seat~~ ^{fast seat} access, which again, OTAs do not. If there was only one Y class seat left, Y class would show as no longer available on an OTA, forcing them to show the next highest fare class, which would be more expensive.

HA! Take that OTAs! Power to the travel agencies! *(Sorry OTAs, nothing personal. I always root for the underdog.)*

Ummmm̄ so yeah. Let's calm down and stay focused, everyone. Here's a screenshot of the GDS showing the fare classes and seats available in each class for flight DLA1423:

```

CARRIER*          27JAN-WE-952A  MSPJFK(MSPNYC)CT ET
MSP ALTERNATE FCM MIC STP/JFK ALTERNATE EWR LGA SWF
1*S#DL1423  J6 C6 D6 I5 Z4 W7 S7 Y9 MSPJFK 1008A 150P   N 221 0E
                B9 M9 H9 Q9 K9 L9 U9 T9 X9 V9 E9
2*S#DL1325  J5 C5 D5 I5 Z3 W9 S9 Y9 MSPJFK  700A1050A   N 717 0E
                B9 M9 H9 Q9 K9 L9 U9 T9 X9 V9 E9
3*S#DL1149  J5 C4 D4 I3 Z2 W9 S9 Y9 MSPJFK  220P 611P   N 717 0E
                B9 M9 H9 Q9 K9 L9 U9 T9 X9 V9 E9
4*S#DL1335  J6 C6 D6 I6 Z5 W9 S9 Y9 MSPJFK  815P1201A#1 9 221 0E
                B9 M9 H9 Q9 K9 L9 U9 T9 X9 V9 E9
>

```

Looks like there is quite a bit of availability on this flight (9+ indicates nine or more seats are open) but if someone is looking for J/C/D/I/Z class tickets, the seats are dwindling down.

Fare classes (and the restrictions that come with them) are important items to discuss with your clients before booking an airline ticket. The rules specific to your client's ticket need not only to be discussed but need to be documented within every email specific to the itinerary prior to issuing the ticket, as well as included in the receipt/itinerary.

So, what's so complicated about fare classes? It's just a lot of information to keep track of. Each airline has their own set of fare classes and rules/ restrictions for each class. For your average consumer (and newbie travel advisor), it's straight up intimidating.

Here's the big picture way I like to look at it. An airline's revenue and pricing department divides up the seats on the plane into those fare classes we just talked about. Let's make up some numbers and say there will be (16) Y seats, (4) J seats, (4) F seats, etc. Their whole goal is to fill up those planes and to get travelers to pay as much as possible for each seat.

Now we know that Y/J/F classes are full-fare classes, meaning that consumers are paying the top dollar for that seat. The airline is feeling pretty darn happy with the revenue from those classes so those seats have the most flexibility and perks. These tickets may be refundable, give you way more bonus miles than a lower

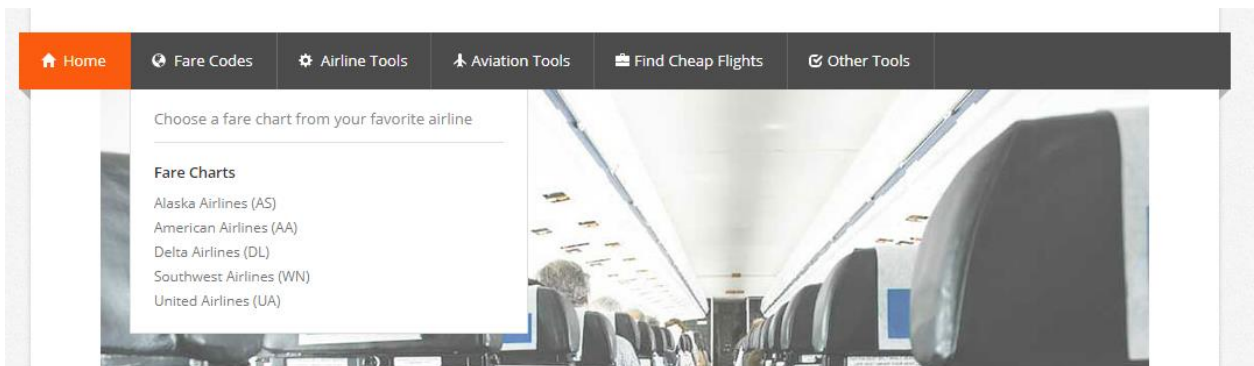
class, and put you at the top of the upgrade list for a higher class of service. You get more, but you pay more.

On the other hand, if you booked an awards ticket, there are only a certain set of classes that will be available to you. What are award tickets? An award ticket is simply a special airline ticket paid with airline miles that the client built up by using an airline branded credit card or from taking previous flights on that carrier. Those types of ticket are often referred to as reward or award tickets. Back to the question, if you booked an awards ticket, there are only a few classes of tickets available. And guess what? It's not those tasty full fare classes, you'd be booking into an awards fare class. Since the airline isn't making money on awards tickets, you aren't getting frequent flier miles for that class and they're certainly not going to be keen on giving you an upgrade to a full-fare business class seat unless they know for certain that seat is not going to sell.

That's big picture fare classes.

While we talked about the more used fare classes, as of 2020, American Airlines has 26 fare classes; Alaska Airlines has 24 fare classes; Delta has 27 fare classes; Southwest has 3 fare classes, United Airlines has 38 fare classes.

If you want to explore more, here's a great website for drilling down into the fare classes of the larger US airlines: <https://www.cwsi.net/>.



Fare Rules

If you aren't familiar with fare classes and their rules/restrictions you're bound to have your clients ask questions like this:

Why do I not get money back from my cancelled airline ticket?

I have to pay a change fee to change the dates/cities on my airline ticket. Why?

What happened? I can't upgrade my ticket with miles. They said it's in the wrong fare class?

What do you mean I can't change my ticket/ get pre-assigned seats/ bring a carry-on because I am booked in a restricted fare?

You're telling me my ticket is not eligible for frequent flier miles? How is that possible?!

Let's run through some of the fare rules that you always want to be aware of when booking air tickets:

- **Non-Refundable Tickets:** Tickets that are exactly that, non-refundable. If your client cannot travel, they will not get their money back, instead they may be given a future travel credit. Refundable fares are available but cost a great deal more than non-refundable tickets.
- **Change Fees:** Once tickets are issued, any changes in the city pairs or the travel dates will more than likely incur a change fee per ticket. The change fee of all tickets are listed in the rules.

Note: This course was written during our favorite pandemic, the Covid-19 pandemic. Due to the world imploding and nothing being certain anymore, most airlines have axed their change fees on North American flights. This may or may not be permanent. Currently, change fees are still in effect for some international flights while other airlines have eliminated change fees for international flights.

- **Non-Upgradable Fares:** Certain fare classes of tickets are not eligible to be upgraded with the traveler's frequent flyer miles by airlines.
 - Ask your client if they are planning to upgrade their ticket with miles. If they are, put the ticket on hold in the fare class necessary for the upgrade and then follow up with the carrier immediately to verify the fare still qualifies.
 - You will also want to make sure that upgrade seats are available. As we saw in the GDS screenshot, each flight only has so many upgradable fare classes.

- **Booking Restricted Fares:** These are the ones that may have you tied to the airplane's wing. Restricted fares are lower in cost but come with strict rules. Rules that potentially will cost the client more in the end than booking a non-restricted fare.
 - **No carry-on bag:** Important to note for the traveler who is in a hurry. If they have to check a bag they will end up at baggage claim, slowing their exit from the airport.
 - **No pre-assigned seats:** This would impact families with children, the person who refuses to sit in a middle seat or the tall person who needs an aisle. If the flight is oversold, travelers who do not have assigned seats will more than likely be the first people bumped from the flight.
 - **No changes or refunds:** A flat tire on the way to the airport, a snowstorm or illness are things none of us plan. But they happen. And if they happen to a client booked on a restricted fare ticket (those ones where they tie you to the airplane's wing), the client needs to be mentally prepared that there is no recourse, changes or refunds.

Now that we've laid some of the potential fare rules and the possible consequences of them, they don't seem as scary, do they? Your clients will feel the same way. You are not there to talk people into something or out of something. You are there to help guide your clients towards a decision that makes sense for their situation and their upcoming trip.

Ticketing Errors

What's a ticketing error? It's the stuff nightmares are made of: booking the wrong days, cities or name spelling.

The good news is, all of these are so very easily avoided through communication and verification. The antidote is to read each line item in your client's itinerary back to them and send them over an email so they can double check. Taking this route means you have two eyes on the itinerary looking for errors and the client now shares any error responsibilities with you.

I'd like a ticket to fly from Springfield to Portland.

Sounds easy enough, right? Easy, yes, as long as you ask which Springfield (MO or IL) and which Portland (OR or ME)!

I'd like to fly on March 10th.

Seems pretty straight forward, yes? As long as you counter it with, Tuesday, March 10th. Always reference not only the date but the day of the week.

I need to be there by Monday, June 15th. I have an early meeting on the 16th.

Again seems simple, but make sure to pay close attention to flights with a connection. Carefully read the arrival/departure date and time.

My ears hurt terribly when we take off and land. I can only fly non-stop.

Non-stop/direct vs. connecting flights might mean the difference between your client having an excruciating flight and an uneventful flight. Make sure to verify that you are booking a flight with no stops*. Keep a watchful eye on schedule changes here as well. If the schedule changes from a direct flight to a connecting flight, you should know your client's needs and reject the schedule change.

**Long haul flights can make a stop for refueling, that does not involve a change in planes.*

I need to travel to NYC.

Many larger cities have multiple airports. Don't forget to ask which airport in NYC they're referring to. Not only that but confirm which one they want to fly into and out of. Also check on the hotel information. If the hotel has an airport shuttle from one airport and you've booked your client out of a different NYC airport, that's a problem. If they're flying into one airport and

out of another, does your client have transportation for both ends of their trip?

Another example is if your client is connecting to a train after their flight arrives. This is a common scenario in Europe. You will want to make sure there is enough time for your client to arrive, get their luggage, get through customs/passport control and transfer to the train station before they need to board the train.

All of these scenarios are avoidable. Again, it's about communicating clearly with your client, sending the itinerary for approval and following up after the ticket is issued with the completed itinerary.

Airline Debit Memos

Debit memos are issued to an agency when tickets run under their ARC number did not follow the specific rules set out by the carrier.

Essentially what happens with a debit memo is the agency gets a memo that says, "you did this wrong and as a result, you owe us (the airline) this much money". If the agency does not pay the debit memo, the agency risks "losing their plates", which is industry-speak for no longer being able to ticket their carrier. Not a big deal if the debit memo is with Air Madagascar; a big deal if the debit memo is from a carrier your agency frequently books.

Debit memos are issued to an agency when tickets run and settled under their ARC number did not follow the specific rules set out by the carrier.

Now that you know debit memos result from an agency not following the rules of a ticket, let's run through some scenarios where debit memos occur.

- Booking more than 9 passengers via your ARC on the exact same flights, same days.
 - *Ten or more passengers from one agency on the same flight is considered a group by the airlines. Groups are ticketed differently than non-group tickets, which breaks the airlines' rules.*

- Group tickets where the fare was incorrectly stored prior to ticketing.
- Refunding a non-refundable ticket.
- Changing a non-changeable ticket.
- Not charging the correct change fee.
- Taking too much commission on a ticket.
 - *A common debit memo that agencies receive is a commission adjustment memo. This is usually issued for one of two reasons: 1) The agency took more commission than the ticket rules allowed. Since the airline already paid out the commission to the agency, the airline is making the agency remedy the situation by paying the airline back the excess commission. 2) Sometimes a commissionable ticket is refunded but the ticketing agency is unaware of it. If this happens, the airlines reach out to the agency and ask for the commission back since the ticket was refunded.*
- Booking hidden cities.
 - *Booking your client to NYC with a stop in Canton, OH, and your client gets off in Canton. You did this because the ticket to NYC was cheaper than just a ticket to Canton.*
- Booking back-to-back tickets.
 - *Back-to-back tickets are similar to hidden city tickets in that the tickets booked aren't reflective of the traveler's true route. We'll get to this soon, but often tickets are cheaper if a Saturday night stay is included. A traveler that only needs to be in a destination Monday-Thursday may book two separate roundtrip tickets with Saturday night stays to access the lower fares. Let's apply it: A traveler books a roundtrip MSP-JFK ticket for Monday-Sunday. They book another roundtrip ticket JFK-MSP departing JFK on Thursday and coming back on Sunday. The traveler only uses the first leg of the MSP-JFK ticket to get to JFK, they then use the first leg of the JFK-MSP ticket to get back home to MSP on Thursday. That is an example of a back-to-back ticket and a big no-no.*

Finding Lower Fares

Airline pricing relies heavily on insane algorithms. The general rule is when the seats start running low, the prices start to rise. Yet even with that, there are still some practices you can implement to try to bring the price tag down for your clients.

While this isn't a sure bet for lower fares, here are a few tricks of the trade to try out:

- **Add a Saturday night stay:** This goes back to the airlines' belief that business travelers, who often have a much bigger wallet than leisure travelers, are less likely to stay over on a Saturday night.
- **Travel during off-peak days:** Tuesday, Wednesday and Saturdays are frequently quieter when it comes to air travel. Fewer passengers and flights don't guarantee lower fares but if your client is flexible, start there first.
- **Plan trips in the slow months:** January, June and September are the months we're all recovering from the holidays or school starting/ending. Traveling during these times can lead to some lower fares.
- **Price out more than one airport.** Obviously, people living in Minneapolis are not going to drive to Chicago to save \$100. However, someone located further from major airports may be willing to drive to a larger airport if it means lower fares. Or someone with 3 airports within driving distance may be open to one further away if it means savings.
- **Be aware of the 7/14/21 advance purchase.** There are a few deadlines of sorts, after which airlines typically raise prices. If you are ticketing 7 days, 14 days or 21 days out, expect a price increase after each deadline passes. If you know the price you quoted will hit one of the deadlines soon, mention to the client prices will be going up after X date.
- **Know thy Fare Rule Category #14 (travel restrictions).** What? You don't know Fare Rule Category 14? (Whew!) If this rule is part of your fare, it means there are restrictions on the ticket. If you're quoting a sale fare, category 14 will tell you the date the sale is valid until. Make sure to let your client know when the sale fare you quoted is expiring.

Last minute tickets can be terribly expensive. In these cases, it's often a good idea to ask your client if they have frequent flier miles. High-cost tickets are a great time to take advantage of frequent flier tickets. If you are going into your client's frequent flier account, always keep that information secure. See *Chapter 12 on PCI-DSS compliance*.

A Note on the GDS

We've mentioned the Global Distribution System (GDS) quite a few times already. What's important for you to know about the GDS is that it's a system where agencies are able to access airline inventories, hotels, and car rentals.

The GDS is a tool used primarily by corporate advisors. Why? Most leisure agencies that book air will do it as part of a package or if it's stand-alone air, they will book it through another channel like an airline consolidator.

Corporate agencies will train new advisors in the GDS system. Leisure agencies may or may not allow new advisors access into the GDS system without prior experience. There are a few reasons for this.

1. **Corporate booking tool.** As I mentioned earlier, the GDS is mainly the playing field of corporate agencies. Leisure agencies focus on training their advisors in the booking tools and portals that are used by leisure advisors.
2. **Debit memos.** Hopefully after reading about debit memos, fare classes, and fare rules, you have a stronger appreciation for the skills an advisor brings to the table.
3. **Learning curve.** In the chapters ahead, we'll have a booking demo of an advisor showing us around the GDS system. Beyond the fare rules and other important pieces of information floating around in travel advisors' heads as they find the best fit for their client, you'll see that using the GDS (especially the "green/blue screen" side) is complex. The green/blue screen side is literally a different language! It takes years of booking in the GDS to become fluent in it and that is why only advisors that need the GDS are trained in it.

In addition to the green/blue screen side, the GDS' have a "pretty" side. It's also known as the GUI (graphical user interface) side. Having a point and click side can make bookings look simple but I would encourage you to remember that a GDS booking is not about a client calling to go from point A to point B and the agency fulfilling it. That's only part of it. A travel advisor knows the fare rules; they inform the client of any visas needed; they keep abreast of what's happening while the traveler is in the air and on the ground.

Other things you should know about the GDS? There are five main GDS systems with Sabre having the largest market share in the US:

- Amadeus
- Apollo
- Galileo
- Sabre
- Worldspan

Travelport is the parent company of Apollo, Worldspan and Galileo. While each GDS has its own language, it is possible for corporate advisors to switch between systems. After all, they know what is possible in the system, they just need to find the way the new system prefers they input it.

As you take this amazing journey to become a travel advisor, you will also become more familiar with PNRs. PNR stands for Passenger Name Record and is a 10-digit number that is automatically generated a booking is made. The PNR is stored within a Computer Reservation System (GDS) alongside a range of information about the passenger including the itinerary and other personal information. The essential information that is added to the PNR is the passenger name as it appears on their government issued identification, contact information of the travel advisor placing the booking, ticket details and at least one portion of the itinerary. The PNR record can also include contact information, frequent flyer information, seating assignment, SSR (another term for you, Special Service Request), fare, taxes, payment method and any vendor remarks.

After terrorist attacks in New York and Madrid, governments around the world determined that the PNR can be a key tool in the fight against terrorism. Many governments now demand that organizations collect additional information about

each passenger. This includes: the gender of the passenger, Passport details, full payment/billing information and well as the date and place of birth.

In chapter 11, we will cover using a customer relationship management (CRM) which will be your best friend when it comes keeping all the details organized.

SUPPLEMENTAL RESOURCES



CWSI.net

[Resource for drilling down into the fare classes](#) of the larger US airlines.



Airline Reporting Corporation (ARC)

The [Industry Agents' Handbook \(IAH\)](#) provides you with information about ARC and the airlines that will assist you in operating your business and help you comply with industry instructions and rules.



Airline Reporting Corporation (ARC)

Reference guides on air related topics, we recommend that you focus on the topics at the down of the webpage including [reducing debit memos](#), [avoiding debit memos, refunds and exchanges and debit memo resolution](#).



The major GDS

[Sabre](#), [Apollo](#), [Worldspan](#), [Galileo](#), [Amadeus](#)



Airport Codes

Airport codes are the 3-letter location identifier of airports and cities around the world. You will use these codes when booking your clients. Some websites which list airport codes are: [World Airport Codes](#), [Airportcodes.org](#), [CCRA](#), [Leonards Guide](#) and [Nations Online](#).



CHAPTER 14 | Understanding Cruises

First things first. They're ships, not boats.

Travel advisors sell 2/3rds of all cruises in the U.S. You read that right. That means that if you're a leisure advisor, it's very likely you'll work on a cruise quote at some point in your career.

Travel advisors sell 2/3rds of all cruises in the US.

Cruising Types

Similar to other areas of travel, there are different categories of cruises. We have ocean cruises and river cruises, mainstream cruises and luxury cruises, expedition cruises and small ship cruises, each with different price points and itineraries.

This list isn't conclusive but should give you a feel for the players in some of the most common categories:

Mainstream	Luxury
Carnival Cruise Line*	Azamara
Celebrity Cruises*	Crystal Cruises*
Costa Cruises	Hapag-Lloyd Cruises
Cunard Line	Oceania Cruises

Disney Cruise Line	Paul Gauguin Cruises
Holland America Line	Regent Seven Seas Cruises
MSC Cruises	Seabourn Cruise Line
Norwegian Cruise Line*	Silversea Cruises*
Princess Cruises	Viking Ocean Cruises
Royal Caribbean International*	Windstar Cruises

River	Expedition
AmaWaterways*	Alaskan Dream Cruises
American Cruise Lines	Blount Small Ship Adventures
American Queen Steamboat Company	G Adventures
Avalon Waterways	Hurtigruten
Crystal River Cruises	Lindblad Expeditions-National Geographic
Emerald Waterways	Ponant
Tauck River Cruises	Poseidon Expeditions
Uniworld Boutique River Cruise Collection	Quark Expeditions
Viking River Cruises	Silversea Expeditions
	UnCruise Adventures
	Zegrahm Expeditions

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Classes of Cruise Ships

When cruise ships are built, they often belong to a class of ships. As you study the different lines and become masters of their product and audience, you'll be introduced to the different classes of ships.

Each cruise line has their own ship classes. *Here's a few examples:*

Carnival Cruise Line Ship Classes

- Fantasy Class
- Conquest Class
- Dream Class
- Vista Class
- Spirit Class
- Splendor Class
- Sunshine Class
- Excel Class

Royal Caribbean Cruise Line Ship Classes

- Oasis Class
- Quantum Class
- Freedom Class
- Voyager Class
- Radiance Class
- Vision Class
- Sovereign Class

What ties together these classes of ships? While various classes of ships by brand may share similar features and technical details, they may also share very specific offerings and price points. The amenities may vary slightly but often there are common threads linking all ships within a class.

Cruise amenities are the experiences that the ship provides your client. Examples include fine dining, bars and lounges, casinos and other adult-themed entertainment facilities; shows like Cirque du Soleil or Butlers for every cabin. Some of the new ships feature amenities to surprise and delight like a ropes course, planetarium, formula 1 simulator, giant glass orb, artificial snow and even svedka ice bar.



Training

If you've never been on a cruise, do not worry. I'm over here in landlocked Minnesota and cruising is nowhere near as popular here as it is in areas that are within driving distance of a port (think: Florida, Georgia, NYC, Southern California, Texas, Louisiana, etc.). I don't think I set foot on a cruise ship until my late 20s!

Each of the cruise lines, as well as CLIA (Cruise Lines International Association), have excellent training courses specific to cruises and selling cruises. Once you've settled in at your agency, you'll have access to the cruise lines' travel advisor portals, where you can book, take trainings and find marketing materials.

All the major cruise lines have academies or universities to help advisors learn their product. *Here's a few examples:*

- Carnival's Loyalty Rocks: Learn and Earn
- Celebrity's Five Star Academy
- Norwegian's NCLU
- Princess's OneSource Academy

The trainings are free and after an advisor graduates, some courses even offer a free cruise to experience the product. Woot, woot!

Now we all know that it's MUCH easier to sell something we've seen and experienced vs. taking a course on it. It's hard to admit, but while I'm pouring my heart and knowledge into creating a comprehensive course for you, it pales in comparison to the training you'll receive on the job. *Sigh* It just can't compare, even when I use cute emojis and crack bad jokes.

Anyhow, this is all to say that the cruise lines recognize the power in having advisors see and experience their ships. While some cruise-crazy advisors take an insane amount of cruises every year, in general it's nearly impossible for an advisor to cruise on every ship they sell.

So, the cruise lines offer something called ship inspections, where they organize a time for advisor(s) to tour the ship and maybe even have lunch on the ship. During larger cruise events where multiple cruise ships are in port, an advisor can hit up multiple ships in one day.

Non-Commissionable Fees

Cruise lines are unique in that some have something called non-commissionable fees (NCFs). We mentioned them earlier but here's a refresher: These are best described as fees that lower the amount cruise lines pay commission on.

While NCFs show up on the bill as taxes, fees and port expenses, there's no way for advisors to itemize the NCFs and see the individual amount for any of the categories.

