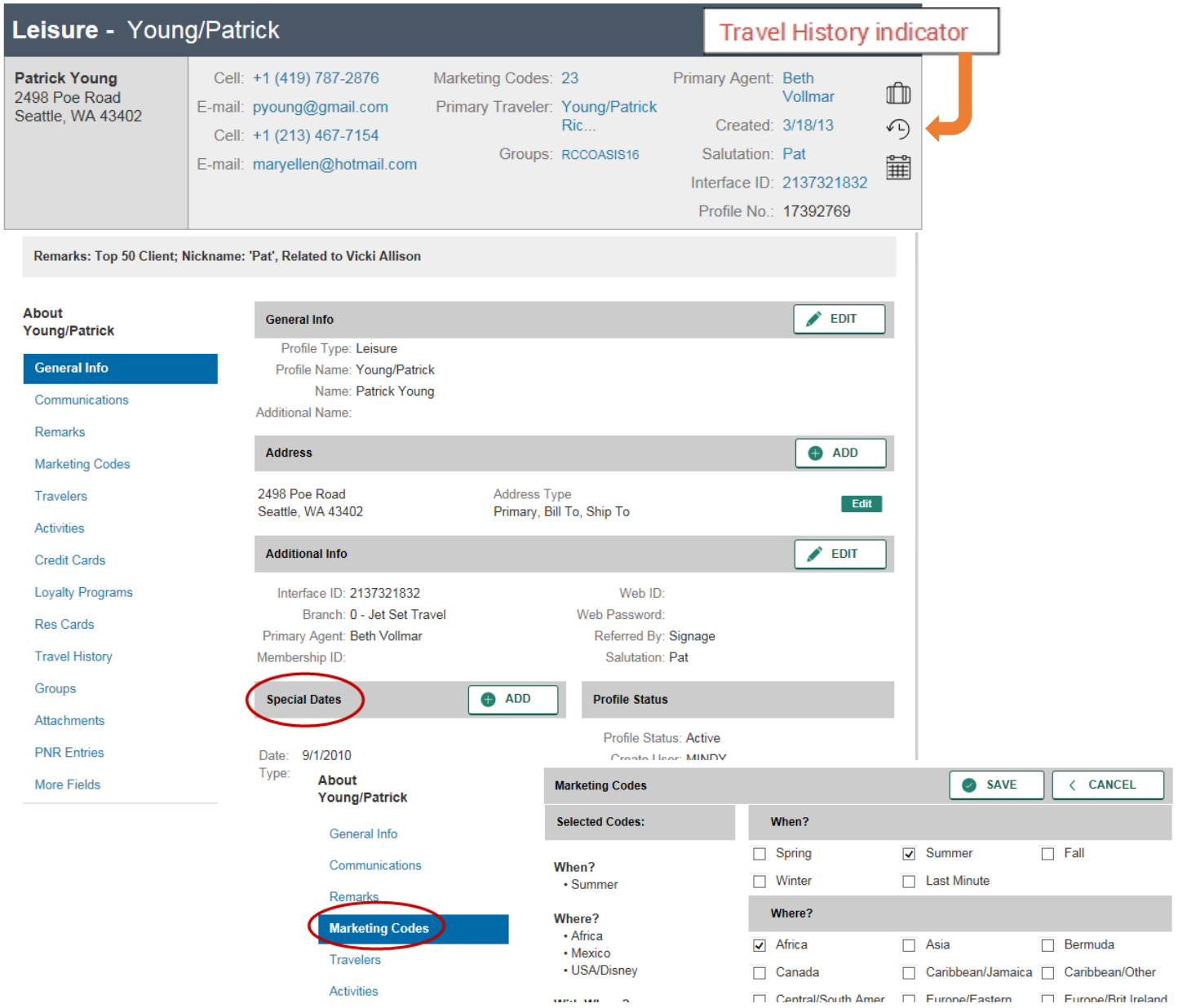
Unleashing the Power with the Profile Manager

At the heart of *ClientBase Online* is the Profile Manager. From this window, view, sort and manage all the client, agent, or vendor information, or manage relationships with prospective clients and vendors. This is where many agents spend most of their time - accessing and updating data. In the past, a potential customer has called your agency, but never made it into the "system" because they did not book a trip. With ClientBase *Online*, turn prospects into lifelong customers by tracking these potential clients, taking ownership of them and including those in future marketing programs.

