

Strengthen Client Relationship with Activity Manager

Tired of the paper nightmare taking over your desk? So many post-it notes you can hardly find your computer? Through the use of Reminders, Notes, and Mailers, *ClientBase Online* makes tracking communication with your clients a paperless process. Best of all, this information can be shared among agents and used to manage the marketing activities going on in your agency.

Reminders act as “ticklers” to keep you on top of important activities like brochure follow-ups, final payments, welcome home calls, birthdays and other marketing activities. Agents create Reminders to schedule future contacts and maintain daily to-do lists.

Notes allow Agents to easily document the contact your customers have with your agency such as Client Comments, Client Inquiries, or Client Questions.

Mailers act like entries in a marketing “log.” They are a historical record created automatically whenever a label, document template, e-mail, or mail merge file is created for a client or group of clients.

(Studies have shown agents' productivity and sales increase dramatically when using an activities management system like ClientBase Online. Better agent productivity is an important ingredient of a happy and successful agency.)

Example:

The agency's most productive agent, Dianne, works from a daily Reminder and to-do list in *ClientBase Online*. From this area, she tracks and completes all of the customer marketing tasks that keep her valued clients loyal. *ClientBase Online* helps Dianne manage her schedule and “to-do” list so she is efficient at:

- Following-up and closing just about any travel lead that comes her way.
- Managing all of the tasks involved in planning a trip, including checking on payments, documents, waitlists, seating etc.
- Welcoming her customer home from their trips, as well as scheduling and managing on-going communications with her valued customers.

The way that Dianne begins her workday each morning tells you one of the reasons that she is a productive agent. The first thing she does when she signs into *ClientBase Online* is click on the *Activities Manager*. By default, *ClientBase Online* searches the database for Dianne's Open Reminders and the Results Screen immediately displays a list of the Reminders (or tasks) she needs to complete today. She likes to plan ahead and it is becoming more and more apparent why Dianne is the most productive agent. It has taken less than one minute for Dianne to review and organize her day with the help of *ClientBase Online*.

Steps for successfully implementing basic Reminder & Res Card skills:

1. When a customer inquires about a trip, search for profile to update or create new profile, and click on Res Card link on menu bar to create a new Res Card.
 - *Agent Name* required
 - Status *Active* defaults
 - Select *Reservation Cycle*, “Under Consideration” or “Lead”
 - Give trip a name & identify *Region* and *Destination*
 - *Apply* to save the Res Card
2. Click the Activity Link and Add to create Reminder for trip follow-up:
 - Set a follow-up date
 - Select subject, *Trip Inquiry Follow-up*, from drop-down menu
 - Use the alarm (optional)
 - Save Res Card
3. Every day open Activity Manager and your *New Trip Inquiry Follow-ups* appear on your *To-Do List*.
4. Close a Reminder by either rescheduling it (if appropriate) or checking the *Completed* field.

Res Card with Activity Created, and suggested fields filled out:

Leisure - Young/Patrick Res Cards ✕

Patrick Young 2498 Poe Road Seattle, WA 43402	Cell: +1 (419) 787-2876 E-mail: pyoung@gmail.com Cell: +1 (213) 467-7154 E-mail: maryellen@hotmail.com	Marketing Codes: 23 Primary Traveler: Young/Patrick Ric... Groups: RCCOASIS16	Primary Agent: Beth Vollmar Created: 3/18/13 Salutation: Pat Interface ID: 2137321832 Profile No.: 17392769
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Remarks: Top 50 Client; Nickname: 'Pat', Related to Vicki Allison

About
Young/Patrick

- General Info
- Communications
- Remarks
- Marketing Codes
- Travelers
- Activities

Res Cards - Summary Switch to Detail View PASTE - Create Res Card -

Filters


All Res Cards Active Departed Cancelled

	Res Card No.	Status	Trip Locator	Trip Name	Create Date	Region	Trip Source
View ⚙	15494972	Active					
View ⚙	15395213	Active					

SAVE CANCEL

Res Card

Agent: [-- Select Agent --]

Create Date: 

Branch:

Status:

Reservation Cycle: -Reservation Cycle Sel-

Marketing Source: -Marketing Source-

Group: -Group Sel-

Region: -Region Sel-

Destination: DESTINATION

Prepared for: ...

Trip Name: x Locator No.

Res Cards Global Saved Searches Personal Saved Searches

Merge Options Generate Invoice Trip Proposal PNR Live Connect Note Mailer **Reminders**

Res Card - Young/Patrick General Info

Res Card No.: 17910515 Agent: Beth Vollmar Trip Name: Anniversary Cruise
 Res Total: 0.00 Status: Active Trip Start Date:
 Invoiced Total: 0.00 Res. Cycle: Lead Trip End Date:
 Balance: 0.00

About this trip:

- General Info
- Travelers
- Reservations
- Invoices
- Itinerary Report
- Activities
- Attachments
- More Fields

General Info

Create date: 9/8/17 Prepared for: [17392769] Young/...
 Agent: Beth Vollmar Trip Name: Anniversary Cruise
 Status: Active Locator No.:
 Reservation Cycle: Lead Region: Bermuda & Caribbean
 Marketing Source: E-Blast Destination: Caribbean - Eastern
 Group: Trip Start Date:
 Branch No.: [0] Jet Set Travel Trip End Date:

Create Reminder EDIT

SAVE **CANCEL**

Reminder General Info

Date of Reminder: 09/08/2017 Calendar

To Do (Timeless)

Start Time: 01:15 PM -Time Sel-

Duration: 5 minutes -Duration Sel-

Login Name: BETH -Login Sel-

Create Date: 09/08/2017

Completed
 Set Alarm
 Update E-mail Calendar after Saving Changes
 E-mails will be sent to your address: beth.vollmar@sabre.com (You can change your e-mail address on the My Login page.)

Reminder

Reminder Type: Task -Reminder Sel- Priority: Medium Private

Subject: Trip Inquiry Follow-Up -Subject Sel-

Select the Activities Manager to see Reminders:

ClientBase Online PROFILES **ACTIVITIES** RES CARDS

Activities Global Saved Searches Personal Saved Searches

Merge Options Create New: Profile Res Card Note Mailer Reminder

Beth's Open Reminders by Date

Find Activities by...

Login Name: BETH Select: Open Reminders Only

From Date: To Date:

FIND **RESET** GO TO ADVANCED SEARCH

COUNT First | Previous | Next | Last | Select Columns | Sort by Columns | Saved Searches

	View	Settings	Login/Created Name	Type	Name	Activity Date/Time	Subject	Reminder/Mailer Type	Duration	To Do
	View	⚙️	BETH	R	Young/Patrick	9/6/17 9:00 AM	Welcome Home	Phone Call	15	N
	View	⚙️	BETH	R	Young/Patrick	9/16/17 9:00 AM	Check for Documents	Task	15	N
	View	⚙️	BETH	R	Young/Patrick	09/30/17	Change RES Card status to DEPARTED	Task		Y
	View	⚙️	BETH	R	Young/Patrick	10/15/17	Commission Due	Commission Due	0	N
	View	⚙️	BETH	R	Young/Patrick	10/15/17 9:00 AM	Welcome Home	Phone Call	15	N