The cruise lines all use similar language used to describe what expenses could be rolled into NCFs:

"Cruise Taxes, Fees, and Port Expenses" may include any and all fees, charges, tolls and taxes imposed on Carnival, by governmental or quasi-governmental authorities, as well as third party fees and charges arising from a vessel's presence in a harbor or port. Cruise Taxes, Fees and Port Expenses may include U.S. Customs fees, head taxes, Panama Canal tolls, dockage fees, wharfage fees, inspection fees, pilotage, immigration and naturalization fees, and Internal Revenue Service fees, environmental fees, as well as fees associated with navigation, berthing, stevedoring, baggage handling/storage, and security services. Cruise Taxes, Fees, and Port Expenses may be assessed per passenger, per berth, per ton or per vessel. Assessments calculated on a per ton or per vessel basis will be spread over the number of passengers on the Vessel. Subject to applicable laws, Cruise Taxes, Fees and Port Expenses are subject to change and the cruise line reserves the right to collect any increases in effect at the time of sailing even if the fare has already been paid in full.

Advisors are conditioned to NCFs. Since travel professionals are unable to break down the NCFs into their individual components (port charges, taxes, etc.), it's impossible for an advisor to estimate the NCFs until they price out a cruise.

Here's a few examples to show you the variation in NCFs:

The NCFs on this cruise booking total **13%**:

Booking Charges Currency: USD	Guest #1	Guest #2	Guest #3	Guest #4	Total
Cruise Fare	2424.00	2424.00	1664.00	0.00	6512.00
Non Comm Cruise Fare	275.00	275.00	275.00	0.00	825.00
2PERKS BEVGRT	0.00	0.00	0.00	0.00	0.00
SAIL NOW SAV	-200.00	-200.00	0.00	0.00	-400.00
HALFOFF3RD4TH	0.00	0.00	-832.00	0.00	-832.00
HALFOFF3RD4TH	0.00	0.00	-138.00	0.00	-138.00
Gratuities	0.00	0.00	155.00	0.00	155.00
Taxes, fees, and port expenses	158.67	158.67	158.67	0.00	476.01
Gross Charges	2657.67	2657.67	1282.67	0.00	6598.01
Comm/Admin	355.84	355.84	133.12	0.00	844.80
Total Comm/Admin					844.80
Net Charges	2301.83	2301.83	1149.55	0.00	5753.21
Amount Paid					0.00
Balance Due					5753.21

This booking's NCFs amounted to **16%** of the total cruise price:

PRICING DETAILS			
All amounts are quoted in U.S. Dollars .			
Fare :	1,149.00	1,149.00	2,298.00
Taxes, Fees & Port Expenses	150.00	150.00	300.00
Future Cruise Credit :	200.00-	200.00-	400.00-
Total Fare :	1,099.00	1,099.00	2,198.00
NCF* :	189.00	189.00	378.00
Onboard Credit :	50.00	50.00	100.00
* Taxes, Fees, Port Expenses & Fuel Supplement			
Land Excursion pricing not included in Total			
Commission:			192.00
Commission:			96.00
Total Amount Received:			0.00
Net Due:			1,910.00

When we do the math for this trip, the NCFs counted towards **19%** of the total:

FINANCIAL BREAKDOWN Currency: U.S. Dollars				
	Inclusive Amounts	Gross Total	Commission	Net Total
Cruise/Journey Fare:		\$2,068.00	\$274.20	\$1,793.80
Est'd Taxes, Fees & Port Expenses:		\$410.00		\$410.00
Total Non-Commissionable Fare:	\$470.00			
Other Commission:			\$36.56	
Booking Total:		\$2,478.00	\$310.76	\$2,167.24

It's worth noting that through the years, there are a few select cruise lines that have paid advisors commission on the *entire fare*. The situations are fluid and can change.

Cruise Tips

Compared to a resort booking, cruises have more moving parts. Literally. Ships sail and that means the selling points go beyond the ship, it's also about the itinerary and shipboard services.

So, what types of things should a travel advisor be thinking about when they're looking at itineraries? Here's a few questions to think about:

- How many days at sea?
- How many days in port?
- How many hours in each port?
- Are the days in port tied to a national holiday that might lead to either closed shops or overcrowded shops?
- Are the ports close to the cities your client will want to visit?
 - *Example:* Ships, advertising Rome on their itinerary, dock in Civitavecchia which is about 45 miles outside of Rome.
- What is the average cost of shore excursions in the different ports?

There's a lot of things to consider with every cruise quote. Here's a list you can keep handy to prompt you during your research:

Dining options

- Does specialty dining have an additional cost? If yes, what's the cost?
- Do they offer drink/dining packages?
- Do they have a coffee/bake/ice cream shop?
- How many dining options?
- Are dining options open every day of the sailing?
- Is in cabin dining offered? If yes, at what cost if any?
- On embarkation day what is open before sailing to enjoy a meal?
- Does the ship offer two seatings for dinner or a "come anytime" between certain hours?
- Can the travelers request a certain sized table that might include sitting with others at dinner vs. only with those you know onboard?

Teen Club

- Do they offer teen entertainment?
- What ages are considered for the teen club?
- Do they offer a tween club?

Kids Club

- Is the pool open to children who are not potty trained?
- How are age groups split up in the kids club?
- How is the staff trained?
- What are the hours?
- Do they offer babysitting?
- Does the Kids Club have extended hours into the evening or on shore days?

Gambling

- How big is the casino if offered?
- What are the casino hours?
- What types of gaming is offered?

Adult-only

- Do they have an adult only pool?
- Adult-only dining option?
- Adult-only area in the spa?
- Suite Offerings
- When booked in a suite, is preferred boarding/disembarkation offered?
- Specialty area in the spa?
- Dining options only for suite guests?
- Are robes included?
- Butler service?
- Advanced dining reservations?
- Advanced entertainment reservations or seating area?

Health Conditions and Special Needs

- Does the cruise line allow pregnant guests? If so, what trimester? Are you booking your clients out more than 9 months?
- Is the ship handicap accessible and what does accessible include?

- How does the dining staff work with food allergies?
- Do they offer assistance for hearing or sight impaired guests?
- If a client is autistic, how might the ship or cruise line assist?

Tipping

- Does the cruise line include tips to staff (room stewards, porters, wait and bar staff, etc.) in the fare or must they be given individually at the end of the cruise?

The list above is by no means inclusive of everything you need to consider, but hopefully will get your wheels turning about the things to consider for your clients. You're starting to see the difference between a travel advisor and a travel agent, aren't you?

SUPPLEMENTAL RESOURCES



Cruise Lines International Association (CLIA)

[Online cruise training](#), courses are usually 30 minutes and cost approximately \$59 per course for non-CLIA members.



CHAPTER 15 | Understanding Accommodations/Resorts/All-Inclusives

Now that you have cruises down pat, let's move on to accommodations. An easy way to switch mental gears is to think about resorts/hotels/all-inclusive brands as the land-based equivalent to the cruise lines and their classes of ships. You didn't realize it, but you're already miles ahead because of the time you invested in understanding cruise lines.

Every resort or hotel chain is like a cruise class. They have certain amenities and price points that tie a group of properties together. Think Days Inn vs. Waldorf Astoria. Both hotel chains fall into an expected price point and focus on a certain demographic and level of service.

The same holds true for the popular all-inclusive resorts in the Caribbean and Mexico. Karisma Hotels and Resorts is a popular brand (like a cruise line) with different properties (like ship classes) that appeal to various demographics.

Here's a few of their properties (like ship classes):



While it was easier to break down the cruise lines into types and classes of service, it's near impossible to classify the zillions of hotels and resorts. What I

can tell you is that once you find your forever agency (Isn't that a cute name? I just came up with it!), there will be certain hotels or resorts that your agency will focus on, helping to narrow things down for you.

Accommodation Tips

It can be one heck of a chore to give you booking specifics about every single resort or hotel out there. Instead, let's give you another handy list of things to consider as you're deciding whether or not the hotel or resort is a good fit for your clients:

Accommodations

- Are RT airport transfers included? (**OW** stands for one-way and **RT** stands for round-trip.)
- Are the transfers non-stop or shared with nearby properties?
- Is there a business center?
- Is there a charge for printing and computer access?
- Is there a fax available for those companies operating like it's 1990?
- Complimentary Wi-Fi?
- Complimentary breakfast? Buffet, continental, restaurant?
- Check in/out times? Is early/late checkout available?
- Valet parking?
- Parking costs?
- Ability to store luggage on site?
- Is there a gym/pool?
- Are there on-site dining options available?
- Any additional fees, like those darn resort fees? (A **resort fee**, also called a *facility fee*, a *destination fee*, an *amenity fee*, an *urban fee*, or a *resort charge*, is an additional fee that a hotel guest is charged, usually calculated on a per day basis, in addition to a base room rate.)
- Family-friendly?
- Pet-friendly?
- Accessible rooms?

Leisure Resorts (including all-inclusives)

- What's the food situation at the resort? European Plan (meals only) or All-Inclusive? If it's a modified European Plan (EP), what inclusions are offered?
- Can dining reservations be made, and if so when, and is there preference given to higher room categories?
- Is childcare included and if so, what are the hours and at what age do they accept children? Complimentary or for a fee?
- Is there an additional cost for childcare outside of normal hours?
- Do they offer in-room amenities for clients with children?
- Kid friendly?
- Is there an adult-only dining option and what do they offer on the kids menu?
- Is there an adult-only pool?
- Kids play area and what is included?
- Adults-only areas?

All-inclusive Specific

- Are tips Included?
- Is liquor included? Rail, top-shelf, top-shelf for an additional fee? (*Top-shelf liquors are generally the most expensive brands of liquor.*)
- How many dining options are offered?
- Are specialty dining charges included or does it come with an additional cost?
- Are clients limited to the number of times they can dine at certain restaurants during their stay?
- Are clients limited to the number of times they can dine at certain restaurants dependent on the number of nights they are booked at the resort?

And one last tip when you're looking at the accommodations. Familiarize yourself with the property's room categories. Just like our classes of airfare, room categories will have different amenities tied to them as well as different price points. It's your job to inform the client that oceanview simply means you can see the ocean from somewhere inside the room. It *does not* mean that the ocean will be right outside their room. If that's what they're envisioning, then direct them to an oceanfront category.



Marriott Travel Advisor - Hotel Excellence

Training includes all the Marriott brands (Ritz-Carlton, Luxury Collection, JW Marriott, Westin, Renaissance, Springfield Suites, Courtyard, aLoft, etc.) You will need to be a working advisor with an IATA, ARC, TIDS or CLIA number to access this training, [keep this as a reference once you are employed.](#)



Hilton Travel Professionals Program (HTPP)

Training includes all the Hilton portfolio of brands (Waldorf Astoria, LXR, Canopy, Curio Collection, Doubletree, Embassy Suites, Tapestry Collection, Tru and more.) This educational program is designed to make you more familiar with the Hilton Worldwide portfolio of hotels. You'll be guided through a series of programs with facts and info about the Hilton Worldwide brands as well as some of the new and exciting ventures that Hilton Worldwide is embarking on. You will need to be a working advisor to access this training, [keep this as a reference once you are employed.](#)



CHAPTER 16 | Understanding Tours and Packages

In the travel world, tours are divided into two different categories: escorted tours and package tours.

Escorted Tours

Escorted tours are typically motor coach- beep, beep!- tours where the clients book into a specific itinerary. Going back to our overused analogy, escorted tours are like a cruise, but on land! You're traveling with a group of people (sometimes people you know, sometimes not) and you're all visiting the same places, checking out multiple destinations as your cute little motor coach and tour guide take you on a tour of the area.

The itinerary is planned, hotel stays are booked and some, if not all, meals are included. Escorted tours can be the traveler's entire vacation, a portion of a trip or it can be added onto a cruise. They're offered on nearly every continent for just about any length of time.

I want to back up for a second because you might be a little confused about how a land tour can be added onto a cruise when a ship is only in port for a few hours. Land tours are popular add-ons for *certain* cruise itineraries, Alaska being one of them.

Alaskan cruisers often include a land tour pre/post cruise. This allows them to see the coast of Alaska by cruise and then see the interior of Alaska and possibly the Yukon by motor coach either at the beginning or end of their cruise. Having explored the interior of Alaska twice, I can tell you the people booking land tour add-ons to their cruise are making the right decision!

Now, not every escorted tour is created equal and that's where you can help your client differentiate between the options. Here's a few things to consider:

- How many people are on the motor coach?
- What meals are included?
- Are alcoholic beverages included with the meals?
- Are tips included when dining?
- Does the tour allow children or have age restrictions on who is allowed?
- How much legroom is there on the coaches?
- Is Wi-Fi included on the coaches?
- Are seats on the coaches assigned?
- How far away from the center of town are the accommodations booked?
- What is the star rating of the hotels?
- Is the tour guaranteed to depart?
- Will the motor coach have onboard lavatory facilities?

Some tour companies only have so many ~~guaranteed~~ departures. Departures that are not guaranteed may be cancelled if not enough guests are booked for that date. As you can guess, it's important to be aware of this and alert your clients in the event they were 100% counting on going on the trip during the days they booked so they aren't unexpectedly disappointed.

Packaged Tours

Now packaged tours are quite a bit different than the escorted tours. While escorted tours involve traveling with a group and a scheduled itinerary, packaged tours are better envisioned as a package deal. Honestly, I'm not even sure why the word tour is in there.

Essentially what's happening is tour operators (or sometimes called wholesalers) buy air seats and hotel rooms in bulk. The wholesalers are looking for discounted pricing on air/hotel for popular tourist destinations like Hawaii, Caribbean/Mexico, Paris, etc. They agree to sell X amount and in return for the wholesaler taking on the risk, the airlines and hotels give them a discounted rate. And we know from our airline chapter that the technical term for the discounted air would be *private fares*, right?

So, leisure wholesalers like Funjet Vacations, Delta Vacations, GOGO Vacations, and Europe Express package up their deals and resell them at a better rate than you could get if booking the components individually. Some tour operators are agency-facing only, while others sell through both travel agencies and direct-to-consumers.

The tour package can include air, car, hotel/resort in any combination as long as it includes air. Air and hotel/resort packages are the most popular vacation packages and provide the most savings. Like we did in previous sections, we'll give you a few questions to consider when looking at tour operators:

- Does the tour company have a phone number available 24/7, 365 days a year if an issue comes up during travel and you/your client needs help immediately?

Airfare

- Can clients choose to upgrade to first class or premium?
- Are frequent flier miles earned?
- Can seats be preassigned?
- What is the minimum number of either hotel nights or car rental days necessary to receive a discounted air rate?

Resort/Hotel choices

- Are the hotel/resort properties you're interested in carried by the tour operator?
- What is the tour company's agreement with hotels and resorts if an overbook situation arises and your client is forced to change accommodations or "walked" (put in a different property)? (*The term in the travel industry is "walked." That's when a hotel tells a traveler with a confirmed reservation that it does not, in fact, have an available room and instead books a room for the guest at another hotel.*)
- Are all room categories available in each resort you are interested in?
- How many nights do you have to book to get the discounted air?

Car Rentals

- What car rental companies are offered?

- Can clients apply their car program member number to the booking and receive perks they would normally receive by booking outside of a package?
- Can you do just an air and car rental to receive a discount on the air?
- What is the minimum number of car rental days for the air discount?
- Can you book a car whose occupancy is less than the number of people on your reservation and still get the discounted air?
 - *For example*, there's eight people on the reservation but your client only wants to book a compact car.

Transfers

- Are hotel transfers included?
- Does the client have the option to upgrade to private or non-stop transfers?
- If transfers are shared, how many hotels might your client expect to stop at before arriving at their destination?
- What is the maximum number of stops in a shared transfer?

So, there you have it. That's tours in a nutshell!

SUPPLEMENTAL RESOURCES



American Society of Travel Advisors (ASTA)

Once you are a member of ASTA you will have access to their member-only [*Guide to Selling Tours*](#).



CHAPTER 17 | Understanding Group Travel

Don't go to mince my words: travel advisors who turn away groups are leaving money on the table. While coordinating for a group of people can be complicated and require supreme organizational skills, the higher earnings make it more than worth it.

Group travel casts a wide net: It can be an intimate group of 10 friends celebrating retirement, or it can be hundreds of people cruising together.

The good news is that for advisors who are already set on a niche (that topic is up next, so hold tight!), booking groups isn't a matter of reinventing the wheel. It's a way to optimize your earning potential whether you book one group trip per year or one per week.

Here's (a brief) overview of groups.

Why Book Groups?

How can booking groups help optimize your earnings?

Better Pricing and Value for Your Clients: Booking groups (especially when you block space out waaaay in advance) is a strategy to offer your clients competitive pricing. In a way, advisors act as mini-tour operators when they set aside group space. They're saying, "I'm pretty sure I can sell this space." In exchange for the advisor taking on some risk and doing a larger booking volume, the cruise line or tour operator gives the advisor special pricing. (It's yet another aspect of planning travel that separates you from OTAs).

When advisors book groups, they are also likely to get tour conductor credits (TCs). What's this? It means you get a free room or berth - berth is bed in cruise lingo - for every 6 or 10 rooms you book. (It varies by suppliers, so make sure you ask!). Advisors use these conductor credits in a ton of creative ways, providing more value for clients and/or higher earnings for you. *(Find creative ways to use tour conductor credits at the end of the chapter and below, tour conductor credits is cover in #8 of the article. The whole article is worth a read. It highlights travel advisors who work with groups. Each advisor has a different niche and they discuss what they do and how they do it.)*

Meet advisors who share their creative ways of using tour conductor credits



More commission for you: This part is easy. The more you book, the more you earn. But truly it's about more than just that.

- **More recognition, perks and amenities:** When you book groups, that can quickly increase your passenger count, which helps set you apart and gains recognition for your agency. It can lead to more perks, more amenities, and more invitations to FAM* trips. These are all puzzle pieces in setting yourself apart to your clients as well. Which brings me to . . .
- **Booking groups leads to more clients:** Showing the great service you provide firsthand is the best form of marketing (and it's free!). Booking a group is a great way to broadcast the value of your services. When you book one amazing destination wedding, the party members may come to you when it's time to book their next trip.

Ultimately, opening yourself to the possibility of booking groups can lead to greater income potential for you and better value for your clients.

Here's an overview of the different kinds of groups.

As you have already discovered, the travel industry uses a lot of acronyms. Familiarization Trips, better known as **FAM trips, are educational trips organized exclusively for travel advisors and resellers, by travel businesses such as tour operators, destinations and accommodation establishments. ASTA provides FAM trips (called Educational Journeys) to many destinations around the world.*

Types of Groups

If the thought of booking groups feels overwhelming, let me talk you down: in the eyes of suppliers, groups don't necessarily have to be massive. Sometimes a travel advisor can secure a group rate or commission for booking as few as five to ten travelers or rooms. Sometimes, the party doesn't even have to be traveling together (counter-intuitive, I know . . . but read on).

When it comes to selling travel there are essentially two types of groups you can book:

Affinity Groups

Affinity groups are groups you don't need to create: an extended family reunion trip, a soccer team, caretakers from your toddler swim class, a wedding party, or your local bee appreciation group (everyone is a part of one of those, right?!). Affinity groups can be great for first-time group bookers because you don't have to herd everyone, they're already united by a connection.

Typically, when it comes to affinity groups, a travel advisor will work most closely with what we like to call in the industry, a Pied Piper. What is a Pied Piper? (I mean, other than a mythical hypnotic flutist?) It's a group ambassador who serves as a go-between for you (the travel advisor) and the group members. Pied Pipers are great because they do a lot of legwork of corralling the group to make critical decisions and communicating important deadlines like deposits and final payments.

Affinity groups can be incentive or corporate trips. That's right, even corporate folks like to have fun sometimes! Hear from an advisor who plans corporate events at sea for companies.

Interview with Travel Advisor, Rita Perez

Rita Perez [shares how she plans corporate events at sea.](#)



Speculative Groups

Speculative groups are those you need to cobble together. They're centered around a destination or trip rather than an event.

With a speculative group, a travel advisor will block a group of rooms on a cruise, tour or resort without knowing who will fill them. Travelers who join an advisor's speculative group may not know each other. You, the advisor will market that particular ship/destination or trip in an attempt to wrangle together a group big enough to fill the space.

Speculative groups are more risky because if you don't fill all the rooms by the deadline, you might be left with hefty cancellation penalties from the suppliers. Because of that, this type of group is more ideal for an advisor with a few years experience under their belt. So, if you're just cutting your teeth on booking groups, you'd likely want to start with affinity groups. But if you're looking for some speculative group inspiration, here's a story about an advisor filling up her 196-person group in just one month. How did she do it? By being strategic in the group sailing she set aside.

Interview with Travel Advisor, Valerie Gossett

Let's listen to Valerie Gossett [story about filling up her 196 person group in one month.](#)



[Bonus] Non-contracted Group Promo Codes

Remember earlier when I said people didn't even have to be traveling together to make a group? Non-contracted group promo codes are what I'm talking about.

The jargon for this type of group will vary from supplier to supplier. Different suppliers will call this by different names. Some may call it **Group Ease**, some call it **Flex Groups**. I completely made up the ridiculously long term non-contracted group promo codes, so if you chat casually about it the next time you hang out at the water cooler, you may get some blank stares unless you're chatting with me.

It boils down to this: suppliers want you to book more of their product. To incentivize advisors, some suppliers will offer advisors a group code once you hit a certain booking threshold. It might be 10 people or 5 rooms. Some suppliers may not offer it at all (but you'd know this since you're schooled in qualifying travel suppliers).

An example might be booking a handful of students on a spring break trip to Cancun, Mexico. Maybe they go to different universities, don't even know each other and have different dates of travel. But if they're going to the same resort, you can get a promo code to book these strangers as a de facto group. With a non-contracted group promo code, you can apply that code to each booking and receive group perks.

The beauty of this is that it's a risk-free way to get a little boost in your commissions. Typically, if a supplier offers these non-group groups you'd earn somewhere between a standard booking and a traditional (affinity or speculative) group booking.

If you end up with cancellations and don't make your threshold, in most cases it's no harm no foul. You just lose your promo code and will be bumped back to your original commission level. How's that for nifty?

Group Tips

I don't want to put the cart before the horse. Booking groups could be its own year-long course. There's a ton to consider. But here's a few other points I want you to keep in the back of your mind before booking groups:

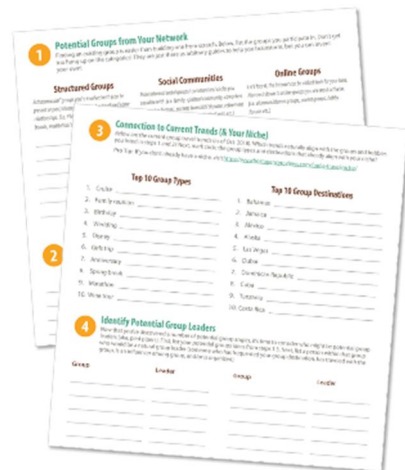
Start slow: When it comes to groups, I like the motto, *see one, do one, teach one.* Booking groups is a different beast than booking an individual traveler. Before you attempt to book a group make sure you know what you're getting into.

Why take it slow? Because groups often entail complicated and stringent group contracts, and a minor mistake, miscommunication, or a missed deadline can be a big doozy. *(For example, you don't want to learn the hard way that you need to pad deposit payment deadlines for your travelers.)*

Ask another more experienced advisor in your office to walk you through their process. Do your research so you know what you're getting into.