Example: Patrick Young calls to plan a surprise getaway with his wife, Mary, for their upcoming anniversary. After locating his profile, you notice the Travel History indicator notifying you that Patrick has booked travel with the agency in the past. You quickly check their past travel history, and then glance at their marketing preferences and with this information you are able to suggest just the right travel package. He appreciates your knowledge of their needs, which is why he books through you again and again. Oh, and while you are in their profile, you quickly capture the date of their anniversary in the *Special Dates* table, so next year you can initiate the idea of a romantic getaway.

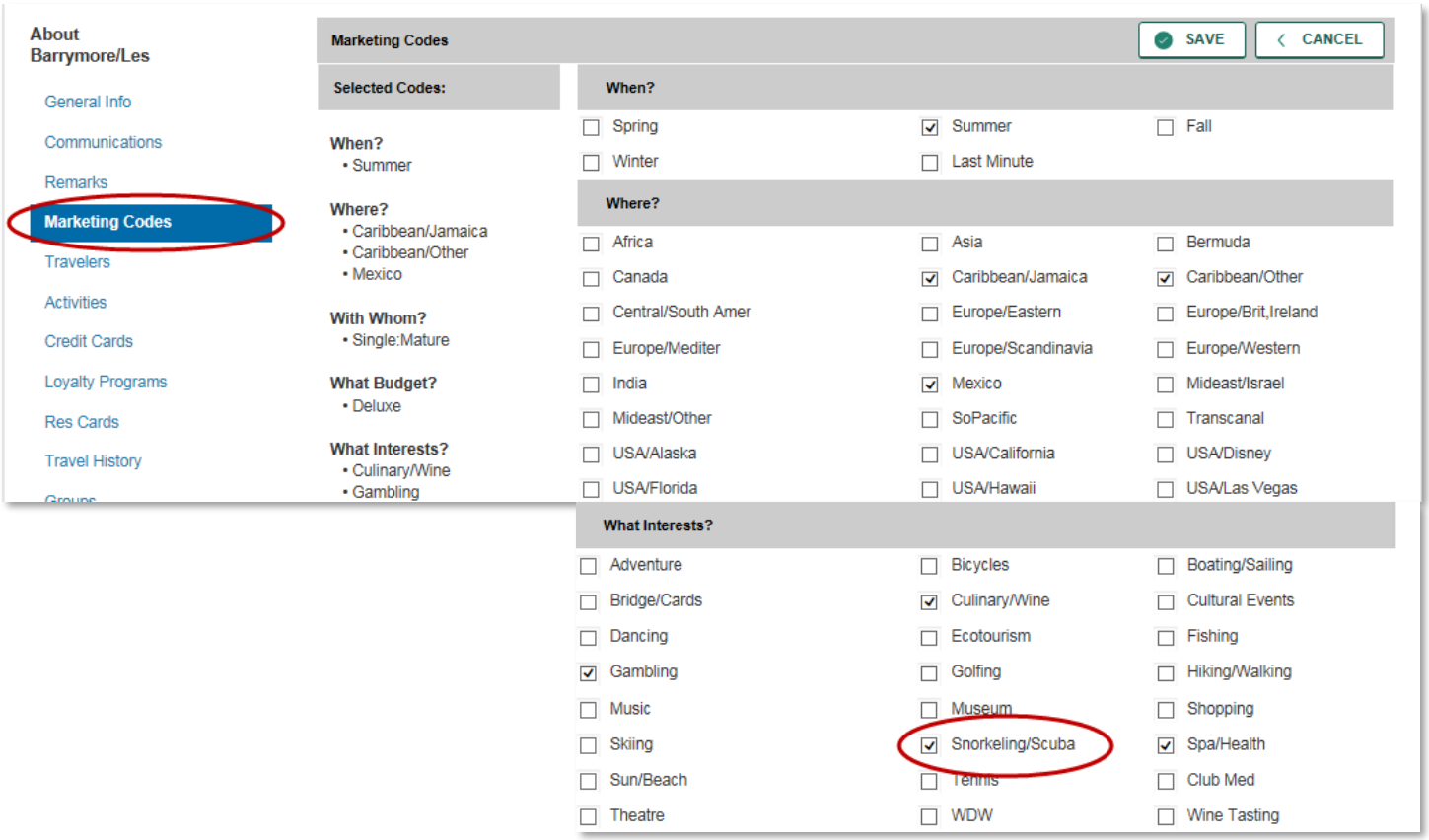


Streamline Marketing with Marketing Codes

The Marketing Tables in *ClientBase Online* help you identify each of your customer's unique travel preferences, interests and demographics, while at the same time automatically grouping your clients with common codes. Since qualifying a customer for a leisure vacation can be the toughest part of selling leisure travel, access to this valuable information might just make the difference between closing a sale or losing it. These Marketing Codes make it possible to consistently offer the right product in front of the right client by both front-line agents and any marketing programs geared towards generating travel interest.

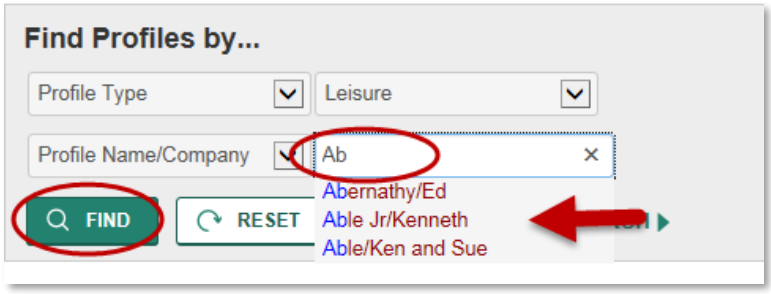
In addition, labels, letters, and e-mails are quickly created to link clients and travel preferences when a "hot" travel special lands on your desk. A master set of marketing tables appears in every client's profile under the *Marketing Codes* link. Eight of these tables come with pre-defined default codes, but all of them can be customized to meet your agency needs. With a simple point-and-click with the mouse, every agent selects from the same list, and that means client consistency and agent simplicity.

Example: Les Barrymore calls in and requests some information on a trip to the Cayman Islands. He read about the great destination in his favorite *Scuba Weekly* magazine and figures it would be a great place for a honeymoon (may as well squeeze in some diving). By clicking on the Marketing Link in Les' profile, the agent easily places a checkmark in the box next to *Scuba/Snorkel* under the *What Interests?* Table. Now, when your agency has a scuba or snorkeling-related trip to promote, rest assured that Leg will be included among the other qualified clients you are tempting with the great deal!