Qualifying groups is a different beast: When it comes to travelers *and* suppliers, qualifying groups is a whole different ball game.

There's more to consider when qualifying a group than qualifying a single traveler. You need to make sure you're communicating with a strong group leader. You also need to ensure you're catering to the interests of the entire group. Where to start? In the supplemental readings list at the end of this chapter is a group brainstorming guide to help you discover where in your network there's group potential.



Likewise, there's more to consider when qualifying a supplier as well. A supplier might be amazing for your clients taking their family on vacation, but if they don't have sufficient support to help you promote and plan your group, your clients' dream trip could quickly become your worst nightmare.

When you do find a great supplier, you need to know a lot of nitty-gritty details before you ask them for a group quote. *(For those that are into extra credit, at the end of the chapter is a download on what to know before you reach out to suppliers to ask about groups).*

Read the fine print (then read it again): Group contracts are the real deal. If you want to book a group, make sure you're abundantly clear on the expectations from the supplier. How does the supplier count rooms, aggregate total? How long

can you hold rooms without a deposit? How much attrition do they allow (if any)? These are all things you'd want to know before you book a group.

Everything is negotiable: Man, how I wish someone had told me that when I first started! When it comes to working with hotels/resorts and your groups, remember that everything is negotiable. If it's important for your wedding group that the photographer be included and they get the sunset wedding spot, work that into the contract. If you're bringing a hotel a group of 80, see if premium WiFi can be included in the contract in addition to a free breakfast buffet.

In the interview below, Karen shares tips on how she negotiates her group contracts.

Interview with Travel Advisor, Karen Hurlbut

Karen imparts her 35 years of wisdom and [shares her tips on negotiating group contracts.](#)



Note: Cruise lines have a more formal structure for groups than their land based buddies. Each sailing will have a certain number of Guest Amenity Points (GAP points) for groups that allow you to “buy” certain things like a cocktail party, meeting space, etc. Once your group’s GAP points are used up, they’re gone.

This isn't to scare you away from booking groups. Far from it. (Be inspired by this [advisor's ability to find groups everywhere](#), even in her local pizzeria.) It's just to emphasize that there's higher risk with higher reward. But the rewards are great, and a successful group trip is a win for everyone: clients receive great value and perks you wouldn't otherwise be able to access, and you receive a bump in commission and a fast-track to growing an enduring client base (aka, fan base). Warm fuzzies all around!

Interview with Travel Advisor, Deb Fogarty

Let's listen to find how [Deb booked a \\$220,000 African safari and 45-person group cruise without relying on traditional marketing](#).





Host Agency Reviews

[Creative ways these six travel advisors use their tour conductors.](#)



Audio Series - episode Vol. 16 of *Travel Agent Chatter*

Hear from Rita Perez an advisor who plans [corporate events at sea](#) for companies.



Audio Series - episode Vol. 10 of *Travel Agent Chatter*

Hear from Valerie Gossett [on how she filled up her 196-person group in just one month.](#)



Host Agency Reviews

Download this [group brainstorming guide](#) PDF.



Host Agency Reviews

Article with a PDF worksheet on [what to know before you reach out to suppliers.](#)



Audio Series - episode Vol. 15 of *Travel Agent Chatter*

Hear from Karen Hurlbut on [how she negotiates her group contracts.](#)



Audio Series - episode Vol. 3 of *Travel Agent Chatter*

Be inspired by travel advisor, Deb Fogarty with her [ability to find groups everywhere,](#) even in her local pizzeria.



CHAPTER 18 | FITs

FIT stands for Flexible Independent Travel. You'll likely see some other variations like Free Independent Traveler, Full Independent Tour, Flexible Independent Tourist. Honestly, everyone just calls them **F-I-T-s**.

What the letters stand for isn't really important. **What's important is that you understand a FIT trip is a custom trip.** You're not booking a package or using a pre-made itinerary, it's not an escorted tour. A FIT involves the travel advisor painstakingly building an individualized itinerary to meet the client's specifications.



Some agencies book enough of certain areas that they have their own in-destination contacts who help them book the segments of the trip. Most agencies use a tour operator that specializes in FITs when building these unique, detailed itineraries. The companies that specialize in FITs do this all day. They have their vetted list of on-the-ground vendors they work with to ensure your clients will have an amazing trip, which makes you look like a rock star.

Newer advisors might not understand the danger in using multiple FIT companies to build an itinerary. It might seem harmless to book the hotels in France with one company and the Spain hotels through another. And what could go wrong with using a different vendor for the sightseeing tours, especially since it saved the client a little money? In short, a lot.

Booking your client's hotels, trains, interpreters, guides, cars, sightseeing, dining, tours, etc. through the same company allows for a seamless trip for your client, in addition to a one phone call solution if problems arise.

Booking your client's hotels, trains, interpreters, guides, cars, sightseeing, dining, tours, etc. through the same company allows for a seamless trip for your client, in addition to a one phone call solution if problems arise.

Here's an example: While traveling, a road floods out and the client's itinerary needs to change on a dime. When you've booked it all with one company, they handle the changes downstream that need to happen because of the delay. There will likely be no change penalties since the entire booking is with one company. If that trip was booked with 5 separate companies, the travel advisor would be responsible for alerting the other companies of changes that need to be made due to the flooded road and the companies may charge change or cancellation fees.

The world of FITs is complicated by its very nature. Working with a FIT-focused tour operator helps to take some of the weight off the advisor's shoulders. Using a tour operator with experience in FITs may be the norm, but advisors with deep destination knowledge and on-the-ground connections can also tap into those networks to create an unforgettable trip for their clients. Have a listen to a Japanophile who created his own network of in-destination vendors for inspiration!

Interview with Travel Advisor, Andres Zuleta

Let's listen to [Andres Zuleta, owner of Boutique Japan](#). Andres started out as a trip designer for a travel company and ended up growing his own agency into the \$2.3 million dollar business it is today.





Audio Series - episode Vol. 12 of *Travel Agent Chatter*

Have a listen to [Japanophile, Andres Zuleta who created his own network of in-destination vendors.](#)



CHAPTER 19 | Creating Your Niche

To niche or not to niche? That is the question. Some travel advisors prefer to whittle their niche down to a fine point (*e.g., for example, aurora borealis tours of Greenland for Astronomy majors*) whereas some prefer to remain a generalist (someone who books anything).

As with most things travel, there's a lot of in-between. But at the very least, considering a niche when you're getting started is a good idea. Here's why:

Why Establish a Niche?

In the interest of full disclosure, I'm on Team Niche. With a myriad of types of travel to sell, starting out with a niche can help spare you from feeling overwhelmed and help you target down-the-road future employers. It helps you take inventory of your strengths, passions, organic social networks and apply all of that to your professional development.



Starting with a niche is a great way to focus your efforts. With a niche you can:

- Focus your educational efforts on particular products or types of travel and develop a deeper knowledge of your particular industry more quickly.
- Develop a better understanding of your target market.
- Make it easier to define a unique selling point for the service you provide.

Ultimately, your niche will provide you with a compass to navigate a career of selling travel.

Travel Niche Myths

Some advisors are hesitant about developing an expertise in a certain product, destination or travel style. Will that limit your career prospects? Will you become a call center, booking the same thing repeatedly?

Let me calm your fears. A niche is not a life sentence, nor does it inhibit your career trajectory. Here are a few myths we need to put to bed:

You can't sell outside your niche: Most agencies sell a wide variety of travel. Individual advisors within agencies will have specialty areas but that doesn't prevent the advisor from selling other types of travel.

In fact, many advisors have multiple, complementary niches. Maybe you have a deep love of Australia and the Pacific Islands so all those inquiries land on your desk. Part of what you love about those bookings is many of them are honeymooners and you're a sucker for newlyweds. Since you have the setup and coordination of honeymoons down to a science, you also take on honeymoon quotes, no matter the location.

This will, of course, vary by agency. If you get a job at Scotland Travel and Tours, you very well may only be selling Scotland.

You'll lose out on potential clients: Think of it in terms of quality over quantity: targeting a clientele will ultimately help you gain and maintain client relationships.

Establishing a niche ensures you're attracting the right kind of client who will value your specific skills and expertise. An advisor shines so much brighter when it's an area they're passionate and well-versed in. After all, if you're not clear on what makes you unique as a travel advisor, potential clients won't know either.

Once you choose a niche, you're stuck with it forever: Niches are fluid, and even with a pin-pointed niche you have the ability to grow. You can always expand the products, destinations, and interests you cater to.

Take me for example. I run a website dedicated to reviewing host agencies. That's pretty darn specific! But I grew the site to also include reviews of consortia

and franchises as well. I found a way to scale my business when it was time to grow without straying far from the original intent of my niche- equipping advisors with information to start (or grow) their career as a travel advisor.

A niche is just a launching off point to help provide you with focus and ensure you're creating a business that is rooted in your strengths, interests, and passions.

So, take a deep breath. Establishing a niche will help you plant the seeds of your business and ultimately thrive.

Now let's chat on how to go about doing that . . .

How to Establish a Niche

I like to think of developing a niche as a game of connect-the-dots. When you embark on establishing a niche, you can start by asking yourself or brainstorming on a few questions:

- **What gets you out of bed in the morning?** Okay, maybe for some it's quite literally a screaming toddler, or a demanding and hungry dog. But what I mean by this is, what's your passion? What makes you excited to go about your day?

Maybe it's a meditative reprieve from your screaming child (you might be great at planning wellness retreats for parent getaways). Or maybe it's the look of sheer joy on a friend's face when they find the moon during a late-night luminary hike for the first time. (You might love planning nature-based travel.)

What are these things that offer you moments of joy? How can that translate into a rewarding career of selling travel?

- **What are my natural social networks?** Who shares your joy? What communities are you already a part of? Do you attend any (formal or informal) clubs or groups? Are you a part of any organizations?

By looking at your natural networks, you can begin to see where your interests and skills intersect. Are you deeply embedded in a local or online group of people passionate about reading or movies? How could that intersect with your travel for passion? Maybe you could tap into those circles and set up themed tours based on popular books or movies.

- **What destinations?** Do you like a particular region or area of travel? Are you targeting a certain climate or ecosystem, regardless of what continent it's on? The world is a big place (which we're about to learn in our geography segment). Focusing on a few regions or destinations you're most interested in can help you narrow it down.
- **What type of travel:** This one is a little trickier to nail down. But here you want to consider if there's a type of travel you prefer. You break it down like with:
 - Is there a demographic you want to sell to? Maybe you have a magic touch with families/seniors/students/music-lovers.
 - What budget do you feel comfortable selling? Are you a high-ticket luxury seller? Do you prefer to focus on high-value moderate trips?

Keep in mind, this is NOT to suggest you should only sell to your pocketbook. It will just help you figure out where you want to focus your efforts as you qualify suppliers.

- What type of travel do you enjoy? Solo travel? Family vacations? Group travel? Cruising? All-inclusives? Chances are, you'll be more of a natural at selling a type of travel you enjoy.

This is just the beginning. Establishing a niche is part art, part science. But finding a confluence between as many of these factors as possible is a great start to establishing a niche.

In this resource, we go into more depth about establishing a niche. It also provides a great exercise you can download to really walk you through establishing a niche.

The worksheet is titled "Establishing a Niche" and is divided into four columns: Hobbies, Destinations, Type of Travel, and Network. Each column contains a list of questions and a corresponding table with rows for "Hobby", "Destinations", and "Network".

Hobbies

- What are you passionate about? (e.g. politics, genetics, skiing)
- What do you have an in-depth knowledge of? (e.g. wines, gardening, fishing, medicine, history)
- What are you good at? (e.g. cooking, stand-up comedy, building a house)
- What do you do in your free time? (e.g. genealogy, writing, read, wedding inquiries)

Destinations

- Of the places you've been, what are your favorites?
- What places are you dying to see?
- What do the destinations you loved about have in common? (e.g. culture, weather, good food)

Type of Travel

- Is there a particular demographic you'd like to sell to? (e.g. families/groups, seniors, music lovers)
- What type of trip would you feel comfortable selling? (e.g. solo, short or offbeat to push your marketing, group agents under the banner of pushing their specialty niche on their clients, (e.g. luxury, bargains)

Network

- What business networks do you belong to? (e.g. BNI, sales, boards)
- What events have you attended recently? (e.g. PSD events, seminars, day training class)
- What are common hobbies of your ideal clients? (e.g. hiking, golfing, drinking)
- What groups do you belong to? (e.g. Career support, volunteer, etc.)

Read the full article with additional tips at www.hostagencyreviews.com/blog/finding-a-niche

SUPPLEMENTAL RESOURCES



ASTA's Niche Travel Specialist PDF

ASTA has an older yet still valid PDF on how to determine what would be a good niche for you as well as promoting and selling special interest (niche) travel. More than 100 areas of travel specialization are discussed including: Ecotourism, wine/gourmet, historical/cultural, disabled, scuba diving, spa/fitness, dude ranch, spiritual/religious, sports, gay & lesbian. [This PDF can be purchased for \\$3.99 on ASTA's association website.](#)



Host Agency Reviews

Exercise to help you [walk you through establishing a niche.](#)



CHAPTER 20 | Geography

The world is a pretty darn big place. As a travel advisor, it's important to have a strong foundational knowledge of geography. That said, knowing where all 195 countries in the world are, as well as those countries' popular and off-the-beaten path tourist destinations and their airport codes? Well, that's just impossible unless you have a photographic memory. (Which I do not.)

So, here's my suggestion when it comes to geography: Find the areas of the world that interest you and learn those front to back.

This is one of the reasons a niche is important. You simply cannot know everything about everywhere. Having a deep knowledge and understanding of your area of expertise is key to being the best advisor you can be.

If you're interested in selling ocean cruises, it makes sense to familiarize with the countries and cities that the major cruise lines stop at. You should know where Nassau (Bahamas), Ocho Rios (Jamaica), San Juan (Puerto Rico), Philipsburg (St. Maarten) and other popular cruise ports are located if you want to be selling Caribbean cruises. While it's helpful to be educated on the surrounding areas, as you're learning about Nassau, you probably won't need in-depth knowledge about Mayaguana, which by the way is least developed of the islands of The Bahamas.





So, when you're learning geography, use your niche to help figure out where to focus your energy.

Let's do another example. If you're specializing in Egypt, you can really drill down and get to know the geography of the entire country. Think of it like your state, each region and city has a different feel. If you're an Egypt specialist, you should be able to explain those subtle (or not-so-subtle) differences to your client.

Compare that to our earlier example of a Caribbean cruise specialist. They may not need to know the smaller towns/regions of an island if there wouldn't be enough time for a client to explore them while in port. Instead, they should focus on getting to know the islands, countries, and ports that their clients will be most likely to visit.

How do you figure those out? Experience. Trainings. Maps. And my favorite, Google.

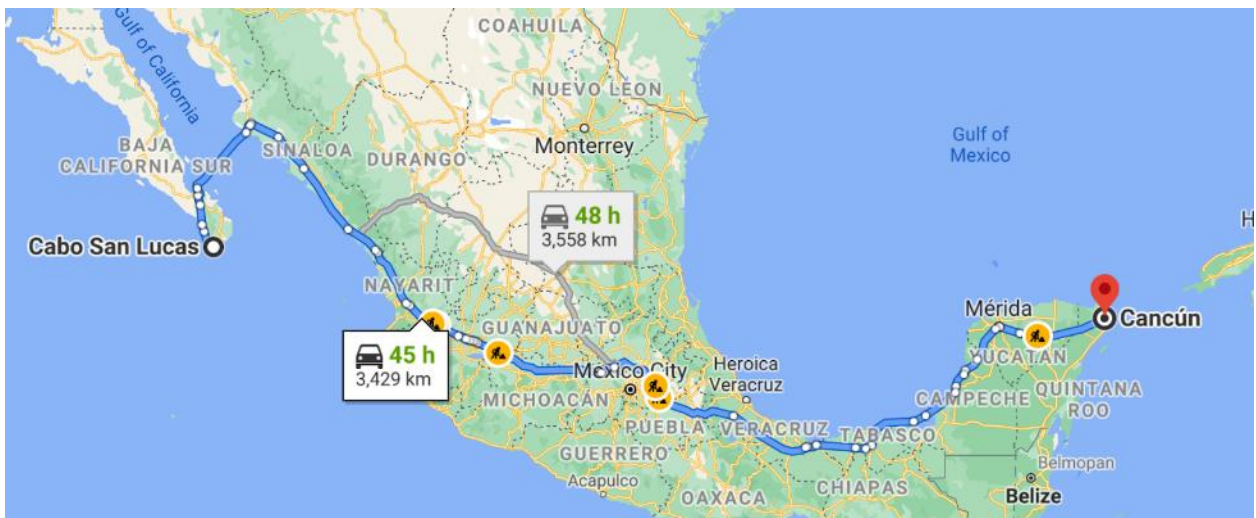
ASTA has a GeoCultural course which gives a great overview of the world including the important places and regions that every travel advisor should know.

If a client comes to you with an area you're unfamiliar with and you'd like to book it, just remember to compare the time investment needed to know the area well enough to ensure your client has a wonderful trip, to the commission you'll be earning. If the chances of you booking another Patagonia trip are incredibly slim, think about passing that booking on to a fellow travel advisor that specializes in Argentina and Chile. In the end, the most important thing is that the client has a great experience and if you can't provide that, it's better to pass on it.

If you're a corporate advisor, knowing the airports (and airport codes) of the countries your clients are flying in and out of is paramount. When a client needs to get from JFK to Mainz, Germany, it's important to be familiar with the location of the major cities in Germany so you can figure out the best airport for them to fly into.

Of course, a simple Google Maps search will show you that Frankfurt is the closest large city but it's more efficient to be familiar with the geography of these places before they pop on your plate. Type a search for FRA > JFK in your GDS and you'll have all the flight options for your traveler!

One last word of caution. Consumer advocate (and typically strong supporter of travel advisors), Chris Elliott, was approached about a hobbyist travel advisor with horrible geography skills. When the client asked for a vacation to Cabo San Lucas, Mexico, the hobbyist booked the Hard Rock in *Cancun*, believing Cabo San Lucas was in Cancun. How, you ask? Why, you ask? I have no idea, but it's real. There is a link at the end of this chapter so you can read Chris's article.



Knowing your geography is a key part of being a fabulous travel advisor. The trick is being able to narrow down the geographical area(s) you need to be familiar with and knowing when to pass off bookings you're not able to deliver on.

SUPPLEMENTAL RESOURCES



American Society of Travel Advisors (ASTA) Geography course

[ASTA's Geography/GeoCultural course](#)



Elliot Advocacy - Consumer Advocate website

Chris Elliott, was approached about a [hobbyist travel advisor with horrible geography skills](#)



CHAPTER 21 | Researching

It's important to be honest here. There isn't a set way travel advisors research. Every advisor finds their own little tricks that work best for them to navigate the travel landscape.

Go-To Resources

That said, there are a few go-to places for every advisor. When it comes to the legal requirements of destinations, travel advisors turn to the U.S. Department of State for the most trusted information. There are many other sites with visa and passport information but **it's essential that the sources you're using are reliable and current**. Getting the visa entry requirements wrong is a real party foul and could lead to your client being unable to enter the country.

The international travel section of the U.S. Department of State's (DOS) website is a lifesaver for any travel advisor! The DOS's site lets you easily search for visa and passport requirements to enter, any currency restrictions and necessary vaccinations for every country. You should provide this link to any client with an international travel booking.



We all know how quickly things can change in a destination. Whether it be a rapidly spreading pandemic with borders closing within days, civil unrest or a terrorist attack, these things can cause a destination to go from green to red in no time. Make sure to sign up for the DOS's travel advisory alerts for your clients' destinations and register them with the local US consulate office through the DOS's Smart Traveler Enrollment Program (STEP).



Smart Traveler Enrollment Program
 A SERVICE OF THE BUREAU OF CONSULAR AFFAIRS
 U.S. Department of State



The DOS's international travel site also informs you of travel advisories to the area and goes over items like local laws and special circumstances to be aware of like local views on LGBTQ+ and the accessibility of the country for those with mobility issues. And that's just the start of the valuable information. For a government website, it's quite a gem!

Supplier Research

Whatever your travel niche—corporate, leisure, meetings, etc.—travel advisors look at multiple vendors to find the best value and fit for their clients. In Chapter 7 we discussed how to qualify suppliers and the importance of using preferred suppliers or vendors. Those two things are the first things you're going to do as you start your research. Figure out which supplier(s) are going to be a good fit for what your client is looking for.

You can log into a vendor portal or, for more complex trips (especially FITs or groups), you can call in to start getting some quotes. Honestly, most research consists of knowing which of your preferred suppliers can meet the client's needs. Once you've narrowed it down to a few suppliers, you're going to log into the portal and see what's available.

What if there are too many options to choose from, you say? That's why it's so important to qualify your client. If you have not thoroughly qualified a client, it makes researching a trip impossible due to the endless possibilities.

*If you have not thoroughly qualified a client,
it makes researching a trip impossible due
to the endless possibilities.*

When you come to the research stage, you should know exactly what's important to the client. If they want to go to Los Cabos for a trip, there are literally hundreds of hotels to choose from. However, you can help narrow down those choices by considering your client's interests and price range. What type of experience and feel are they expecting from the resort? Is all-inclusive important to them? Are there some must-have amenities? Are they anticipating being closer or further away from Los Cabos? Is a walk-out view of the ocean important? Are they looking for an adult-only resort or can it be kid-friendly?

Success starts from the very moment you connect with a client. If you don't have the right inputs, you're going to have the wrong outputs.

So, we've solidified that in order to be successful at research, you need to have the right input to help you narrow down the options. Chances are, there are going to be multiple suppliers that can fit the needs of your clients. When you know the perfect hotel/resort for your client's package, all you need to do is log in to the tour operators that carry that vendor and see what's available.

The tour operators may have different air schedules, making one option more attractive than another. Or, a tour operator may be sold out of the room category your client wants. Since pricing is based on availability, a company with low inventory may have much higher prices than their competitors. All of these things help you narrow down options for your clients.

As you become more familiar with vendors, you'll start to develop your favorites. However, as you start your career, expect to spend a lot more time in the research phase than your experienced colleagues. This is how we all learn and become better at our jobs!

Destination Research

As a new advisor, you will likely be spending a lot of time on destination research. In addition to supplier trainings and host/consortium trainings, every tourist

destination and country will have a tourism board or a conventions and visitors bureau (CVB) that can help you find more information on the destination.