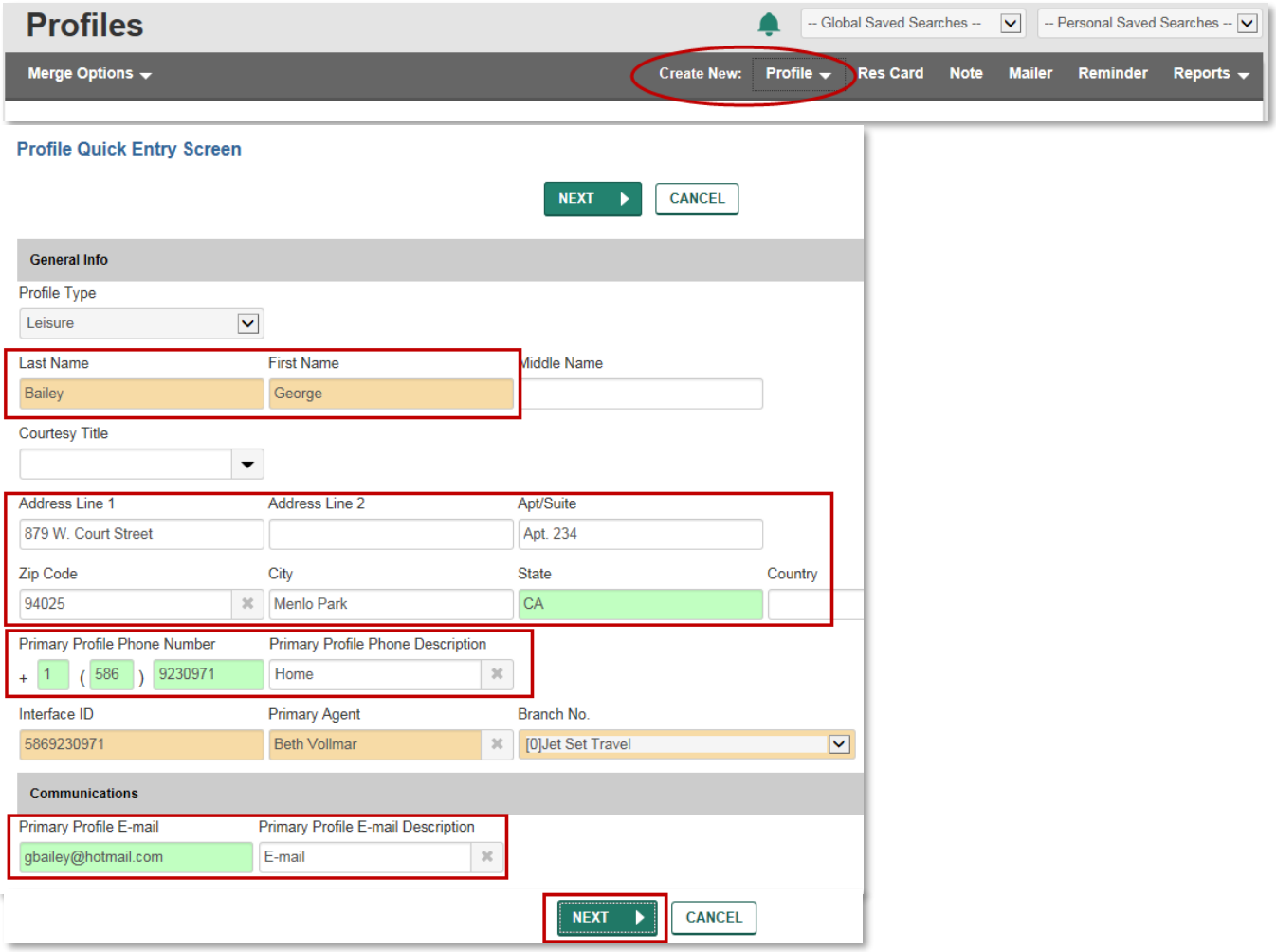
Steps for successfully using Profiles

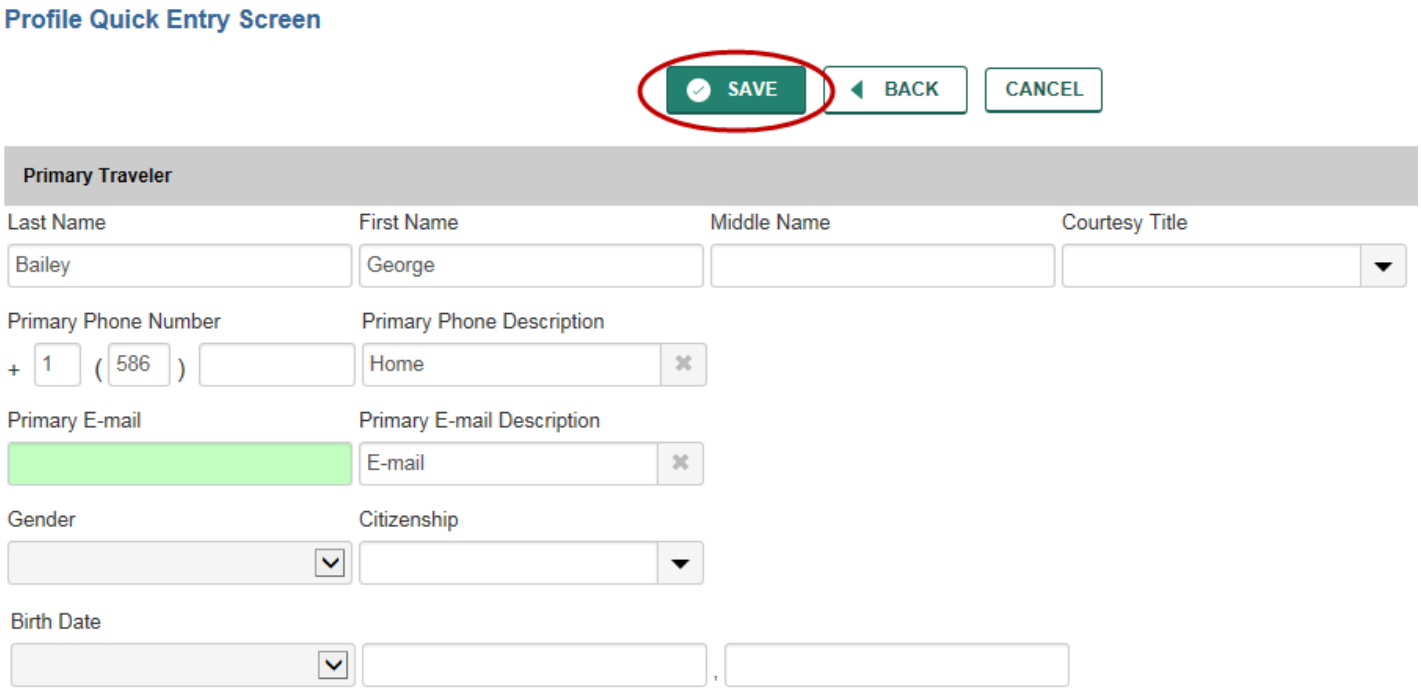
1. **With every customer contact, search for profile** by name by entering the first few letters of the last name in Profile Name field.