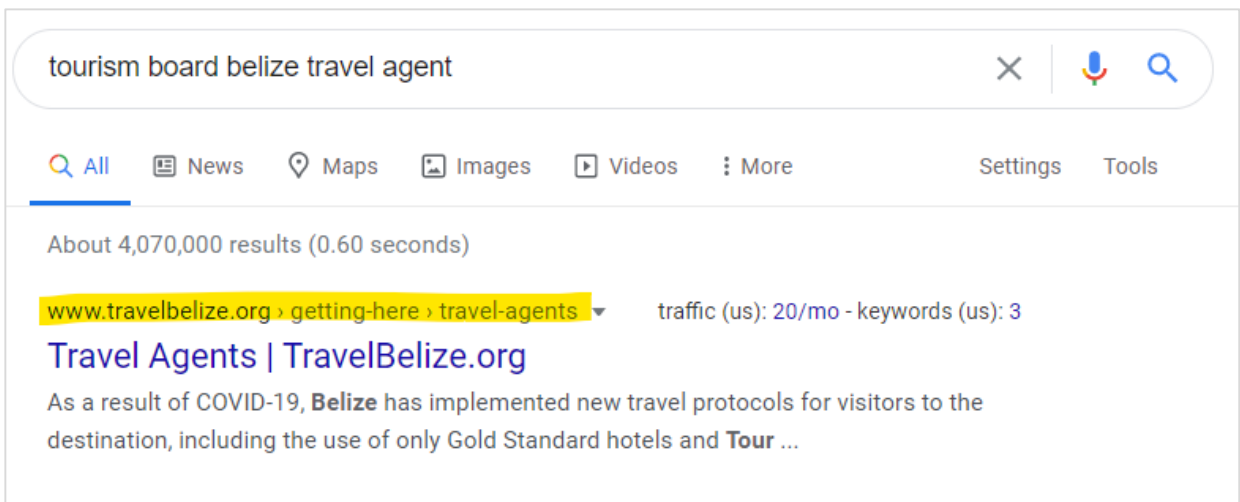
Cvent, an indispensable tool for any meeting planner, has CVB directories for every major region of the world: Africa, Asia, Australia, Canada, Caribbean, Central America, Europe, Mexico, South America, United States.

What is Cvent? Cvent is an online software platform for meetings and event planners.

What are CVBs? The term stands for Conventions and Visitors Bureau (CVB) is a local tourism marketing organization and is designed to market a destination to travel advisors, traveling public and provide area resources and advice about the destination. In the U.S. alone there are approximately 625 CVBs.

While Cvent's directories are focused on meetings and large groups, it's still a great tool for any travel advisor to have in their tool belt.

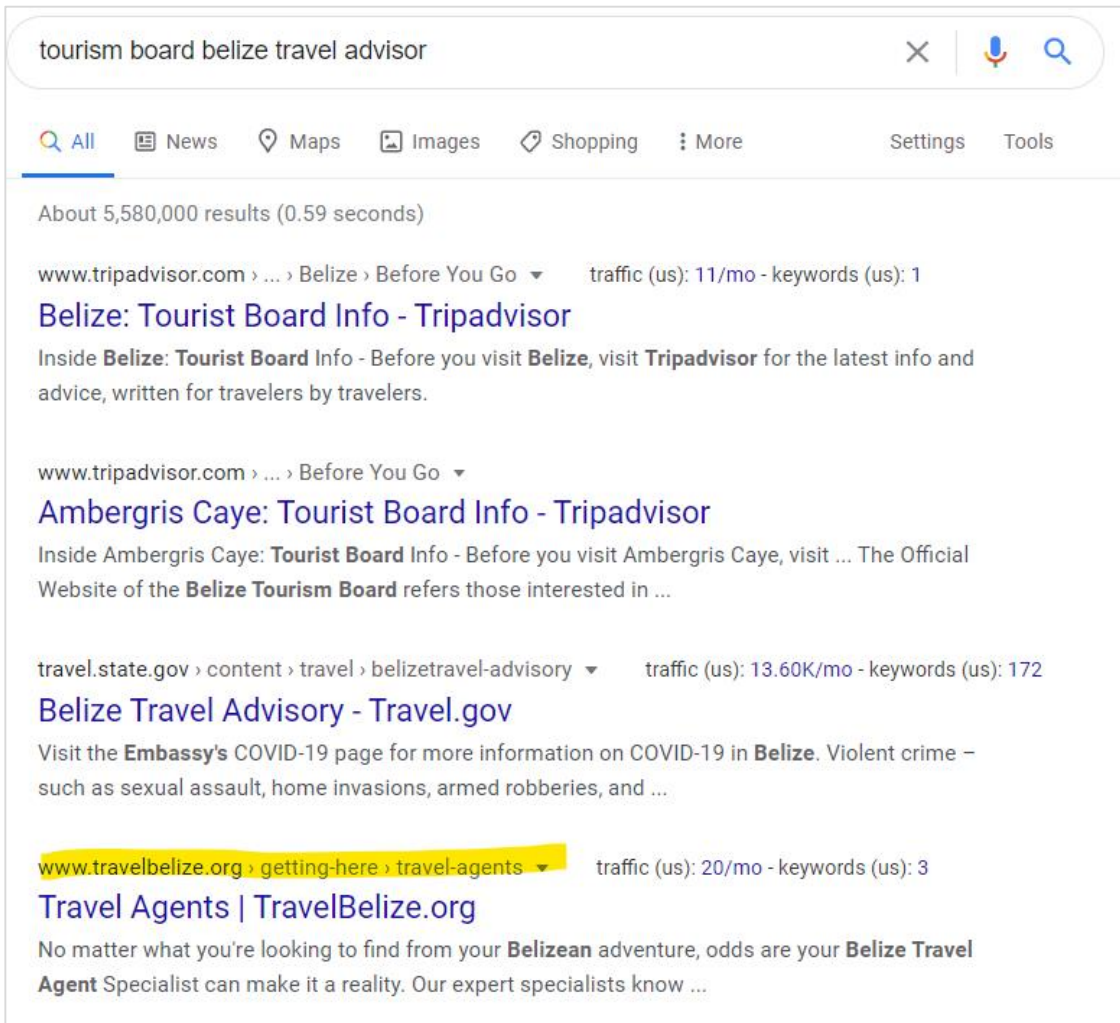
Of course, the handiest tool of all is Google. When you want to find travel-advisor-specific information from a particular tourism board/CVB, google that baby! Let's try it out with **tourism board Belize travel agent**.



BAM! First result.

The key is that you want to find the CVB's or tourism board's resources that are focused on travel advisors, not their regular consumer information (although that can be helpful too).

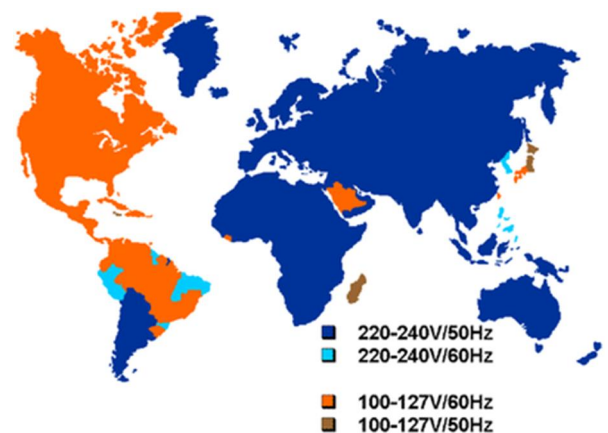
You'll notice I didn't use the word "travel advisor" in my search. Here's why. Most CVBs and tourism boards still use the term "travel agent" Using "travel agent" in your search quickly gets you to the results you want. Let's see what happens when we use "travel advisor" in my search:



The result we want is buried further down. So be efficient and use the verbiage the CVBs and tourism boards use.

Other things you might consider exploring in your destination research are things like:

- **Medical facilities:** If you know your client has a chronic illness, use your connections with tour operators and on the ground contacts to find the best hospital/clinic nearby.
- **Local foods:** Destinations will often have certain dishes they're famous for. Be familiar with those as a way to paint a picture of the experience and culture for your clients so that when they touch down, they're ready to try their first pierogis. (Bonus points if you suggest a local restaurant known for the dish.)
- **Customs and culture:** Help your clients understand what's acceptable dress and action for their destination. A tank top and shorts may make them feel pretty darn uncomfortable in more conservative countries. In Thailand, patting someone's head is incredibly offensive. In many Asian countries, it's expected that you take off your shoes indoors. In many countries, tipping isn't necessary and can even be seen as offensive. And if your clients have never been to a country where people kiss cheeks as a form of greeting, you may want to give them a heads up.
- **Safety tips:** While it's the norm to drink out of the faucet in the US, in many countries that can cause a traveler a world of digestive issues. Let them know to only drink out of sealed water bottles. Send your client the local 911 number and let them know where the US consulate offices are.
- **Language:** It's easy to forget that not everyone speaks English. Inform your clients of the local language and send them a link to DuLingo so they can learn a few fun phrases to prep for their trip and delight the locals.
- **Practicalities:** In the US, most electrical items run off 110V. That isn't the case with every country. Find out if your client will need to bring a converter to safely plug-in while they're in-destination. Familiarize yourself with how the client can call home during their trip.





U.S. Department of State (DOS) website

The [international travel section of the Department of State's \(DOS\) website](#) is a lifesaver for any travel advisor,



U.S. Department of State (DOS) travel advisor alerts

Make sure to [sign up for the DOS's travel advisory alerts](#) for your clients' destination.



U.S. Department of State (DOT) STEP Program

For international travel, register your clients with the local US consulate office through the DOS [Smart Traveler Enrollment Program \(STEP\)](#).



CVENT CVB directory

Convention and Visitor Bureau (CVB) directories for every major region of the world: [Africa](#), [Asia](#), [Australia](#), [Canada](#), [Caribbean](#), [Central America](#), [Europe](#), [Mexico](#), [South America](#), [United States](#).



DuoLingo

[Free online language learning website](#)



CHAPTER 22 | Building Itineraries

After you've finished your research, it's time to present your findings to the client. How exactly do you send over a quote or itinerary? Well, every advisor is going to do it differently and have their own little spin on how they do it.

And so that about wraps up this section . . .

Just kidding. I'll give you more than that to work off of.

There are four main ways travel advisors show off their hard research to clients. Let's take a look at them.

Supplier Itineraries

When an advisor books with a supplier, the supplier often provides the functionality for the advisor to email itinerary options to their clients. In the upcoming interactive chapters, you'll be able to watch videos of advisors in the booking portals and can see first-hand how easy it is to send over quotes to your clients via supplier portals. It's as simple as building the trip and entering the client's email address.

You'll want to **keep in mind that with supplier itineraries, you're not able to customize the look, feel or main contents.** While it will have your agency's name and details, the most prominent brand is that of the supplier/vendor.

The other downside? It pretty much gives the keys to the kingdom (flight numbers/times, hotel category, tour operator used, etc.). For some advisors, that can be worrisome since the client can take the information and easily book it on their own. While the hope is that the client has experienced your expertise and

value by this point, some advisors hold back details for newer clients until they are further along in the booking process.

If you send the itinerary through a supplier portal, always send a follow-up email to the client letting them know to expect the itineraries. If the email disappears into cyberspace, the client may think the advisor has dropped the ball and never sent the quotes over.

If you send the itinerary through a supplier portal, always send a follow-up email to the client letting them know to expect the itineraries.

For agencies that want the ease and automation of supplier itineraries, but want the supplier documents to be branded to their agency, Doc Brander is a software that automatically redesigns the documents of major vendors to be branded to your agency. It does not allow for the removal of specific details of the itinerary but is free for up to 5 documents each month. (*Disclaimer: Doc Brander is my brother's company.*)

Itinerary Builders

Itinerary builders are the Cadillacs of this chapter. They are the most expensive option but darn do they have features up the wazoo, the ability to customize everything and just straight up look *gooooooooood*.

All of the builders have mobile apps (for your travelers on the go) and help you out by having a database of destinations with pre-filled content for you, as well as a library of images and videos to make your clients drool.

One of the cool features of itinerary builders is that they also allow you to interact and collaborate with your client within the program. They can comment on whether they'd like you to switch out a hotel or ask you if you can squeeze in a tapas reservation during a free afternoon. Nifty, eh?

Itinerary builders are a great option for agencies that are doing custom trips and/or want to prioritize the agency's branding and customer experience. There are a few players in the itinerary building market: [Axus](#), [IT Explorer](#), [Travefy](#), [Triplt](#), [Umapped](#), [Vamoos](#).

THE PLAYERS	Umapped	Travefy	VAMOOS	AXUS
BASICS				
Years Established	9	6	5	5
Update Frequency	Quarterly	Weekly-Monthly	Quarterly	Monthly
Products Offered	Itineraries, Quotes	Itineraries, Quotes	Itineraries, Quotes, Digital Bookings	Itineraries, Quotes
Travel Types Supported	All Inclusive Cruises, Group FIT	All Inclusive Cruises, Group FIT	All Inclusive Cruises, Group FIT	All Inclusive Cruises, Group FIT
PRICING				

Your agency may or may not have a travel itinerary builder in place. If they don't, here's a comparison of the different itinerary building programs.

DIY Itineraries

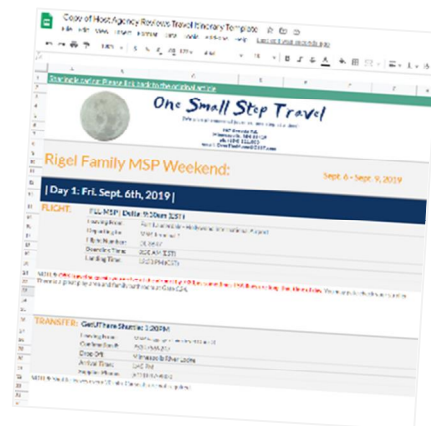
Some agencies choose to go the DIY route and build their own itineraries. Before travel itinerary building apps automated things and allowed for customization, agencies would create DIY itineraries in Word or Excel.

While not as slick looking as the itinerary builder and lacking the collaboration or automations you find in an itinerary builder, the DIY itineraries do allow you to brand it to your agency and customize it to your heart's content. These DIY itineraries are attached to an email to your client, typically as a Word, Excel, or PDF. Creating it as an attachment gives you more formatting and design freedom than a straight-up email. It allows you to add some creative flair-like images, your brand colors, embed videos, etc.



DIY itineraries are a great option for smaller agencies that are willing to swap out sweat for cost savings. You can create a template and all that is needed for each trip is to fill in the specifics!

In the supplemental resources at the end of this chapter are some examples of free Google Doc travel itinerary templates.



Good Ol' Copy and Paste Itineraries

Last but not least, is the tried and true method of copying and pasting the info into an email. You can copy and paste the supplier itinerary, taking the time to remove any itinerary details or supplier branding, and then send that over to your client in an email.

SUPPLEMENTAL RESOURCES



Itinerary Builder software

[Axus](#), [IT Explorer](#), [Travefy](#), [Triplt](#), [Umapped](#), [Vamoos](#)



Host Agency News

A [comparison of the different itinerary building programs.](#)



Host Agency News

Access to of [free Google Doc travel itinerary templates.](#)



Doc Brander

[Doc Brander](#) is a software that automatically redesigns the documents of major vendors to be branded to your agency.

SECTION TWO

Interactive Chapters



CHAPTER 23 | Booking

Booking a trip: This is where the rubber meets the road. The good news is that with the knowledge you've acquired up to this point, you have already laid the foundation to book a great trip: you know about qualifying clients and suppliers, you know about creating itineraries and you know about the need to chat with your clients on budget.

But what do you, I mean actually *do* once a client takes the leap to book with you? That's what this chapter will cover.

But before I get deep into booking logistics, I want to back up and explain how it's different to book as an advisor than it is to book as a consumer.

Booking as an Advisor vs. Booking as a Consumer

Once you become an advisor, you'll have access to advisor portals from suppliers that are *not* available to the general public. Having an accreditation number is what grants you this access (but you know all about that already!)

Here's a few examples of how booking a trip as a travel advisor is different than booking as a traveler:

1. Travel advisors hold space on trip packages

before paying for it: It might not surprise you to hear that I can go on Expedia and hold a berth on [enter just about any cruise line here] without giving up some credit card digits. But with certain suppliers, travel advisors can hold space on some trips with just a traveler's name. (*The name cannot be changed so make sure you have the legal name on their ID!*)



2. Travel advisors hold airline tickets: When you book air, a travel advisor can hold both the fare and the space usually at least until the end of the day (the fare rules will let you know if you can hold it longer). This is a **HUGE perk** . . . especially if clients want to hold a great fare but need a little wiggle room to coordinate with other travelers or take time to confirm details. Can you do this as a standard consumer on airline websites or online travel agencies (OTAs)? Nope.

3. Travel advisors make a deposit to hold a trip and they can pay in installments: This is a big deal. Not only can travel advisors hold space and airfare without booking, but they can also put a deposit on the trip without paying for the entire stinking thing at once.

This means that the \$3-10k+ someone might pay for a trip can be stashed away in a high-yield bank account (do those even exist anymore?) rather than used to pay for a trip they're not taking for another 9+ months.

Doesn't \$416.67/mo. sound less scary than \$5,000? It sure does to me. Does this take a lot of tracking and organization? Yes. Travel advisors track deposit and deadlines and final payments deadlines to make sure any booking crisis is averted. But guess what, it's a part of the job (and value you offer to travelers).

4. Travel advisors use an accreditation number to book: Sigh. Yes, I am repeating myself. But you know, an accreditation is what anoints you as an advisor. It offers advisors access to special booking portals that aren't available to the general public. Yes, it's the key to the kingdom. The holy grail. (You catch my drift). This is a big one (and worth repeating).

5. Advisors can book more complicated trips on a supplier portal: Dare your clients to go on Expedia to book hotel rooms for 8 adults, 3 toddlers, two teens. Oh, by the way you want one room with two bedrooms (one with two queens, one with a king), *and* a king studio suite with a privacy wall. Good luck with that!

Travel advisor portals offer more information and flexibility to see what's available

and can accommodate more complex groups. When groups get bigger, booking becomes even more complicated. But you know what helps with this . . .

6. Advisors develop strong relationships with travel companies: On top of having access to travel-advisor-only booking portals, travel advisors (yes, you!) will also develop strong ties with different travel companies.

These relationships are a huge benefit when it comes to booking large groups or more complex trips (or any trip, really). It helps you support clients if something goes awry during their trip. Why? These travel companies are extra motivated to be responsive to advisors since you book a higher volume than Jane Doe. Not only that, but advisors also may get access to certain perks and upgrades on their portals.

7. Travel advisors have access to commissions, perks, and upgrades: I often try to underplay this fact because I don't want to mislead prospective advisors into thinking an accreditation number is a fast track to free travel and wholesale discounts. But . . . there are definitely perks.

On these magical supplier portals, advisors can see what commission, perks, and amenities they can earn from different types of booking. This way, you can weigh booking a trip that is optimal for your client and for you.

8. Travel advisors can price match: It's a myth that a trip is automatically going to be more expensive if you book through an advisor. Some suppliers allow advisors to submit a price match if your client comes with a lower price-point for the (exact) same package. Are you going to spend 10 hours trying to save \$20 on a \$8,000 trip? I sure hope not. But at the end of the day, you *are* going to ensure that travelers get the best value and are happy with your service.

This is what sets you apart!

(If you need any reminders of how amazing you are, [look at this infographic.](#))

Let's stop here and apply what you have learned. The following pages are exercises for you to apply what you have learned. You can either print the following pages or/and what I would do, use a Google Doc or other word-processor type software to do your exercises.

Steps to Booking a Trip (11 steps)

Let's walk through the steps you'll take when you book a trip (Steps 1-4 are giveaways because we've already covered them):

1. Qualify your client: Check. You know all about this.

Your client would like to visit Ireland. **In the space below, write down 10 questions you would ask to qualify your client.**



1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

2. Have some real talk about budgets with your clients: On it!

In the space below, describe how you would ask a potential client about their budget.



**INTERACTIVE
ACTIVITY**

3. Qualify your suppliers to build an itinerary: Once again, you are ON A ROLL!

If you are booking a cruise, **in the space below write down what are 3 things to consider to ensure the ship is a good fit for your client?**

1.

2.

3.



**INTERACTIVE
ACTIVITY**

If you are booking a tour package at an all-inclusive resort, **what are 3 things to consider to ensure the resort is a good fit for your client?**

1.

2.

3.



**INTERACTIVE
ACTIVITY**

If you are booking a standalone air ticket, what are 3 things to consider to ensure the flight is a good fit for your client?



1.

2.

3.

4. Offer your client travel insurance (and document it): Yep, you know the drill

Why is it so important to document that you offered the client travel insurance?



1.

2.

3.

5. Gather the info you need to book: Here's where we slow our roll. Once your client gives you the green light, this is the basic information you'll need to book the trip:

- Accreditation number
- **Client's credit card info (including expiration date and security code)** (unless you're just holding the booking, in which case they may not need it quite yet!)
- **Client's passport number** (international travel only)
- **Client name exactly as it appears on the cc card** (especially if it doesn't match what the advisors have on file)

- Client's billing address and phone number
- Any of the **clients' reward program numbers**, as they applies to different vendors
- **Agency (or host agency) phone number:** This is mainly if you're calling in to make a booking.

6. Put the booking on hold: Just like it sounds. (Steph, Should the other sentences have numbers too)

7. Double check the details: Once you put in all those painstaking details, look at it with fresh eyes before you make that booking. Make sure you have all the details right (check out that list above).

And here's the thing, you *will* make mistakes. Every single travel advisor out there has. But taking the time to look at it with fresh eyes will minimize these mistakes and trust me . . . fixing a mistake when something is on hold is a heckuva lot easier than after you make payment.

8. Book it: Book! That! Trip

Wow. I make it sound so easy. This step is hard to chat about since

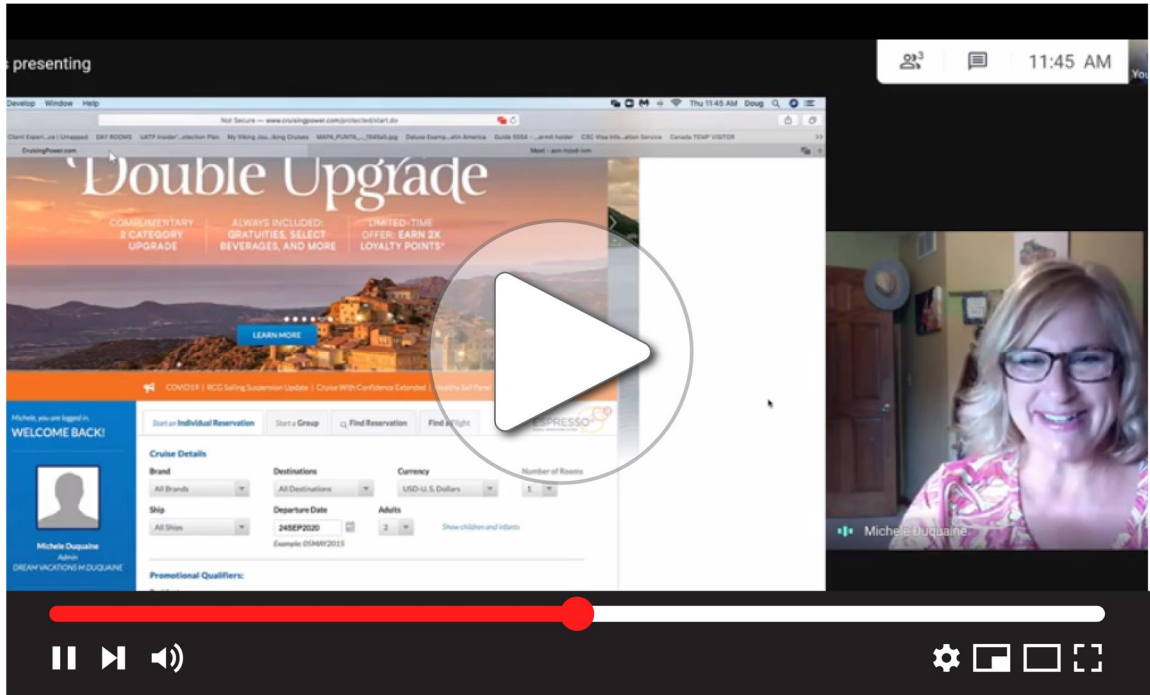
- a.) booking is part art, part science and
- b.) every supplier portal is different.