2. If listed, click on the name, click *find*, click *view* and verify profile data in header. Click ***General Info*** to update any information. Next add any travelers for this profile by clicking ***Travelers,*** clicking ***Add*** and add first name, last name, middle name, birthday, citizenship, passport, credit card, and frequent flyer numbers.

3. If **NOT FOUND**, click on Create New: Profile on the menu bar and add either Leisure Profile or Corporate Profile. Minimum required is Name, address, phone number and email if you can get it. Click *Next*.

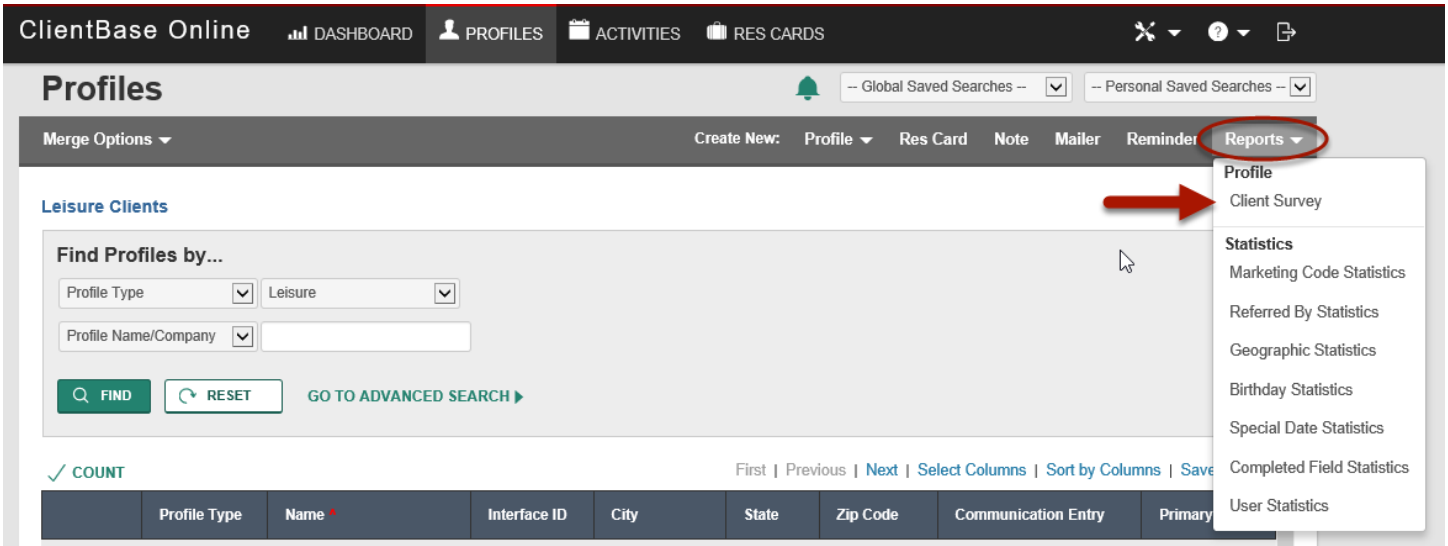




Steps for successfully using Marketing Codes:

1. With every customer contact, search for profile and update customer information or create a new profile.

2. As you are talking with the client, if there is anything checked off in the marketing table, use this information to qualify the customer.

3. If a client books or inquires about a particular trip, click the marketing code that reflects this interest for future marketing.

4. If a client is waiting for you while you check availability, print out a client survey and ask for an update of his/her travel preferences. That's a great way to quickly add new Marketing Codes to your database.