BUT don't worry. We have instructional videos on how to book different types of trips for GDS, cruise, and tour bookings! Crisis averted!

Meet Michele Duquaine, a top producing Celebrity Cruises advisor.

She'll give us a behind the scenes look at Celebrity's advisor portal and show us how she researches and makes bookings.

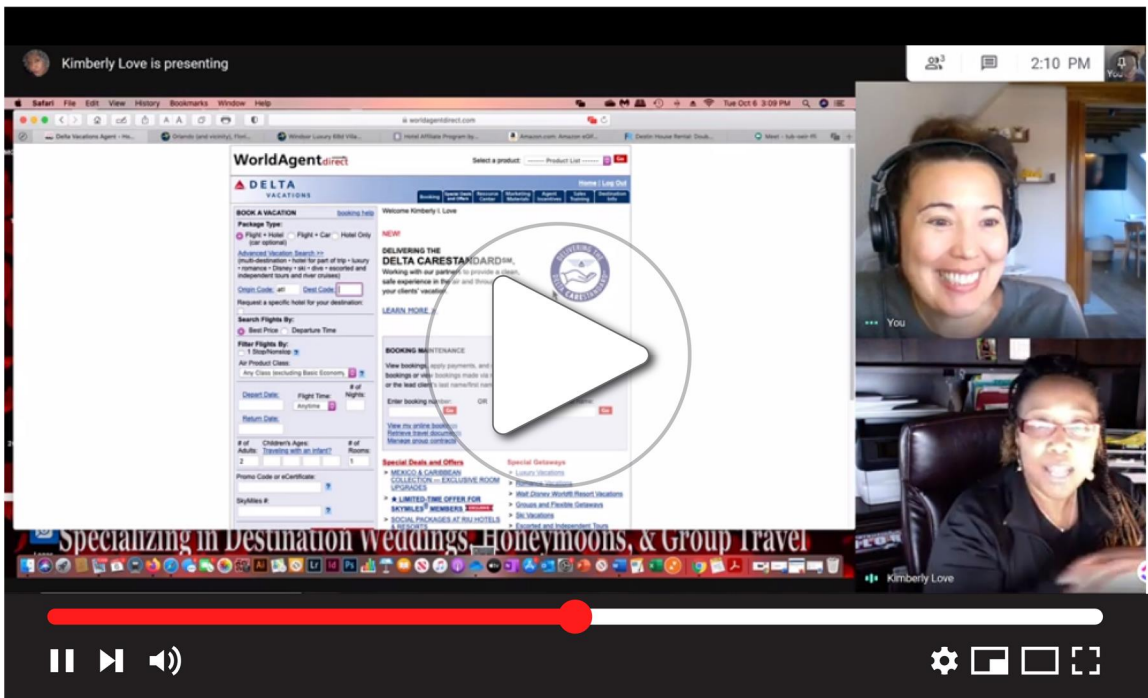
To view Michele's demonstration, please go to your course and select her video.



Meet Kimberly Love, power user of Delta Vacation's advisor portal.

We'll be taking a peek at her booking process for vacation packages.

To view Kimberly's demonstration, please go to your course and select her video.

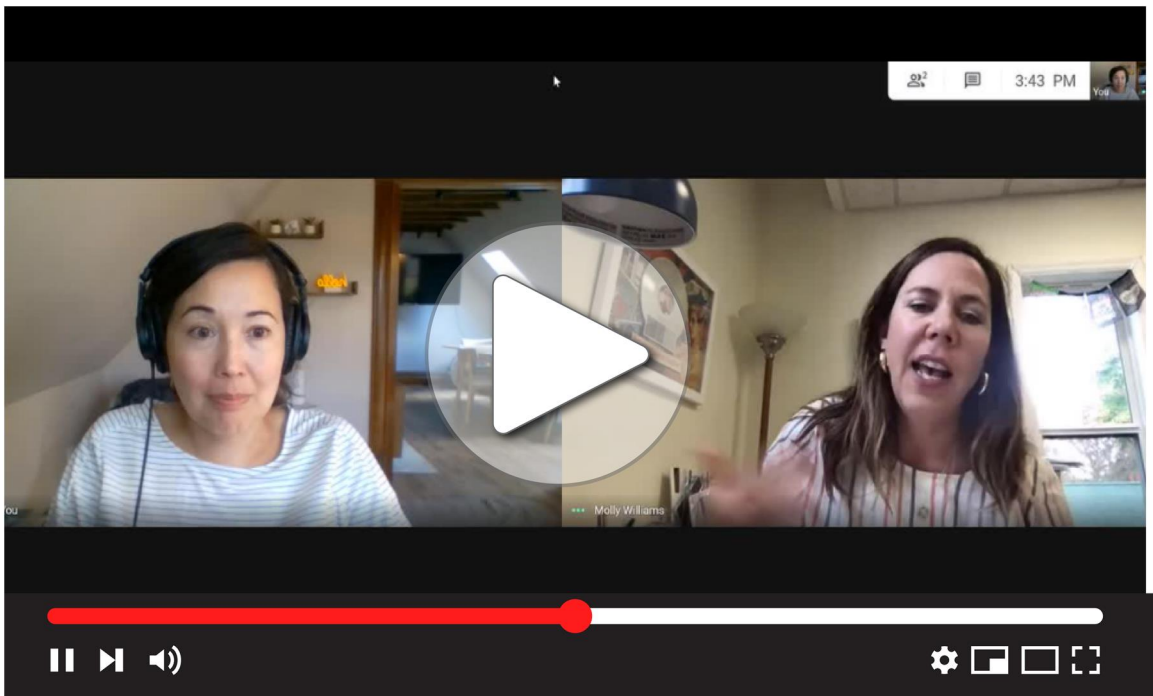


The image shows a video player interface. At the top, it says "Kimberly Love is presenting" and "2:10 PM". The main content is a screenshot of the WorldAgentDirect website. The website header includes "WorldAgentDirect" and "DELTA VACATIONS". The page is titled "BOOK A VACATION" and features a search form with fields for "Package Type", "Origin Code", "Dest Code", "Search Flights By", "Air Product Class", "Depart Date", "Flight Time", "Return Date", "# of Adults", "# of Children's Ages", and "Phone Code or eCertificate". A large play button is overlaid on the search form. Below the search form, there are sections for "DELIVERING THE DELTA CARESTANDARD", "BOOKING MAINTENANCE", and "Special Deals and Offers". The video player has a red progress bar and playback controls at the bottom.

Meet Molly Williams, an entertainment travel specialist that spends her days in the GDS, ferrying singers like Britney Spears and their crews to concerts around the world.

You'll get a look at the pretty side of the GDS, as well as the traditional side.

To view Molly's demonstration, please go to your course and select her video.



9. Send your clients the booking confirmation and

have them review the details: Once you make your booking, there will be one confirmation for you, the advisor, and many suppliers will have a separate one for you to send the client (one without your commission).

Be sure to send over a trip details confirmation form to document that the client has looked over their booking details, was offered travel insurance, and understands the necessary documents to travel. A sample trip confirmation is in the reference section at the end of the chapter.

In the space below list, in detail, all the things a trip details confirmation form confirms. (Hint: Click the image of the email confirmation)



The image shows a sample 'Trip Details Confirmation Form' from 'Your Journey Here'. The form includes fields for Name (First and Last), Email, and Trip Confirmation Number. It also contains a section titled '1) Did we get everything correct?' with a note about insurance and a 'Passenger(s) Details' section with checkboxes for name accuracy, ID accuracy, and passport validity.



**INTERACTIVE
ACTIVITY**

10. Fix any mistakes: You probably won't need to do this, but as it goes with booking, you should remedy an error as soon as you discover it. So, don't waste time feeling embarrassed. If you mis-entered info or missed a deadline, work immediately toward resolution. Problems like these will only snowball.

11. Enter all the info into your trusty CRM and/or accounting software:

Every agency will have a different method for this step but the main idea is you need to record that you made a booking. This makes it so that when the commission comes in, the booking can be paired to it and closed out. Recording the booking also makes certain your colleagues can find the booking information and assist your clients if you're out of the office or busy. Do this step right after your booking so you don't forget.

And that's the big-picture look at booking! Below we take a quick look at some of the big GDS players and other common travel agency software.

Major Booking Portals & Other Software

Before I launch into these programs, I want to offer a caveat: Different types of advisors will use different kinds of programs. If you become a leisure advisor, there's a good chance you'll never touch the GDS (Global Distribution System).

If you become a corporate advisor, where you might spend 90% of your time on the GDS system, you may never book a cruise.

There are booking portals aplenty. Ultimately, you will familiarize yourself with your favorites and become a jedi-level master of using those specific programs. *Until that day, below are just a few examples.*

Here's a few broad, sweeping strokes of what's out there.

GDS (Global Distribution System)

We've touched on the global distribution system (GDS) throughout the course but since it's a central booking portal, it warrants going over again.

The GDS is a travel advisor's motherboard for booking airline tickets and other sorts of travel goodies (like hotel and car). They are essentially the go-between for (a whole lotta) travel agencies and (a whole lotta) airlines. GDS systems offer advisors direct access to airline inventory they wouldn't otherwise have.

There are five main players in the US GDS market. These companies focus on different geographical areas and represent different portions of the market share when it comes to inventory. *Here's a few examples of GDS programs:*

Sabre (Semi-Automated Business Research Environment): Established in 1960, Sabre is an U.S.-based GDS system, and also owns Abacus, the largest Asian GDS. Sabre is the brainchild of American Airlines and IBM. Today Sabre provides content from over 420 airlines, 1M hotels, and a few dozen car rental and railway companies. Aggregated, they represent over 38% of global market share in terms of distribution.

Amadeus: In 1987, Amadeus was founded by Air France, Iberia, Lufthansa and SAS in order to connect providers' content with travel agencies and consumers in real time. They were developed as the European alternative to Sabre and today continue to be the biggest player in European travel distribution. They offer a catalogue of 490 airlines, 770,000 hotel properties. They represent approximately 44% of global market share in terms of distribution.

Galileo, Worldspan, and Apollo: These three GDSs are owned by the parent company Travelport. They have grown into markets including India, Latin American and Asia Pacific. They represent the smallest market share, 400+ airlines and 650,000 hotels (plus car rental and railway).

GDS is one of many ways to book airline tickets. In general, GDS is typically used by advisors who book a high volume of air or hotels (e.g., corporate travel advisors who book a lot of business travel). It's less likely that a leisure advisor will have a need to learn and use the GDS.

Using GDS requires training and most new advisors will not have direct access to book via GDS. If you want an entire spiel on GDS including an overview on who needs it and who doesn't, you can check out the resource in the supplemental reading at the end of this chapter.

VAX Vacation Access

Vax is a booking hub dedicated to leisure advisors who want to book vacation packages, hotels, resorts, cruise, air, guided tours and more. It's a conglomerate of 55+ leisure suppliers, providing exclusive access to advisors.

ClientBase

At its most basic, **ClientBase is the largest (and oldest) customer relationship management (CRM) system devoted to travel advisors.** Here you can create detailed profiles for customers, vendors or other relevant industry professionals.

Also, you can create and sort detailed client profiles including PNR (passenger name record). The CRM also allows you to track special dates such as anniversaries, birth dates and keep notes for clients's specific preferences. And I'm just touching the surface of what this beast can do!

You can leverage the CRM to hone your client communications, trip planning and marketing efforts.

And that's it, folks. I want to reiterate that these summaries really just gloss the surface. When it comes to technologies, it's really best to take it for a test drive yourself.

SUPPLEMENTAL RESOURCES



Host Agency Reviews

[Infographic and article about using a travel advisor vs. booking online.](#)



Host Agency Reviews - sample email confirmation

[Templates and forms customizable and printable.](#)



VAX Vacation Access

[VAX tutorial](#)



Host Agency Reviews

[What is Global Distribution System \(GDS\).](#)



CHAPTER 24 | During the Trip

Once the boarding door shuts and your client is off to their destination, does that mean your work is done? Not quite. As part of the duty of care, travel advisors need to still be on hand to assist travelers during their trip. Sometimes things come up.

We've already talked about the importance of offering travel insurance. If your client purchased travel insurance, send a reminder prior to their departure recapping their policy number and the number to call (domestic and international) if they run into any problems. Let them know that the insurance provider's support team is there for them anytime, night or day.

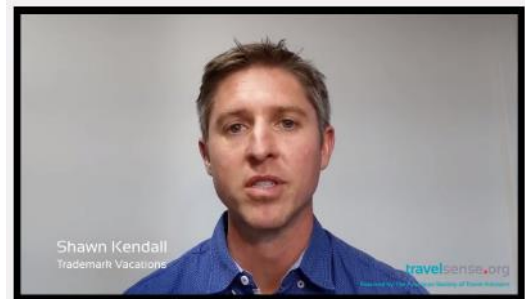
Along the same vein, send your client off with the supplier's in-destination help number. Let them know again that those lines are answered 24/7, 365 days a year. Of course, you're there to help too, but these numbers assure your client can get a hold of someone to help no matter the time of day.

While your clients don't want you to be like the disruptive waiter that checks in a *zillion* times during a meal, they do want to know you have their back. Discuss with your clients prior to leaving what their preferred communication method is during travel. Is it phone? WhatsApp? Email?

Your clients may reach out to you during their trip. Maybe their hotel room isn't satisfactory, and the front desk is telling them there are no other rooms available. This is where you use the leverage of your agency/consortium to step in and help. You'll work with your vendor to find a suitable solution for your clients, whether it be a voucher, a move to another room or an upgrade to a nearby property. And you're doing all this while they are sitting at the bar or relaxing on the beach.

The other role an advisor plays during travel is you're monitoring your client's trip for them, proactively looking to smooth over any bumps. How about we run through some things you'd want to be watching out for:

- **Flight delays:** If you see a delay, contact the client and let them know you are aware and monitoring. If they have a connection and it looks like they're going to miss the connecting flight due to the delay, inform the client you're already working on booking them on the next available flight before it fills up.
- **An airline strike:** As the advisor, you want the client to hear about an airline strike from their advisor, not when they're at the airport check-in counter. Assure them you're aware of the strike and are currently looking at the best rebooking options for them.
- **Weather:** It doesn't only cause flight delays; serious weather conditions can cause problems for clients in-destination. When Iceland's Eyjafjallajökull (say that ten times fast!) volcano erupted in 2010, advisors worked hard to accommodate stranded travelers.
- **Civil Unrest:** This one is easy-peasy since you signed up for the DOS's travel advisory alerts for your client's destinations! If anything pops up, you'd know right away and be able to start making arrangements to keep your client safe.
- **Pandemic:** In 2020 the world was thrown upside down with COVID19. ASTA collected an amazing group of stories of how travel advisors can to the aid of travelers all over the world. The image to the right will take you to a collect of travel advisor stories on how they helped their clients to get back home when countries started to close down.



Follow these tips and you can sleep sound, knowing that even if disruptions occur, your client's experience is going to be smooth as butter because they chose to work with a travel advisor.

Write an email/text you would send a client in-destination who is departing 6 hours from now and you just found out they have a flight delay of 2 hours.



**INTERACTIVE
ACTIVITY**

A large, empty rectangular box intended for the user to write their response to the prompt above.



**ASTA's Consumer website -
TravelSense.org**

[ASTA collected an amazing group of stories of how travel advisors can to the aid of travelers all over the world.](#)



Travel Weekly - Travel Trade Industry Publication

[Article about how advisors assisted clients during major weather events.](#)



U.S. Department of State (DOS)

[Sign up form for DOS's travel advisory alerts](#)



CHAPTER 25 | After the Trip

Your post-trip support is going to be easy-peasy because you've gone the extra mile in qualifying your client, booking their trip, and supporting them during their travel! High five to due diligence!

But as you well know, this is a service-oriented profession and you don't want to ghost your clients (even if they were over the moon with the trip you planned).

Here's a few tips on how to keep in touch with clients in the wake of their amazing vacation!

Post-Trip Client Communications

Following up with a client regarding their trip not only demonstrates your amazing service, but it provides you with invaluable information. Think of it as a second-hand FAM. Knowing how your clients experienced a destination is as important as (if not more important than) your experience of it.

When you do your post-trip communications for leisure clients, be sure to ask them about every aspect of their trip including:

- **Transportation:** Flight, shuttle or transfer services, car rental, rail or any other transport you booked (private helicopter service, maybe?!). How was the service? Were they prompt and responsive? Was the communication smooth? Were amenities or extras provided? Would you recommend this service to other travelers? Did you feel the benefits outweighed the cost?
- **Lodging Accommodations:** Resorts, hotels, private rentals, cruise, lodge, etc. You can cover any aspect that was included such as dining,

facilities, activities, entertainment, service, cleanliness and appearance and more.

- **Trip Activities:** Were they what your client expected (e.g., did the easy hiking tour end up feeling like an ultramarathon?)
- **Highlights/Lowlights:** What was their favorite part of the trip? What would change if they could have a redo?
- **Any recommendations?** Did they find any hidden gems at their destination? An amazing show or restaurant? A gorgeous hike or beach off the beaten path? You can learn a lot of great insider information from your clients.

Those are just a few things you can chat with them about post-trip. Not only is it a way for you to get insider info on a destination, but clients will love to share their experience. Additionally, if you find out that anything went wrong, it gives you an opportunity to fix it (more on that later).

But what are ways you can engage with clients after their trip is all said and done? Here's a few ideas for reaching out to them:

- **Engage with them on social while they're on their trip:** Did you notice what I did here? I cheated because this isn't technically post-trip. BUT it's kind of the runway into post-trip communications. If your client is on social media posting dream pics of a vacation you planned, interacting with them is pure gold because their networks may see that you're the wizard behind the curtain who planned the trip. (Plus you can ask to use their photos or post content for your site.)
- **Follow up with a Post-Trip Survey Form:** This is a step I do recommend every advisor take. Send a post-trip survey while the vacation is still fresh in their mind and they're excited to talk about it. Sending a survey is a great way to get as much info as clients are willing to share. (You can find an example of a [Post Trip Survey form here](#))
- **A phone call:** Does anyone use phones anymore? Advisors do. Start with an open-ended question, "What were the highlights/lowlights of

your vacation?+or, %dknow when we were planning your trip you were most concerned about [*whatever they prioritized in their vacation*], did [*supplier*] meet or exceed your expectations?+The good thing about chatting in person with your client is youd| get a better feel for their experience.

- **Send a “Welcome Home” gift or note:** Sending a client a small note or gift welcoming them home is a sweet gesture. It could be a stress ball or chocolate to help transition them back into reality; a funny %owish you were there+postcard; or a photo from their trip made into a magnet. Doesnq have to be elaborate or fancy. Just a small gesture to know that youqe excited to hear about it.
- **Ask them to write you a review:** When you follow up with your clients, they will often gush about how amazing you are. If they ask what they can do, let them know that spreading the word through reviews is the gift that keeps on giving. Send them a link to where they can leave a review.
- **Send a birthday/anniversary special occasion card:** I still get a card from my dentist every year on my birthday. Now imagine if a client received a card marking a special occasion from someone that provides a service they actually enjoy! It lets them know youqe thinking of them.
- **Follow up 6 months to a year after their trip:** By the powers of your CRM, youd| %remember+when your client took their trip. On the anniversary (or half-year anniversary) or their trip, send them a photo or note about their vacation. Kindle their nostalgia. Let them know you canq wait to plan their next trip (if you havend| already).

Itsq not necessary to do all of the bullet points listed above, theyqe simply ideas to develop strong relationships with your clients. The important thing is that your client experiences some connection with you even when theyqe not traveling. It will be something that keeps you front of mind.

Give three ideas for how you would follow up with grandparents who used you to book their entire family on a trip to Disney World.



**INTERACTIVE
ACTIVITY**

A large empty rectangular box for writing the response to the prompt above.

SUPPLEMENTAL RESOURCES



Host Agency Reviews
An example of a [Post Trip Survey form](#)

SECTION THREE

Finding Employment Chapters



CHAPTER 26 | Working for Yourself

The first branch in the road you'll come across as you start your travel career is deciding if you want to work for someone else or start your own travel agency. Naturally, it's a bit easier if there is an employer that will train you on the ins and outs of selling travel. However, there are plenty of advisors that take the route of starting their own agency, without any experience. It can be done, but it's a whole different ball game.

In these next two sections, let's walk you through the pros and cons of each route so you can start to explore which option is best for you.

Entrepreneurship: What to Expect

There are multiple things to consider when you're thinking about becoming an entrepreneur. The most important thing is not a passion for travel or even experience as a travel advisor, it's mind set. Do you have the mentality of an entrepreneur?

Entrepreneurs are self-motivated first and foremost. They are adaptable and excel at seeing both the big picture and knowing how to implement the details. They are flexible and quick thinking, responding to the challenges that inevitably pop up. They have a passion for what they do and confidence in their ability to bring their vision to life. They work hard and are great at selling their product or service. You also need to be okay with risk.

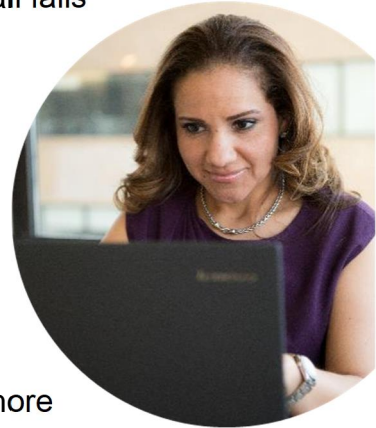
Take it from me, it's no cakewalk to start and run your own business. There is a lot of sweat and tears before you even get close to your moments of glory. But seeing your vision come to reality and having a platform to creatively express your ideas without the constraints you'd have if you were an employee — well that just might be worth it for you.

And while I'd like to tell you that when you start making money is when the cakewalk begins, that's not the truth. Starting a business is challenging and running a business is equally as challenging.

When you own a business, you're responsible for not just the main service (booking travel, in your case) but also marketing, accounting, sales, IT. Pretty much every task from the CEO's responsibilities to the janitorial staff; it all falls on you.

Of course, the positive side of this is that once your business is up and running, you have something to show for your work. If you're a driven person, you'll have another fun challenge ahead, making your business successful!

Some of you may already be like, "No way. Not for me. I'd take the stability of a paycheck and being able to clock out so I can enjoy my weekends!" But no doubt, some of you are intrigued and want to know more details about what you can expect as a travel agency owner and how to make it happen.



Travel Agency Startup Cost

Every year, Host Agency Reviews (HAR) gathers data on travel advisor income and publishes our travel advisor income reports. As part of that survey, we take a look at the segment of new advisors and ask them how much they've invested to get their travel agency off the ground.

HERE'S A SNEAK PREVIEW:
17%: The amount average income increased from last year
46% of agents that reported an increase in sales from previous year
74% of agents who worked FT
66% of agents felt their compensation was fair
94% of agents were home based
21% of hosted agencies reported having Independent Contractors
87% of hosted agents identified as women
56: Average age of this segment
15: Average years of experience among this segment

Industry research shows the average investment to start an agency is \$3,170. This includes things like business registration fees, buying a domain and setting up your website, business cards, logo design, marketing, host agency fees, regulatory fees, etc.

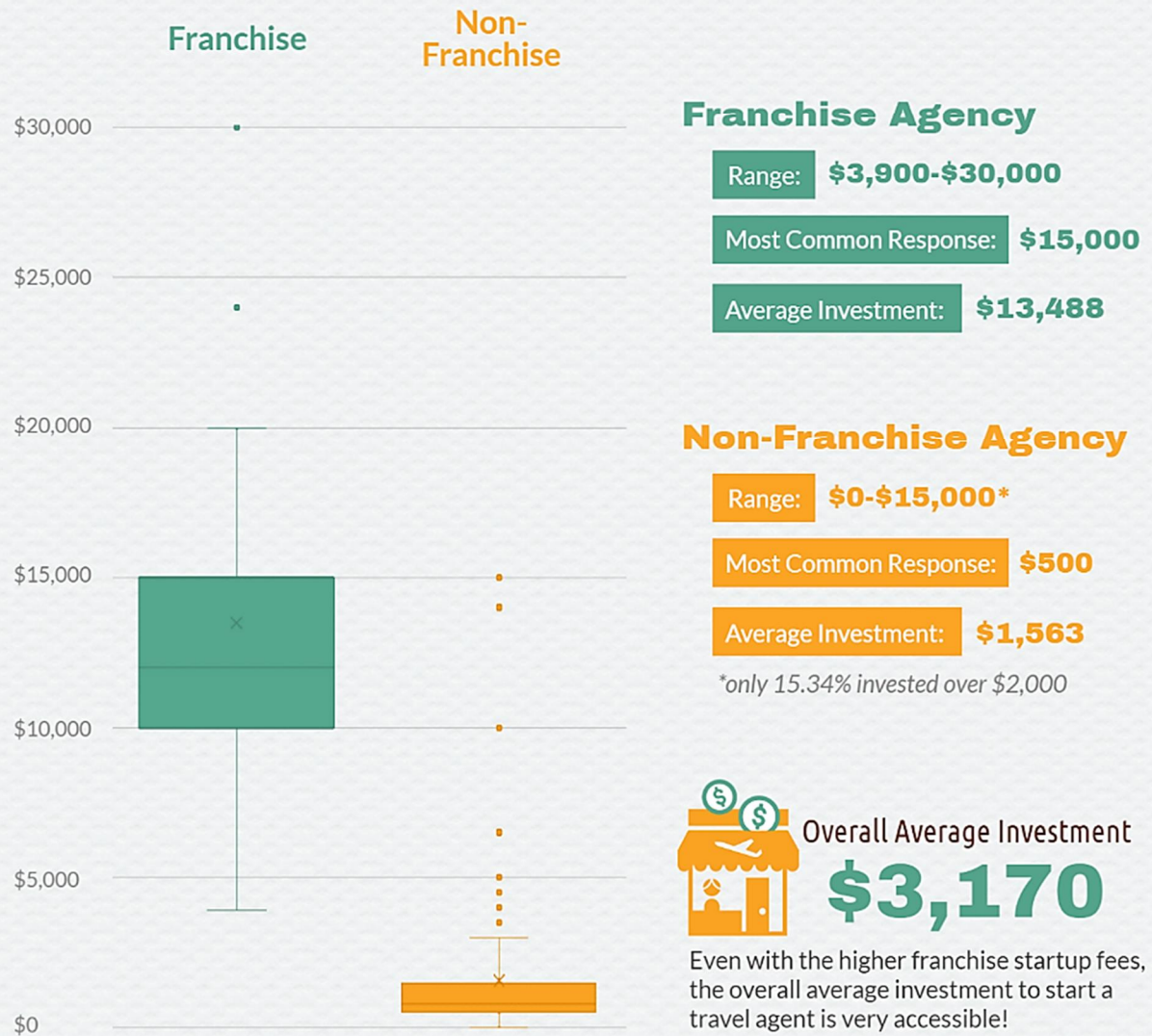
The average investment to start an agency is \$3,170.

If you're turned off by the \$3,170 average, I have some good news for you. That's the average when we look at all travel agencies, franchises included. The thing with travel agency franchises is that they cost quite a bit more than creating your own brand. So, if we were to look at agencies that weren't paying \$10-30k for a franchise, you'd see that the startup cost decreases significantly to an average of \$1,563! Not too bad for starting up your own company, eh?

On the next page is an infographic that drills down more on startup costs

Average Startup Costs

Since there is such a disparity between startup costs depending on if you join a franchise or not, we decided to split up the results to more accurately represent each sector.



Income Expectations

Knowing our startup costs naturally leads a good business person to ask, "Ok, so I invest \$1,563 in my travel agency. What's my earning potential?"

It used to be impossible to get data on the earning potential of a new agency. It's wonderful to have people interested in our industry but if there is a high failure rate due to business owners not understanding the trajectory of the business, well that's a problem for not just the business owner, but the industry at large.

The average income reported for new advisors (non-employees) in 2019 was \$7,875.52

Before you think that's insane, there are a few things to help explain the low income your first few years:

- **Finding clients takes time.** You probably aren't going to open your doors and automatically have a steady stream of clients you're booking. It takes time to set up your agency and learn the industry before you feel comfortable marketing.
- **Commissions are only paid to advisors *after* the client travels.** Today, commissions are often paid to advisors after the client travels. So, if you start your agency in January, launch in March and get your first booking in April, if they're not traveling until January of the following year, that commission won't be paid until a full one year after your agency opens. The American Society of Travel Advisors (ASTA), as the trade association advocating on behalf of travel advisors, strongly feels and continues to push to have commissions paid within 14 days of final payment, not date of travel. Ideally, this issue will become less of an issue over time. So, if you start your agency in January, launch in March and get your first booking in April, if they're not traveling until January of the following year, that commission won't be paid until a full one year after your agency opens.
- **Travel is a high-ticket item.** It's not like a restaurant where you'd get repeat customers multiple times a month. You may book travel for a leisure client 1-2 times a year. Repeat and referral clients grow exponentially over time, but it takes time.

For all of the reasons above, the majority of new agency owners work part-time on their agencies for the first few years. However, if you focus full time on your agency the first year, the average income doubled, with FT advisors reporting \$14,200.63 in 2019.

Regulations, Taxes, Business Structures

If that isn't the most exciting heading of this course, I'm not sure what is!

As you can imagine, for a business owner that loves to sell travel- which is so dynamic and exciting- the finance and legal side of the business is often the bane of their existence. But it's a reality and one of the less exciting parts of being a solopreneur.

We're not going to dive deeply into this section because it's the equivalent of a big black hole that we'll never escape from. But, if you are wanting to go black hole diving, the good news is *ASTA's course Finance and Accounting for Travel Agencies* is a great place to get started.

Here are a few the things you need to be aware of if you're thinking about becoming a travel advisor entrepreneur:

- **As the business owner, you are responsible for paying all the taxes.** Right now, if you look at your paycheck, you can see your employer pays some of the taxes for you. Guess who pays the employer half (and employee half) when you're the business owner? Yup, you. Plus, you're responsible for your own health insurance and more.



[Here's a more in-depth dive into quarterly taxes.](#)

- **The buck stops with you when it comes to having the proper licenses and registrations.** Your agency may need to get its own Seller of Travel license, register your business with the state and keep those updated. It's not necessarily hard, but it can be tedious. And it's definitely not fun.
- **You'll need to choose a business structure for your agency.** There are a variety of business structures out there, each with their own advantages and disadvantages. You can choose to be a sole proprietor, partnership, LLC, or a corporation. Most new advisors choose either a sole proprietor or LLC.



[Read up on the different business structures and see which might be best for your travel agency.](#)

Interview with Travel Advisor, Zachary Russell

[Zachary Russell's story and insights](#) about setting up his travel agency.



Interview with Travel Advisor, Iris Martin

[Iris shares her story about building her independent contractor business](#), what mistakes she made, what she did right and how group travel has her living her best life. This is a fun interview to listen to.



Host Agencies for New Advisors

As the founder of Host Agency Reviews, it shouldn't surprise you that I'm a fan of the host agency set up. But there's a reason why I'm a fan of this set up for new advisors. Being a solopreneur can be a lonely experience if you aren't able to find a community to help you blossom. A good host agency as well as membership with ASTA will give you the community and mentorship that is so important as you get started.

While the consortium model is best if you are entering this industry by buying an existing travel agency or your business model is something far greater than working for yourself. *Let's do a quick refresher here: A consortium is a group of independently accredited agencies that bind together to streamline their agencies. They used their combined buying power to negotiate better deals for*

their members on commissions, technologies, marketing, etc. The challenge with the consortium model is that you when you are just starting out, well you are just starting out. You don't have a volume of sales and a long list of clients. See the problem? Hard to have sales under your belt when you are new to the biz! So, for all intents and purposes that rules out a consortium membership in the early years of being a travel advisor. Of course, if you get employed as an advisor within a travel agency, that agency will most likely be part of a consortia.

If instead you take the route of an independent contractor (IC) i.e., working for yourself. And you are like many new advisors who want to belong to a larger group to access the economies of scale. Then that, my friend, leads you to a host agency.

Let's go ahead and quickly review some of the benefits of aligning with a host agency:

- **Bookkeeping:** A host agency should play the role of a part-time bookkeeper at your travel agency. That's a huge benefit of using a host agency. So, keep in mind part of your commission cut with the host is paying for a bookkeeper. They can run reports on the bookings you've made without you having to purchase any software. They will issue you commission statements and, at the end of the year, send you a 1099 with all your earnings. The more advanced hosts should allow you to look up bookings, run reports, etc. as part of what they provide.
- **Commissions:** A travel agency's commission level is based on their vendor revenue. A big benefit of using a host agency is that all of the advisors under that host are seen as one travel agency. If it's a decent sized host, the combined buying power should give you top commissions on all major suppliers.
- **Access:** The business development managers (BDMs) that work with travel agencies have large territories. One of the benefits of using a host agency is that hosts have already established relationships with these BDMs. Many hosts are most likely a larger account for the BDM. So, if you have problems with a booking, the sales volume and long-standing partnership of your host will, if necessary, allow the situation to be escalated through the host agency's channels.

- **Technology/Marketing:** One of the many benefits of using a host agency is that the top host agencies offer a whole arsenal of technology. Ask if they have a Customer Relationship Management (CRM) tool like [TravelJoy](#), [Clientbase](#) or [ClientEase](#). *Examples of programs commonly offered—often at a better rate than what you could get on your own—are direct mail programs, consumer website programs, corporate booking engines, etc.*
- **Education:** Host agencies are the top recruiters of the (much needed) new blood in the travel industry. Because of that, many host agencies will not only offer continuing education, but also a training or mentoring program. It's also common to see a host agency offer online training tailored towards new advisors.

ASTA (American Society of Travel Advisors) offers advisors educational courses which focus on business, ethics and the legal side of being a travel advisor.

- While it's possible to learn how to be a travel advisor without any formal training, a good training program can help you over a steep learning curve and help you start making money quicker. This is one of the major benefits of using a host agency. It's a great gateway into the industry. For experienced advisors, hosts often put together their own FAMs for continuing education and may partner with vendors to provide continual continuing education for their advisors.
- **Networking:** Being a solo travel advisor has its advantages, but one common complaint is the social isolation. A host agency that cultivates community can ease the isolation by helping you meet other travel advisors. These advisors are a great source of knowledge to help you build your business and support you as you grow.
- **Lower Startup Costs:** Another benefit of using a host agency is that host agencies are typically less expensive than going with a franchise or consortium. It's a great avenue for those new to the business or smaller agencies. Some hosts offer 100% commission plans but typically there is a commission split involved. Even with the split, the advantages of higher commissions and the benefits listed above make it worthwhile for many advisors.

- **Air Ticketing Support:** You've read about how booking stand-alone air can be more complicated than it seems. New travel advisors without experience will likely not have access to a GDS. Some (not all) host agencies offer airline ticketing support through their ticketing desks and consolidators.
- **Seller of Travel:** Navigating Seller of Travel (SOT) laws isn't exactly a walk in a park. There's legalese, red tape and the cost of getting licensing for SOT if your agency is located in (or you sell to residents of) CA, HI, WA, and FL. If you go with a host agency who is already registered for SOT under those states, they may be able to extend that licensing to you, the IC! This cuts down on red tape and provides more real estate in your brain for other issues- like building a client base or planning a group trip.
- **Errors and Omissions (E&O) Insurance:** Some host agencies will extend E&O insurance coverage to their ICs. If you decided to become an IC (e.g., work for yourself) you are able to get this insurance on your own.. This is coverage to protect agents from costly lawsuits in case a client holds you (the travel agent) responsible for something that goes horribly awry with the trip or booking.

SUPPLEMENTAL RESOURCES



American Society of Travel Advisors (ASTA) Accounting course

[ASTA's Finance and Accounting for Travel Agencies course](#)



American Society of Travel Advisors (ASTA) Member Host Agencies

[ASTA Host Agency Members have distinguished themselves from their competitors by abiding by ASTA's Code of Ethics and supporting the travel advisor distribution channel.](#)



Host Agency Reviews

[Host Agency Reviews](#) (HAR) the website created by Steph Lee, the author of this course.



Customer Relationship Management (CRM) for Travel Agencies

[TravelJoy](#), [Clientbase](#) and [ClientEase](#).



Host Agency Reviews

[Travel advisor income reports](#)



Host Agency Reviews

[You can read HAR's full article on travel agency startup costs here.](#)



Host Agency Reviews

[An in-depth article on quarterly taxes.](#)



Host Agency Reviews

[Articles on different travel agency business structures.](#)



Host Agency Reviews

[A 7 day program to setting up a travel agency.](#)



Audio Series - episode Vol. 2 of *Travel Agent Chatter*

[Zachary Russell's story about setting up his travel agency.](#)



Travel Market Report

Articles about being a solo travel advisor and [social isolation](#).



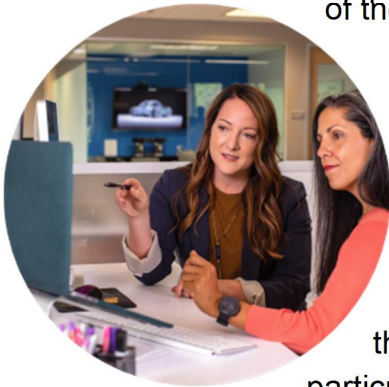
Host Agency Reviews

Article about [E&O insurance](#)



CHAPTER 27 | Working for Someone Else

Entrepreneurship isn't for everyone, which is great because there are plenty of positions that need to be filled at those companies the entrepreneurs started! We list a wide variety of travel advisor positions in Chapter 32 to help you get an idea of the employee roles available to a travel specialist.



One of great things about the travel industry is there are a variety of travel agencies you can potentially work with: from corporate to leisure, groups to solo travel, FIT to tours, adventure to luxury. The downside to that is with so many different niches, there is no one-stop travel advisor certification program that ensures a future employer that a new advisor has a base level of knowledge for that particular niche. That means you have to do more legwork to convince your future employer that you're worth investing in.

The good news is that you're here, proactively taking an ASTA course to prime you on the basics of how the travel industry works and that's huge! So, while you may not be proficient in the GDS (yet) and you don't have any real-life experience selling leisure travel, you are eons ahead of those that haven't taken this course.

ASTA offers the Verified Travel Advisor certification program, which you can take if you join ASTA as a student member. While the certification program is designed for professionals already working in the industry, it will show your future employer your dedication to becoming a travel advisor.

I bring this up because most companies, by nature, will prefer to hire someone with experience over someone without. But that should not dissuade you from following your dream!

Take a listen to how this travel advisor/aviation enthusiast was hired in WestJet's pricing and revenue department without meeting any of the qualifications. He later left WestJet to start his own successful travel agency.

Interview with ~~Travel Advisor~~, Airfare Consultant Lary Néron

[Lary's story is well worth listening to all again.](#) He explains how he is able to charge between \$165 - \$475 per ticket for international flights. Lary does not really sell airfare, he sells peace of mind.



Getting Your Foot in the Door

There are plenty of ways to get your foot in the door of your dream company. Let me talk you through some of them.

- **Find your dream companies.** Find a handful of companies that you think you'd really love working for. Getting your foot in the door and standing out is easier when you're truly interested and passionate in the position. Find a focus and get to know those agencies really well so you understand what they're looking for in their future employees and you can clearly articulate how you will be the perfect fit.
- **Make use of LinkedIn.** Do you have any connections at your dream companies? Reach out to any connections to see if you can chat with them about the company culture. Ask if they have any internal connections to HR or the travel department to give you an introduction. Make sure your LinkedIn profile is up-to-date and optimized for your dream position.
- **Book your travel with your dream agency and/or refer friends.** This is actually a huge way to get your foot in the door. After all, what an agency owner is looking for most is someone that can help build the agency's revenue. They want an advisor that is good at selling. If you're

already bringing them business without being on the payroll, imagine what you can do when you're part of the company!

- **Ask to shadow or intern.** Perhaps you don't have all the qualifications the company is looking for and they're dead set that their new hire has them. No problem. Get your foot in the door by offering to intern with them to learn the ropes. They can see you shine without risk and you can learn the ropes and start making connections.
- **Get your training wheels at a call center.** I know. It's not the most attractive sounding job but the reality is call centers are very efficient at training advisors because of their transactional nature. Look at it as a way to get hands on experience, while getting paid. A steppingstone to your dream career.
- **Join ASTA and start engaging with your local ASTA chapter.** Once you've joined ASTA, find your local chapter and start attending the events and get involved. ASTA events are a place where suppliers and agencies meet. It's the best place to pick up knowledge, network and show that you're dedicated to the industry!

Who Owns the Client?

There's one last thing to address when you're working as an employee. What happens to the client if you leave the agency? Are you able to take your client list with you as you start your own company or move to another agency?

Legally, the answer to the question depends on a number of factors. ASTA's General Counsel, Peter Lobasso, says that, generally speaking, advisors may solicit their former employer's clients unless they've signed an agreement promising not to do so. And clients are free to give their business to whomever they wish, again provided that they aren't subject to some contractual restriction, which would be very unusual on the leisure side of the business.

But from an ethical perspective, the answer is no. The agency may have a policy that you can take clients that you brought to the agency or family members, but by and large, if the client found you at that agency, the client belongs to the agency.

I want to stress the importance of this. Agency owners- which you may be one day- invest a lot of money on payroll, marketing, software, etc. to get and keep clients. When an employee leaves and actively contacts or pursues clients, it's the equivalent of theft. The advisor was paid to book these clients; the leads did not magically appear on their desk. It was because the agency invested a ton of money on marketing to get the phones to ring. Building a book of business off the back of someone else is wrong.

If the client finds the advisor after they leave the agency on their own and says they want to work with said advisor, that is a different story.

If an advisor is thinking about leaving- whether to another company or to start their own agency- it's important to do it right and respect the hard work and money the agency owner has put into their business. Leave the clients where they belong.

SUPPLEMENTAL RESOURCES



American Society of Travel Advisors

Find a [local ASTA chapter](#) and start attending the events and networking with working travel advisors.



American Society of Travel Advisors

Find job on [ASTA's Career Center Job Board](#).



CHAPTER 28 | CV/Resume Tips + Internships

Resume/CV Tips

So, you're dead set on working as an employee when you enter the travel industry, fabulous! Our next step is to give you some tips to ensure your CV/resume sticks out.

Here are 10 important things to remember. Let's jump in, shall we?

Personalize your resume to each position. Sending out a template, generic CV does you no favors. Make sure the skills and requirements they're asking for in the job description are on your resume. Some of the larger companies may use applicant tracking systems that can automatically disqualify resumes that are missing keywords. So, if they say that Sabre GDS skills are a requirement, make sure to mention it if you are Sabre GDS proficient.

Skip the industry jargon. Remember that for larger companies, it will most likely not be a travel advisor looking at your resume, but rather an HR person. You may want to throw around lingo to show you're knowledgeable but make it readable for the average person.

Let your soft skills shine through. Soft skills like teamwork, attention to detail, and leadership are important. Instead of wasting a bullet point by saying you have a particular soft skill, demonstrate it. *Here's an example of showing you have attention to detail vs. just flat out saying it:*

Strong attention to detail

Initiated a program to create CRM consumer profiles, adding 100+ data points to better target clients, leading to an 11% increase in email open rates.

Always quantify what impact you've had. Use numbers to showcase your success. In the above example, adding the 11% increase helps the reader understand what kind of effect you had on the company's bottom line.

Avoid repeating words. When your previous jobs have had similar responsibilities, it can be easy to use the same words repeatedly (ex: ~~Increased sales by \$3M~~~~Increased open rates by 5%~~). The problem with that is it's repetitive. Use that thesaurus and mix it up!

Make it scannable. The reader is likely looking at A LOT of resumes. Make it as easy as possible for them to quickly understand if you're a good fit for the job. Let's use the bullet point above for an example. Compare the two versions saying the same thing, but the second one does so with more words than necessary - literally!

Initiated a program to create CRM consumer profiles, adding 100+ data points to better target clients, leading to an 11% increase in email open rates.

Initiated a company-wide program to create CRM profiles of our entire customer database, adding more than 100 data points that allowed us to better target our clients. The end result was an 11% increase in email open rates.

Turn your lack of experience into transferable skills. You may not have experience booking travel but that's okay. Position your past job's skills as applicable to a travel advisor position. Maybe you have a strong set of customer service and sales skills because you worked at a call center. Perhaps you took multiple geography and world history classes.

TMI. The reader doesn't need to know every work experience you've ever had. If a job from 10 years ago is completely irrelevant, cut it. List the most important information that is relevant to the position. You may be really happy you were a

member of Phi Beta Chi in college, but unless you know the reader is an alumni or cares about it, leave it out.

Keep it above the fold. Your most important and applicable information should be at the top of your resume. That's valuable real estate so use it wisely!

Proofread that sucker! I can attest that when you're getting 200 resumes, it's hard to narrow them down. The first thing I toss out is spelling errors. Check it over and get another set of eyes (or two) to give you the all clear.

The last thing to understand is that when you're applying for a travel advisor position, of course it's important that you love new places and cultures. However, when a business owner or HR department is reading through resumes, they won't be impressed that you love to travel and that's your driving factor for wanting to be a travel advisor. While travel advisors certainly get to travel (especially leisure ones), the job is about much more than travel.

Companies are looking for people with sales skills, attention to detail and strong communication skills – not someone that likes to take a vacation.

Internships

Another option as you get started is becoming an intern at the company. Some agencies may have formal internship programs. *Here's a few examples:*

This is only a sample list and is not fully inclusive of all the travel advisor internships. These were the internships that were in place at the time this course was written and are subject to change.

- **ALTOUR**, a large travel management company (TMC), has a 4-week internship program that allows their interns to see the various divisions of the company.
- **Atlas Travel Group**, a leisure and meetings, incentives, conventions and events (MICE) agency, offers internships.
- **BCD Travel**, a large TMC, has a 10-week paid internship program introducing you to all aspects of corporate travel: airlines, hotel industries, travel management and more.
- **FROSCH**, a large TMC, typically offers a Spring internship program.
- **Valerie Wilson Travel**, a NYC-based luxury agency, offers internship opportunities.

And your first step into the industry doesn't necessarily need to be as a travel advisor if you're having difficulty finding a position. You can work/intern at suppliers and that will definitely boost your resume and appeal to any future agency positions. Here are some options:

- **Royal Caribbean International:** The cruise line offers a 10-week paid summer internship at various positions within their company.
- **Carnival Cruise Lines:** Offers entry level positions in multiple divisions for 10-weeks during the summer.
- **Disney:** Has internship opportunities across their companies, including Guest Services, which would complement any travel advisor's suite of skills. They even have a 5-8 month Disney College program.

Another place to take a look is industry job boards. ASTA's Career Center job board occasionally has internships pop up.

Oftentimes it's the larger travel agencies that have the manpower and budget to create a formal internship program. Since you're new to the travel industry, it can be hard to know who the big players are but don't you worry! I've got a little trick for you.

Every year the travel industry publication, *Travel Weekly*, issues out their Power List, which lists the top agencies by revenue. Here's the 2020 Power List but if you're reading this after 2020, just google "Travel Weekly Power List" and you'll get the most up-to-date version. I have to tell you though, there isn't a lot of movement or surprises in there as the top agencies have hundreds of millions to billions of dollars in revenue so you should be just fine looking at 2020.

When it comes to less formal programs, don't be afraid to reach out to smaller agencies and see if they'll be willing to take you on as an intern. With a less formal program, be prepared that even though you're new to the industry, you may be blazing your own intern trail.

If you really want to wow/convince them, craft up a rough internship program for yourself and see if they bite. Yes, I know it's difficult to come up with your own curriculum about an industry you know nothing about, but doing extraordinary things is what makes you stand out. Take a look at what other internship

programs cover outside of travel and use that as a loose structure. Heck, you could even use this course as a framework!

SUPPLEMENTAL RESOURCES



American Society of Travel Advisors - Career Center

Post your [CV where ASTA travel agency members can find you](#).



ALTOUR

Large travel management company (TMC) with a [4-week internship program](#)



Atlas Travel Group

A leisure and meetings, incentives, conventions and events (MICE) travel agency [internships](#)



BCD Travel

Large travel management company (TMC) which has a [10-week paid internship program](#) which introduces participants to all aspects of corporate travel: airlines, hotel industries, travel management.



FROSCH

Large travel management company (TMC) which typically offers a [Spring internship program](#).



Valerie Wilson Travel

A NYC-based luxury travel agency, offers [internship opportunities](#).



Royal Caribbean International:

The cruise line offers a [10-week paid summer internship](#) at various positions within their company.



Carnival Cruise Lines

Offers entry level positions in multiple divisions for [10-weeks during the summer](#).



Disney

Has [internship opportunities across their companies](#), including Guest Services, which would complement any travel advisor's suite of skills. They even have a [5-8 month Disney College program](#).



Host Agency Reviews

[Host Agency Reviews](#)'s [job board](#) occasionally has internships



Travel Weekly - A Travel Trade Publication

Travel Weekly's [2020 Power List](#)



CHAPTER 29 | Getting Out There: FAMs, Networking, and Continued Education

The landscape of the travel industry never stops evolving and changing. This is part of what makes it so exciting to work in this field! It also illuminates the importance of your continued growth and learning.

A successful advisor will stay engaged with their profession by going on familiarization trips (FAMs) to stay up-to-date on destinations, engage in networking opportunities and embark on continued education.

In this chapter, we'll review a few strategies to get out there, ensuring you're on a trajectory of continued professional growth.

Familiarization Trips (FAMs)

One way to ensure you're staying up to speed on things is to join FAMs.

We've touched on familiarization trips (FAMs) here and they are throughout the course, but here's a summary: **FAMs are a deep dive into learning first-hand a particular product, supplier, or destination.**

FAMs are distinct from conferences, certifications (though some certifications involve travel requirements), and industry networking because nothing can compare to an education of your hands-on experience of a destination.

FAMs are typically offered by, ASTA, suppliers, tourism boards, hosts/consortia and other travel organizations at a deep discount or even for free.

How do they choose who gets to go? It depends on the FAM. Typically, FAMs may be invite-only or include an application process. Here are a few ways to get on the radar for FAMs.

Sales threshold: To be frank, if you sell a lot, you are more likely to be eligible for a FAM. Different FAM opportunities will have different requirements. If you hit a wall and aren't getting invited to FAMs, ask a supplier what it takes and make it happen!

Have a sales plan if you can't meet the threshold: You are probably not going to instantly amass a ton of sales in one product or destination unless you are entering the industry with a big book of business.

To get on a supplier's radar, communicate to them your plan to reach the supplier's thresholds, whether you are in the process of putting together a promising group or can point to hard data on your sales growth over time to demonstrate you are climbing the curve.

Chat with advisors who have been invited on FAMs to learn their secrets: We do cover this more in the networking section, but don't be afraid to ask other advisors what they did to score their FAM trips to see if you can glean any insider advice.

Talk to your manager: After you have been on the team for a while, let your manager know you are interested in any FAM opportunities that arise for the products and destinations you are selling.

1. It's tough for any type of education to compare to the direct experience of a FAM, but there are also alternatives that can help replicate a FAM experience:
 - Schedule some site inspections while you are at a conference or on a personal vacation.
 - Chat with your BDM to get detailed insights on a destination. Ask them pointed questions that represent the interests of your prospective clients.
 - Connect with a tourism board of a destination (and get on their mailing list) to stay updated on local changes.
 - Join webinars or video tours of places you are not able to visit.

- Engage in a supplier or tourism bureau online social group (more on that next!)

Not to be mistaken for a vacation, FAMs can be grueling work. (Remember my story about falling asleep at the dinner table during a FAM?) They can also take a while to be invited to one, so don't be discouraged if opportunities don't immediately present themselves to you.

Networking

No matter how magnificent and self-sufficient you are, you will need a little support along the way. This section is called Networking but really it's about how you can make new friends that will help you become a better travel advisor.

Here's just a few other benefits of creating a network:

- It helps you stay current with travel industry news and resources
- You can tap into their knowledge to learn about areas less familiar to you
- Industry friends can help you troubleshoot any issues you run across
- There's an element of peer support, accountability and encouragement
- You can revitalize market strategies and think %outside the box+
- It's an easy way to get (and stay) inspired
- A network can help you create structure to set/achieve goals
- And you too can pay it forward knowing that as you gain experience and knowledge you'll be able to help others in your network over time

The travel community is a fun and smart bunch. Here's a few ideas on how you can get connected virtually and in-person.

Virtual Networking

Virtual networking offers you the opportunity to cast a wider net of social networks. This is particularly a benefit to those who work from home, but it's a support to any advisor, regardless of what their work situation is.

The other benefit of virtual networking is that it's free. No travel required. All you need to do is show up and engage!

Below, I list a number of Facebook groups. Start with the ones that are connected to your host agency, franchise, consortia, or your preferred suppliers and branch out from there. BDMs often have Facebook groups set up to communicate news to their advisors ([like this one](#)).

Every advisor should belong to their national trade association, ASTA (American Society of Travel Advisors). But don't forget travel organizations like: Women in Travel, Adventure Travel Trade Association, the International LGBTQ+ Travel Association, Blacks in Travel and Tourism, Destination Wedding and Honeymoon Specialist Association, Global Business Travel Association (to name just a few). When you join, ask what social groups they offer travel advisors.

Here's just a few examples of Travel Advisor Groups on Facebook you can tap into:

[ASTA Member Lounge](#): This is where ASTA posts when members of the press have reached out to them to tap into advisor expertise. Getting quoted by the press can have great networking benefits for your agency!

[ASTA Chapter Pages](#): Connect online with your local ASTA chapter.

[HAR's 7 Day Setup](#): This group is facilitated by Host Agency Reviews and is dedicated to new advisors who chose the entrepreneur path.

[Cheryl Rosen's Group for Travel Agents](#): An active group for travel advisors facilitated by travel-industry writer, Cheryl Rosen.

[Travel Agents Helping Travel Agents](#): A closed FB group for travel advisors only to ask questions, link to resources and air grievances. It's created in the spirit of support . . . the title says it all!

[Millennials in Travel](#): Millennials in Travel is a career development and networking organization for young professionals in the travel industry in any capacity (advisor, tour operator, hospitality, cruise etc.). The group is restricted to anyone born on or after Jan. 1st, 1975.

Join an online non-travel Facebook Group that relates to your niche:

Chances are, if you geek out over a specific niche you already do this. If you

develop a niche, join groups that relate to your niche even if it doesn't pertain to travel. Do you plan heritage tours in southern states? Join a historical society group of that region. Do you plan wine and gastro tours in southern France? Join a sommelier group.

I cannot emphasize enough how many groups are out there. Take a test drive of a few different groups and focus your energies on the ones you like best and offer you a variety of information and support.

IRL (In Real Life) Networking

When the travel industry hits a challenging time, such as a global pandemic, networks become even more of a lifeline. In addition to cultivating online connections, meeting up face to face (when that's possible) is a huge asset to travel advisors.

Here are three ways you can get quality facetime with you travel industry peers:

1. FAMS: We covered FAMS in another chapter. But FAMS are an incredible way to connect with suppliers and advisors who understand (or will come to understand) your very specific needs, challenges and triumphs as an advisor. A bonus is that you learn a ton about a product or destination as well.

2. Travel Conferences: I cannot emphasize enough the benefit of attending a travel conference and ASTA Global Convention is the must attend event of the year. Yet, there are tons of travel industry events out there, you can find a calendar of industry events on ASTA's corporate website, www.ASTA.org. Here you can connect with industry peers, get yourself some education and connect with suppliers. Conferences are a great way to get facetime in and help build even stronger relationships.

My only word of caution for travel conferences is that there are A LOT to pick from. Just like qualifying clients and suppliers, you can also qualify what travel conferences are the best fit for you.



An article on how to [choose the right travel conference for you](#).

3. ASTA Local Chapter Meetings: ASTA provides regional on-site and virtual chapter meetings. Though it is designed for ASTA members, you can attend as a non-member. As someone new to the industry, finding an attending a local ASTA chapter event is a great way to get involved to connect to nearby travel professionals.

But there are other ways to stay connected and network beyond the travel industry. Here are a few other strategies to grow your professional network:

Co-working Spaces

If you are home-based, it can be lonely. Co-working spaces can be an affordable alternative to leasing an office space. In addition to lessening loneliness, co-working spaces might provide creature comforts like meeting spaces, social events and trainings. They are also an amazing place to pick up clients so your company might even pick up the costs.

No co-working spaces near you? Make your own. Look into starting a small group that meets at each other's houses or in a shared space.

Local Networking Groups

Can a networking group help you? There's a ton of networks to choose from, so it's good to do a little research to make sure the network can help with your professional growth and career development.

There is a huge range of networking groups in terms of time commitment and fees. Some networking groups are intimate, tightly structured, meet often and have strict requirements for participation. Others are a revolving door with large social mixers where you might need to work the room. Some involve membership dues, and others are free.

There's a little something for everyone! Want a little help navigating how to build up your network?



[Here is an article on how to build a work community.](#)


Continuing Education (Keep Learning!)

It's not easy to keep up with travel advisor industry! In addition to FAMs, conferences, travel advisor groups, and networking groups, there are a myriad of opportunities for continued education in this industry.

Here's just a brief overview on the opportunities:

1. Certifications: You'll be amazed at the number of certifications you can earn as a travel advisor. There are destination certifications, product certifications, professional certifications and niche certifications galore. To give you just a taste of a few:

- **Professional certifications:** While some of these could fall under the niche category, I placed them here because they're typically very in-depth and are run by large associations.

- [ASTA's Verified Travel Advisor \(VTA\)](#)  program lets the travel industry and the consumer know you as an advisor of unparalleled knowledge, professionalism, and ethical boundaries beyond reproach.
- The Cruise Line Industry Association (CLIA) has [multiple certifications](#) that focus solely on helping advisors sell, market and grow their cruise business.
- The Travel Institute offers [three certification options](#) for advisors looking to grow professionally.
- For those that run in the corporate travel circle, [Global Business Travel Network's \(GBTA\) Global Travel Professional \(GTP\)](#) course ensures corporate advisors demonstrate core competencies.

- **Destination certifications:** The tourism boards and CVBs often have certification programs to help advisors learn the destination. The quality of the training will vary but all are free and open to any travel pros.

- **Product certifications:** Cruise lines and resorts/hotels often have certifications for advisors that complete their programs. These are always stellar, in-depth lessons that really help you learn the product.
- **Niche certifications:** Not every niche has a certification. However, if you aspire to be a romance travel specialist, accessible needs advocate, autism specialist, family travel or the like, you're in luck.
- **Consortia certifications:** The larger players ([Travel Leaders Network](#), [Signature Travel Network](#), [Ensemble Travel Group](#) and [Virtuoso](#)) have a slew of certification options for their members that range from Active and Adventure to Romance to Business Travel specialists.

2. Host Agency/ Franchise/ Consortia Education Programs: Many hosts, franchise and consortia provide training to their members. They may use different educational tools, systems and delivery methods but all will help you level up.

3. Travel Advisor Schools (Colleges & Universities): When it comes to travel advisor training, [travel advisor schools](#) typically offer degrees or professional certificates to those who want to become a travel advisor. Most travel advisor schools are online, though there are still a few rare birds out there that offer a classroom setting.

Keep in mind, you'd want to check if the program is a.) accredited and b.) degree-seeking.

4. Business and Sales Coaching: These types of programs are typically run by industry professionals- travel advisors, travel industry writers, agency owners, former BDMs etc.

Many times, these programs focus on a specific type of travel such as destination weddings or FITs. Many of them also include an element of coaching or mentoring.



[ASTA Facebook Member Lounge](#)

This is where ASTA posts when members of the press have reached out to them to tap into advisor expertise. Getting quoted by the press can have great networking benefits for your agency!



[ASTA Chapter Pages](#)

Connect online with your local ASTA chapter



Travel Agent Partners of the Midwest Region Facebook Group

BDMs often have Facebook groups set up to communicate news to their advisors ([like this one](#)). This is a private group for all Travel Agent Partners of the Midwest Region to interact and stay updated with the Unique Vacations Midwest Sales Team (An Affiliate of Sandals and Beaches Resorts).



[7 Day Setup](#)

This group is facilitated by Host Agency Reviews and is dedicated to new advisors who chose the entrepreneur path.



[Cheryl Rosen's Group for Travel Agents](#)

An active group for travel advisors facilitated by travel-industry writer, Cheryl Rosen.



[Travel Agents Helping Travel Agents](#)

A closed FB group for travel advisors only to ask questions, link to resources and air grievances. It's created in the spirit of support . . . the title says it all!



[Millennials in Travel](#)

Millennials in Travel is a career development and networking organization for young professionals in the travel industry in any capacity (advisor, tour operator, hospitality, cruise etc.). *The group is restricted to anyone born on or after Jan. 1st, 1975.*



Niche certifications

Not every niche has a certification. Here are resources for certification in [romance travel specialist](#), [accessible needs advocate](#), [autism specialist](#), [family travel](#).



CHAPTER 30 | Tips from Advisors

You, my friend, have been doing amazing. This course, while called an intro to becoming a travel advisor, is intense and full of information. Yet here you are, well over two hundred pages later, sticking with me.

As we're starting to wrap things up, I thought it'd be a good idea to bring in some advice straight from the mouth of travel pros on the front lines. When asked, "What advice would you give someone new to the industry?" this is what they had wanted you to know:

“ Education never ends! ⚡ Anne C., ND

“ Join a business networking group. ⚡ Lauren M., FL

“ Become a member of your local ASTA group and if you have time hold an office in the chapter. ⚡ Luanne Z., NV

“ I have not attended, but think it would be very valuable to attend the event* ASTA has in Washington DC every year. ⚡ Luanne Z., NV

**The event is ASTA Legislative Day and I agree, you [should definitely attend it at least once. Here's why.](#)*



“ Take as many vendor education classes as you can and review them often. ⚡ Irene, FL

“ Educate yourself & become a "pro" in at least one area of the world! Read, travel & ask questions. Learn about restaurants, shops & culture and more in your niche area. Add more to your clients experience by suggesting your

favorite restaurant, shop or experience in the area. PERSONAL SERVICE & KNOWLEDGE sets you apart from 3rd party booking sites or self-booking. ô Betsy P.

“ Network with other travel agents. I've met so many great agents at different meetings and FAMS. We've become friends and support each other. ô Danielle K., MI

“ I love taking destination courses. I've found it an easy way to meet the representatives. It has helped me get invited on different FAMS. ô William, CA

“ Make sure to check out marketing ways the different tour operators and cruises offer. Some even have ways to send out quotes with great links to hotels and excursions with your name on them. ô Paulette O., NC

“ I actually love the learning process and being new, I have been lucky enough to be able to focus on education. I feel like it is making me so much better of an advisor than I would have ever had the chance to be if I had kept booking full speed and didn't have the time to stop and learn. ô Mariyana C, AL

“ Write thank you notes. Not via text. Not via FB messenger. On paper where you can insert your card. ô Betsy P.

“ Get to your BDMs. Even if they don't live by you! I follow mine on Facebook. I make sure to interact with their posts. ô Georgie L., NYC

“ I take every education class I get fit into my schedule. You never know when some odd piece of information you learn will come in handy. ô Michelle B., WA

“ Experiment with booking a minimum land trip with tour operators to get a great airfare for your client. I was first introduced to this by an experienced TA, now I share it with everyone! ô Tiffany R., MI

“ Create your own, or purchase a CRM that works for you starting day 1 (or today) and always keep it up to date. There is no time like the present right? ô MarySue T., RI

- “ Make sure your desk is neat and dusted from the chair your client sits. This was brought to my attention when a client wiped their finger on the back side of my monitor. Yikes! ô Melissa T., IA
- “ Use your CRM! Keep all the notes about clients... even if they are your best friends!
- “ We need to have something to look back into for things and your CRM is there for you!! ô Leesa W., FL
- “ Then tweak as necessary. ô Katie T., MN
- “ Service! Go above and beyond with clients and they will come back and give referrals. They won't want to book online by themselves either. Patience is a virtue when working with clients, they appreciate that more than anything. ô Kari D., MN
- “ Every booking I make gets a handwritten thank you note! I sit down every Sunday and write them for what I booked that week! I also include a few business cards, pen and a brochure of where they are going if they don't have one. I can't tell you how excited clients get with this little touchpoint!!! ô Cheri S., MI

And there we have it. Words of wisdom, encouragement and inspiration. ♥



CHAPTER 31 | Job Possibilities

I can't believe we've made it this far. You've stuck with me for a long time and you've got what it takes to enter the industry and start your travel career - yay!!

So, let's take a look at what type of jobs you can expect as a travel advisor. I want to stress that the following job descriptions are just a slim view as to what's available to you. Naturally we've got the obvious, more cookie cutter roles, but there are plenty of niche positions with small and large companies, you just need to look for them!

Whether you have a desire to book journeys for photographers on safari or will only entertain a position where you can book travel for the entertainment industry, whether you want to work from home or need to work out of an office so you can collaborate and learn from your peers, there's a job somewhere out there for you.

On the following pages are few examples of just some of the career opportunities out there waiting for you:

Lana'i Travel Advisor, Four Seasons (Luxury)

The Lana'i Travel Advisor sells the Four Seasons Lana'i resorts and sets the tone for our guests pre-arrival and inspires the irresistible attraction to our island as a luxurious and adventurous vacation destination. Lana'i Travel Advisors will build a positive rapport that lasts beyond the first inquiry. The Lana'i Travel Advisor will be an effective communicator and listener, a strong salesperson, and will perform all tasks necessary to ensure success in the day-to-day operations. The Lana'i Travel Advisor handles all aspects of guest reservations, provides information about the resort, resolves guest concerns, and provides professional service to gain high level of guest confidence and satisfaction. We are seeking a self-motivated, driven individual who possesses strong verbal and written communication skills, a desire to create unique and memorable experiences, a team player, and is able to identify opportunities to capture revenue.

Essential Functions

- Must maintain knowledge of the island of Lana'i, the two resorts, guestrooms, activities, package options, and amenities of the properties.
- Receive inbound and make outbound sales calls; Answer guest requests and offer the guest options for activities during their stay.
- Answer inbound calls and emails in a timely manner; identifying opportunities for additional revenue capture.
- Execute follow up email introduction to Lana'i Experience planners to assist the guest in activities planning.
- Assist the Lana'i Experience Planning team and management as needed with guest profile management, obtaining arrival and departure times, and adding shares in OPERA, booking packages, and other tasks as requested by management to set the activities team up for success.
- Must be detail orientated and take great care in serving the guest requests obtaining all guest data, including share names, ages of children, and any essentials that will anticipate their needs and record them in Golden profile management.
- Review arrivals reports to identify guests for outbound sales efforts (i.e. up selling web reservations, etc.)
- Complete administrative tasks such as managing online reservations, email communication and timely follow up, taking deposits, wholesale reservations, Reservations Review, and Run Trace reports.
- Interact with essential operations departments professionally to ensure guest needs are met and to deliver a superior guest experience.
- Ascertain guest inquiries and demonstrate resourcefulness in providing solutions.
- Learn, embrace and implement the Aspire sales funnel, maintaining an average monthly score of 85%.
- Assist as needed with new hire training, job shadowing, cross training, and ongoing team development as requested by management.
- Assist with any projects and tasks as requested by management team.
- Candidates must have valid work authorization for the U.S.

What to Expect

- Competitive Salary & Wages
- Competitive Benefits
- Paid Time Off and Holiday Pay
- Excellent Training and Development opportunities
- Complimentary Accommodation at other Four Seasons Hotels and Resorts
- Complimentary Dry Cleaning for Employee Uniforms
- Complimentary Employee Meals
- Employee Recognition Programs

FOUR SEASONS RESORTS LANA'I

On this pristine island, Four Seasons Resorts Lana'i provides a one-of-a-kind experience - presenting both ocean and highlands landscapes and balancing a sense of tranquility with an abundance of recreational activities. In our exquisite Resorts - frequently listed among the world's finest - Four Seasons combines the very best of Lana'i. Four Seasons Resorts Lana'i has been named Best Hotel in The USA by U.S. News & World Report, the global authority in rankings and consumer advice, in 2020 Best Hotels rankings. As an employee of the Four Seasons Resorts Lana'i, the opportunities are endless and so are the experiences!

FOUR SEASONS HOTELS & RESORTS

Four Seasons is dedicated to perfecting the travel experience through continual innovation and the highest standards of hospitality. The deeply instilled Four Seasons culture is personified by its employees - people who share a single focus and are inspired to offer great service. At Four Seasons, we believe in recognizing a familiar face, welcoming a new one and treating everyone we meet the way we would want to be treated ourselves. Whether you work with us, stay with us, live with us, discover with us, we believe our purpose is to create impressions that will stay with you for a lifetime. It comes from our belief that life is richer when we truly connect to the people and the world around us.

Travel Experience Counselor, Carlson Wagonlit Travel SatoTravel (Corporate)

Carlson Wagonlit Travel SatoTravel (CWTSatoTravel) is seeking an experienced and talented Travel Experience Counselor for our Camp Geiger, Jacksonville, NC. As a Travel Counselor your mission will be to deliver the Perfect Trip+ in order to sustain optimum results for our clients and for CWTSatoTravel.

As the U.S. military and government division of Carlson Wagonlit Travel (CWT), CWTSatoTravel is a global leader specializing in seamless travel management services to our U.S. federal clients. We employ a team of more than 900 associates throughout 187 locations in 14 countries and U.S. territories. Though our offices are spread across the world, we are a tight-knit group with access to resources and innovations that enable us to deliver the best services in the industry.

We are very proud of our 65+ year history serving U.S. military and government clients and are always looking for new talent to help us grow as a team. Our most valuable asset as a company is the quality of our people. We are a growing family and encourage you to check out our career opportunities and start your journey with CWTSatoTravel today.

- You will delight the traveler/travel arranger and all CWTSatoTravel clients
- Arrange domestic and international travel for clients, including air, hotel, rail, and ground transportation
- Be a trusted advisor by offering informed and insightful recommendations which will provide the very best traveler experience
- Interact with travelers, and travel arrangers by leading and listening conversations to provide the first level of support for customer service and resolve simple customer problems
- You will strengthen the CWTSatoTravel brand
- Build loyalty by enhancing our clients' overall travel experience while meeting every travel management service requirement and expectation
- Maintaining a favorable working relationship with all other company employees and ensuring to foster and promote a cooperative and harmonious working climate
- Embrace new technology and ways of working to promote flexibility to adjust quickly to the shifting needs of the business
- You will build CWTSatoTravel's value. Possess a strong understanding of travel trends and industry best practices
- Seek higher levels of performance continuously.
- We are looking for an energetic self-starter with the desire to learn and grow who exemplifies the following traits:
 - High school diploma or equivalent
 - Minimum 1-3 years travel counselor experience
 - Excellent industry knowledge and reservation skills in order to create domestic and international reservations to include air, hotel, rail, and ground transportation

- Knowledge of ticketing procedures
- Proficiency in a minimum of one native GDS
- Sabre experience preferred
- Government travel reservation experience a plus
- Ability to meet and maintain required performance standards
- Excellent customer service and communication skills required
- Americorps/PeaceCorps and other national service alumni are encouraged to apply

Adventure Travel Consultant, Austin Adventures (Adventure)

At Austin Adventures we believe that travel has the power to change us. To let us see the world, and our role in it, through a new lens. We are a best in class, family-owned and operated boutique international adventure travel outfitter. Our carefully curated and ultra-personalized itineraries allow guests to experience the land, the people, and the culture in the most immersive, energizing, and inspiring way possible. With the decades of experience and unmatched access to our National Parks, our knowledge, credibility, and insider access offer an experience that is . simply put . unparalleled.

You Must Have:

- 1-2 years of experience in sales, consulting, or the outdoor industry.
- Be able to adapt and react to a rapidly changing environment.
- Good scheduling, follow up, and time management skills.
- Personable, outgoing, and self-motivated through goal driven excellence.
- Computer literate - very familiar with the internet, email, and Microsoft Office programs.
- Works well little supervision but also able to function within a team environment.

Bonus if you:

- Have a passion for the outdoors and travel.
- Have traveled globally to Latin America, Europe, Africa, and or Asia.

Duties:

You will be a primary point of contact for guests and all aspects of the sales function. Main responsibility is to guide prospects through the process of booking our Adventure Travel Packages, and custom designed itineraries. You must be able to adapt and provide a high level of service in a fast-paced and exciting environment. Travel Consultants represent the company with vendors and clients both inside and outside the industry in the highest light possible. Projecting a positive and quality based image at every opportunity.

- Generate new and repeat guest Adventure Trip sales by providing product information in a timely manner.
- Proactively recommend items needed by guest to increase guest customer satisfaction.
- Conduct outgoing sales calls to already established guests.
- Be an expert and remain current on all Product/Regional knowledge of the destinations sold.
- Become an expert with our reservation system.
- Study the travel industry and our competitors products.
- Manage time effectively, meet personal goals and work effectively with other member of the team.

Benefits:

- Powder days . if it's snowing and you are all caught up on work, check in with your supervisor. While rare, we do approve powder days. Work Saturday and enjoy fresh skiing on a weekday.
- Opportunities for travel and familiarization trips.
- 10 Days PTO.
- Eligible for Medical, Dental, and Vision coverage after 90 days

Senior Corporate Travel Consultant - Entertainment, BCD Travel (Entertainment)

The Senior Corporate Travel Consultant - Entertainment is responsible for accurately and efficiently handling incoming requests via multiple channels (i.e. phone, email, etc.). They are the primary point of contact for active travel consultation for travelers.

This person performs at an expert/senior level and demonstrates an extensive understanding and applicability of all areas in the travel industry. They must be able to work independently and maintain the confidentiality of the client.

- Sabre GDS skills required. The hours for this position are TBD between 9am - 10pm ET, M-F
- Essential Duties and Responsibilities Include:
- Books routine reservations for air travel, hotel and car rentals, with detailed follow for completion and changes to complete the reservation.
- Books small groups and equipment movements for music bands and the like, involving special arrangements for large amounts of equipment
- Charters private aircraft when scheduled aircraft does not meet needs.
- Books special and unique services as required by clientele.
- Schedules meet and greet services for airport escort services.
- Responds to requests for price quotations utilizing automated system(s) for domestic and international itineraries.
- Conforms to client travel standards and policies.
- Promotes the acceptance of fares, rates, and suppliers that match the client's travel program policies and negotiated contracts. Applies discount programs appropriately.
- Moves market share for BCD Travel preferred suppliers.
- Maintains and promotes professional and courteous client relations by managing a prompt and accurate response to telephone and email communications.
- Remains informed of all airline rules and regulations and current affairs. Communicates information to clients accurately and appropriately.
- Achieves individual and contractual service level goals related to telephone, quality, and productivity.
- Maintains client profiles, ensuring special requests and reward program information such as frequent flyer/driver/hotel stay are included.
- Monitors, sorts and works global distribution systems (GDS) queues daily to maintain quality control.
- Ensures optimum customer service through effective use of phone systems and positive telephone service techniques.
- Knows and properly uses: airline terminology, codes, fare basis, airline rules and tariffs, resource guides, books, and industry contacts.

Qualifications:

- Minimum of four (4) + years active Travel Consultant experience in the past 6 years.
- Prior entertainment industry experience
- Strong interpersonal skills and professionalism
- Strong domestic knowledge and basic international knowledge.
- Above average productivity level (subject to management assessment for off-the-phone projects).
- Achieve established office goals for measurable accuracy.
- Exceptional customer service skills.
- Proficiency on Sabre GDS system.
- Demonstrated internet research skills for customer information.

Travel Sales Consultant, Viking River Cruises (River Cruise)

Want to be part of Viking's top sales force with the potential to earn between \$60,000 and \$100,000 per year (base + commission)? Viking is currently seeking highly motivated sales individuals to join our team. You will be responsible for luxury travel sales and service to clients, including the handling of complex travel itineraries and pricing plans. We look forward to welcoming you on board!

Job Responsibilities:

- Handle inbound sales calls from prospective passengers to identify their needs, provide a solution, sell the Viking Cruises benefits and complete the reservation booking process
- Make follow-up outbound calls to prospective customers to provide additional information, overcome objections and finalize booking for a reservation
- Maintain individual sales and service quality goals
- Adhere to set schedule
- Preferred Qualifications:
- Previous call center experience
- General knowledge of world geography
- Highly motivated and driven to succeed
- College degree
- Excellent communication skills

Required Qualifications:

- Previous sales experience and a proven track record of success
- Ability to close sale on a single call
- Ability to work flexible schedules, including evenings, weekends and holidays
- Experience with social media
- Compensation & Benefits
- Highly competitive hourly rate and commission
- Excellent Medical/Dental/Vision benefits
- 401k with company annual match
- Paid training
- Paid vacation
- Paid holidays
- Travel and cruise rewards
- Discounted theater, theme park and movie tickets
- Employee wellness program
- Gym membership

About Viking Cruises

Viking was established in 1997 with the purchase of four ships in Russia and is now the leader in river and small ship ocean cruising. Designed for discerning travelers with interests in science, history, culture and cuisine, Chairman Torstein Hagen often says Viking offers guests "The Thinking Person's Cruise" as an alternative to mainstream cruises. Viking currently operates a fleet of more than 70 state-of-the-art river ships and an innovative ocean fleet offering destination-focused scenic cruising on rivers and oceans around the world. Viking has plans to grow its fleet of 930-guest ocean cruise ships to become the largest small ship ocean cruise line.

Among its industry accolades, Viking was rated the #1 ocean cruise line in Travel + Leisure's World's Best Awards in 2016, 2017 and 2018 and was also voted the #1 River Cruise Line by Condé Nast Traveler in their 2018 Readers' Choice Awards. Additionally, Viking received 11 first place awards in the 9th annual Cruise Critic 2019 Cruisers' Choice Awards, including "Best Overall Small Mid-Size Ocean Ship" and "Best River Cruise Line." The Cruisers' Choice Awards name the best cruise ships in the world, based solely on ratings submitted with member reviews published on the Cruise Critic website.

International Travel Consultant, Raptim Humanitarian Travel (Faith-based)

This position is located on-site in our GRAPEVINE TX office. The employee will primarily service the travel needs of Raptim Humanitarian Travel's faith-based clients across the globe according to company standards of excellence. Travel needs of clients would include but are not limited to international and domestic air arrangements, hotel and car reservations, passport/visa assistance, and travel insurance.

Essential Functions

- Responds to client travel inquiries
- Builds strong relationships with clients
- Responds within company standards to all emails with attention to detail and accuracy
- Uses consultative sales skills and anticipates client needs when presenting options to clients
- Utilizes global contracts to maximize profit and provide additional cost-savings for clients
- Interacts with clients by thoroughly, accurately, and quickly responding to requests
- Follows company procedures and standards of excellence when responding to client inquiries
- Communicates effectively, both in verbal and written form
- Types with above average speed of 45 words per minute or greater (preferred)
- Retains knowledge of client processes and procedures
- Participates actively within assigned team
- Assists team members in completing all functions related to servicing the client
- Maintains positive working relationships with other employees within the team & company
- Attends staff meetings and all scheduled trainings
- Adapts to new concepts and ideas with an open mind
- Keeps supervisor informed of problems
- Uses analytical thought-process to approach problem solving
- Independently researches travel-related problems and provides solution options
- Maintains a high level of competency in operating company systems
- Keeps current on all internal programs
- Keeps current on phone system, Microsoft Word/Outlook, & agency reservation system
- Keeps well-organized inbox and email filing system
- Projects a positive and professional customer service image
- Performs all other duties, as assigned by manager

Requirements/Qualifications

- Prior travel industry experience preferred, with preference to international travel experience and business/corporate travel agency experience
- Knowledge of travel products, including but not limited to airline routings and destinations

- Ability to comprehend written directions, programs, systems
- Proficiency in MS Word, MS Outlook (or similar email program), and the use of the internet
- Strong customer service skills & sales skills
- GDS Experience; Amadeus preferred

Additional skills/qualities required: personal drive for excellence; adaptable; flexible; dependable; integrity; self-motivated and productive; attention to detail; persuasive; personable; excellent communication: written & verbal.

People who care - and work with compassion - are needed in the most uncommon places on earth, so they can prevent illness, educate and train, build or rebuild, and give people hope. They can't always get there on their own; it takes a strong global team to make their travel possible. Our people are always available, willing to listen and understand the changing needs of NGO, humanitarian and mission organizations, offering creative solutions and efficient services that our clients can rely on.

Post-Sale Group Consultant, GOGO Worldwide

Vacations (Groups)

Job Responsibilities

- Responsible for all group operational changes from signing of contract until group travels
- Maintain/increase profitability of group
- Ensure inventory is always updated
- Ability to work with suppliers
- Constantly look to improve processes
- Ensure all service levels are met for turnaround time
- Ensure quality control is completed for each group
- Ensure all sales goals are met for the company
- Lead and assist new team members when necessary
- Develop and grow customer relationships

Skills

- Softrip experience a plus
- Previous group sales experience a must
- Flexible and able to multitask
- Motivated self-starter
- Ability to work with suppliers
- Strong Customer Service Skills
- Excellent verbal/ written communication skills
- Strong teamwork capabilities

Highlights Along the Way Will Include

- Unlimited Earnings - You'll work on a base salary plus uncapped commission; the more you sell, the more you'll earn!
- Full-time position
- Our own in-house Learning Center - We will provide you with all the tools you need to get up and running, as well as ongoing training to further develop your skills and knowledge.
- Discounted travel benefits - With our own in-house staff travel advisors we'll keep you up-to-date with any exclusive and industry specials.
- National and international awards nights, buzz nights, conferences, FAM Tripsō the list goes on.
- FREE and confidential access to our own financial advisors.
- Career development and advancement opportunities.
- Unbeatable company culture.

That's the way to end this course, isn't it? Showing you the limitless possibilities of your next career move!

I can't wait to see you at an industry event. Don't be afraid to say hello! I promise, I'm really friendly and love meeting new people.

Next steps

There are just a couple more exercises for you to do. (Sigh!) Thought you were done right. No, you are just getting started. And it is all good. There was a segment of the Oprah Winfrey Show "Happiest Jobs in America" show revealed that travel advisors are among the happiest professionals in America and that sentiment has stood the test of time.

So, get your resume/CV written.

Be sure to take the course exam and add to your CV that you successfully completed this course.

If you have not already, go ahead and join ASTA to get your ASTA Verified Travel Advisor certification. Be sure to list that you have taken ASTA's certification program on your CV. I would make that line bold.

To get your resume/CV in front of ASTA member travel companies go to ASTA's corporate website, www.ASTA.org and create a free account in ASTA's Career Center.

www.ASTA.org/Careers

www.ASTA.org/VTA

"The two things I love the most about being a travel advisor are the personal reward from seeing my customers' dreams come true and the fact that no two days are alike."

- Jason Coleman, travel advisor entrepreneur





CHAPTER 32 | Wrapping Things Up

Holy cats!!! We did it! Give yourself a much-deserved swirl and twirl (or high five if you aren't into the swirls and twirls).

This course is your map to the industry. You've taken the time to study the map and understand it, now it's time to start your journey. The trek you're on is not necessarily easy but you now have the tools and knowledge to be successful.

While this is the end of the course, it's not the end of the resources available to you. I've put together a list of materials to compliment the lessons.

Our free resource page is exclusive to students taking *ASTA's Roadmap to Becoming a Travel Advisor* course.

What will you find there? Here's just a few of the items:

- 15-page travel agency business plan template
- Booking videos
- Cruise inspection checklist
- Site inspection checklist
- List of industry publications

You can view/download them any time at HostAgencyReviews.com/ASTAintro.

And last but not least, please stay in touch! Reach out with questions, comments, ideas to make the course better. I love to hear feedback and am always happy to help.

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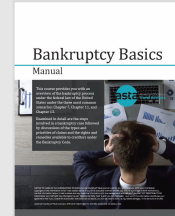
Welcome to the travel industry!

Steph Lee, Founder, Host Agency Reviews



Supplemental Reading | The Duty of Care

NOTE: The following is a brief introduction to the legal principle of duty of care, one that prospective travel advisors should familiarize themselves with. The information presented here was adapted from material in the Bankruptcy Basics Verified Travel Advisor course, created by ASTA's General Counsel, Peter Lobasso. Readers are advised that it is not intended to be an exhaustive discussion of the subject.



Agency Relationships and Legal Liability

From a legal perspective, the interaction between a travel advisor and her client creates what is known in the law as an agency relationship. The existence of such a relationship has important legal implications. Chief among these is the common law rule that a person who discloses that she is acting as agent for an identified third party, known as a principal, will not be held legally liable to his or her client should the principal fail to perform.

In the context of our industry, the travel advisor acts as the agent and the supplier, be it an airline, cruise line, hotel, etc., is the principal. To illustrate the application of the rule, suppose an advisor books a plane ticket for a client. If the client is unable to fly on the scheduled date because the airline goes out of business in the interim, the travel advisor will not be held responsible for whatever losses are incurred by the client as a result.

It is important to note that the rule relieving the agent of liability for the principal's failure applies only when the agent advises the client who the principal is. In other words, to have the protection of the rule, the advisor must disclose to the client the identity of the supplier, by name, that will be providing the services. For example, state Hilton and not just hotel, or Carnival rather than cruise line. The failure to do that will expose the advisor to legal responsibility in the event of supplier default, and this is the case even if the advisor has no reason to believe the supplier will default and otherwise acts diligently in recommending a suitable service provider for the client's travel requirements. So, for your own legal

protection, it's critical to always inform the client of the identity of the supplier being booked.

The Advisor's Duty of Care

The existence of an agency relationship also imposes on the advisor a number of legally enforceable obligations, known as duties, with respect to the client. To satisfy these obligations, advisors are required to take or, in some cases, refrain from taking certain actions. These duties are known collectively as the **DUTY OF CARE**, and as the term suggests, **travel advisors are expected to exercise care and diligence when acting on behalf of their clients.**

While this may seem a bit abstract, what this means as a practical matter is that an advisor can be held legally responsible for any damages that are suffered by a client (or for that matter anyone else to whom a duty of care is owed) which result from the advisor's failure to perform as expected under the law.

While the duties owed to a client by a travel advisor that comprise the overall duty of care may take on a variety of forms depending on the circumstances, the specific duty most relevant to the subject matter of this course is the duty to disclose. *(Note that the duty to disclose may also be referred to alternatively as the "duty to inform" or the "duty to warn." These terms are often used interchangeably.)*

Duty to Disclose

At the heart of the duty to disclose is the advisor's obligation to make known to his or her client all information that the advisor is aware of that is material to the client's travel plans. What exactly an agent is required to disclose in any particular situation turns on what is meant by the word **material**. For our purposes, material means information that if known to the client would be reasonably likely to influence the traveler's decision with respect to where, when, or how to travel.

Reminder of what was covered in Chapter 11: Document. Document. Document. Maintaining documentation proving that you made a disclosure can be crucial to your defense should you be sued and end up in court.

For example, let's say you've just booked a couple on a luxury cruise. In the course of your discussions, one of them mentions that he suffers from a chronic illness which has in the past forced them to cancel their travel plans at the last minute. Were that to happen again here, the couple would lose the entire cost of their vacation. However, as a seasoned advisor you know that travel insurance policies are available that would make them whole if they were forced to cancel their trip for health reasons. Because the clients would be reasonably likely to wish to avoid a significant - and foreseeable - financial loss, the availability of travel insurance is material information with respect to their travel plans. It follows then that making a disclosure to your clients as to the availability of travel insurance plainly would be in order here.

It is worth mentioning that an advisor typically will not be held legally responsible to a client for failing to disclose information about a situation that is a matter of widespread common knowledge among the general public. An exception exists where the advisor knows or has reason to know that the client is unaware of such information despite its widespread dissemination. In the latter circumstance, the advisor still must make the disclosure to the client. As reasonable parties sometimes can disagree as to what is (or is not) common knowledge, when in doubt it is best to err on the side of making the disclosure.

Duty to Investigate

Ordinarily, an advisor's duty to disclose material facts to her client is limited to that information of which the advisor has actual knowledge. However, in cases decided in a minority of jurisdictions, courts have held that agents (as used in the legal sense of the term) have a duty to investigate in order to be apprised of conditions or circumstances impacting the party to whom the duty of care is owed. Travel advisors in these jurisdictions would therefore be obligated to take reasonable steps to keep abreast of developments in the industry that could materially affect their clients' travel plans.

To illustrate, consider a situation where an advisor books a tour for a client. After completing the booking, but before the client is scheduled to travel, the tour operator abruptly ceases doing business, cancels all scheduled tours, and files for Chapter 7 bankruptcy protection. The news of the tour operator's failure is widely reported in the travel press but is not a matter of common knowledge outside the travel industry.

In a jurisdiction that imposes the duty to investigate, the advisor would be obliged to inform the traveler of the development and would be liable to the client if he failed to do so. The fact that the advisor might not even be aware of the news would not relieve him of the duty. Conversely, in a jurisdiction that does not impose a separate duty to investigate, the advisor would only be liable to the client if he actually knew of the tour operator's bankruptcy and then failed to report it to the client.

Other Considerations

There are several other important legal concepts beyond the scope of this summary overview which merit consideration by anyone contemplating becoming a travel advisor. For example, in most travel transactions the advisor acts as the legal agent for the traveler as well as the supplier whose services are being sold. This means the advisor owes a duty of care to both parties at the same time. And where an advisor is considered to be her client's fiduciary, she will be held to an even higher standard of conduct than that required under the ordinary duty of care. For a more comprehensive treatment of these subjects, and others, we refer you to ASTA's *Agency Relationships and the Law* Verified Travel Advisor course.



Travel Agent Chatter

with Steph Lee

Diving into the World of Travel Agents

Here at Host Agency Reviews we decided to spread our wings and venture into the podcast arena. Except I don't want to call Travel Agent Chatter a "podcast"—too much pressure. So instead, I'll say Travel Agent Chatter is where I (Steph Lee) sit down and get to know agents from all walks of life. We'll be interviewing new travel agents, veteran agents, agents who book leisure, corporate, groups, you name it!

Each 30-45 minute Travel Agent Chatter show dives into the world of travel agents. Starting and growing their travel agency. Marketing. Successes. Bumps in the road. Booking tips. Tons-o-fun! **Join us!**



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17

Lary Néron, Airfare Consultant

Billing himself as an airfare consultant instead of a travel advisor, he's hard proof you can make money in airfare. How does he charge \$60-500/tix? Find out!

EPISODE

12

Andres Zuleta, Boutique Japan

With tenacity and creativity, Andres Zuleta built his agency, Boutique Japan, from the ground up. Learn how he developed it into the 2.3M agency it is today.

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10

Valerie Gossett, Premier Resources Travel Group

Find out how Valerie filled her 196 person group in 28 days, what you must have in your groups contracts and how she trained her clients to book early to save.

EPISODE

6

Becky Lukovic, Bella Travel Planning

Becky shares how she went from backpacking around Europe to selling luxury travel. It's not about the dollar sign, it's about much more. Find out what.

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“The more time I spent in class, the more I got comfortable talking to my fellow students about my love for travel. When I started receiving positive feedback from other students telling me they can hear so much passion when I talked about travel, I knew I was going to be able to connect well with future clients.”

-Virtual Campus student



Travel Agent Training Virtual Campus Program

Our travel agent training Virtual Campus program is much more than the traditional independent on-line learning program.

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Our travel agent training Independent Learner program is a self-paced, on-demand training program. The material is current and delivered via an online portal in a fun and engaging self-paced format.

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Travel Leaders of Tomorrow, an Internova Travel Group company, was founded in 2013. Since then we have had over 1,000 future travel advisors go through the training program. Travel Leaders of Tomorrow has been a proud member of ASTA since its inception.



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