

Unleashing the Power with the Profile Manager

At the heart of *ClientBase Windows* 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 Windows*, turn prospects into lifelong customers by tracking these potential clients, taking ownership of them and including those in future marketing programs.

Example: Steve Rosen calls to plan a surprise getaway with his wife, Barbara, for their upcoming anniversary. After locating his profile, you notice the Travel History indicator notifying you that Steve 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 Point-and-Click Codes

The Marketing Tables in *ClientBase Windows* helps 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* tab. 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: Greg Burdan 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 Tab in Greg's 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 Greg will be included among the other qualified clients you are tempting with the great deal!

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| Mr Greg Burdan 2430 N. Baker St. Santa Ana, CA 92679 | Home: +1 (714) 892-8282 Email: gburdan@fun.com E-mail: Gburdan37@yahoo.com | Marketing Codes: 7 Primary Traveler: Burdan/Lee Groups: | Primary Agent: Created: 10/11/2012 Salutation: Interface D: Profile No.: 223 |
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Steps for successfully using Profiles

1. With every customer contact, query (search) for profile by last name. Enter the first few letters of the client's last name next to the Profile Name/Company field. Note: If your filters do not default to Profile Name/Company, you can select that option in the drop-down box.

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

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| | | | Frequent Flyer | 1K | | | Use Global PN | Delete |
| | | | Car Program | Hertz | | | Use Global PN | |
| | | | Hotel Program | Hilton Hotels | | | Use Global PN | |

| General Communications Address Advanced Traveler Info Carde Travel Preferences IR Entries Associated Profiles Air Delta Air Lines Air Preferences Air Preferences Inited Airlines Air Preferences Inited Airlines A Car Class of Service Seat Type Inited Airlines Inited Airlines A Car Class of Service Inited Airlines Inited Airlines Cars Class of Service Inited Airlines Inited Airlines Cars Class of Service Inited Airlines Inited Airlines Cars Class of Service Inited Airlines Inited Airlines Air First Class Aisle Aisle Hotel Business Class Window Window | Web Site: www Home Phone: +1 (Cell: +1 (E-mail: kabl | v.ableenterprises.com 408) 766-2301 408) 766-9856 e@gmail.com | Salutation/Nickname: Relationship to Profile: Primary Age: 51 Primary Traveler: Yes | Associated Profiles: ABC Manufacturing Able/Ken | Ĩ |
|--|--|---|--|--|---|
| Hiton Hotels Conomy Tour Premium Economy General Meal Code Vegetarian Arcraft Type Special Options Special Options | General Communications Address Air Delta Air Lines Car Car Cruise Cruise Hitra Rent A Car Hertz Rent A Car Hitra Hitron Hotels Hitron Hotels Hutt Tour General Car Communications Address Address | Advanced Traveler Info Air Preferences Class of Service Unknown No Preference First Class Business Class Business Class Premium Economy Meal Code Aircraft Type Special Options | Carde Travel Preferences OR Entries | Associated Profiles | |



3. If **NOT FOUND**, click on the Profile Icon in toolbar and add either Leisure Profile or Corporate Profile. Minimum required is Name, address, phone number...& e-mail if you can get it!

| Profile Manager | | | | | | | | | | | | | |
|-----------------|---------|--------|----------|----------------|---|-------|-------|--------|------|-------------|---------------|-------|--------|
| Profile Remi | nd Note | Mailer | Res Card | ₩ Inventory | • | Print | Label | Letter | PNR. | D E-mail |)15 Glance | Go To | Delete |
| Leisure | | | | | | | | | | | | | |
| Corporate | | | | | | | | | | | | | |
| Vendor | | | | | | | | | | | | | |
| Agent | | | | | | | | | | | | | |
| Other | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |

Steps for successfully using Marketing Codes:

1. With every customer contact, query (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 inquiries 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 on availability, print out a client survey and ask for an update of his travel preferences. That is a great way to quickly add new Marketing Codes to your database.

| Circitobase Sabre Havern | neurone (Nore/Reinica) easonej | |
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| 🔠 File Edit Reports M | Verge To Workstation Defaults Global Defaults Utilities Windows Help | _ 8 × |
| Leisure | 15 / 49 編 🎢 🖳 🗒 🚿 🔲 🔗 🕱 | |
| | Remind Note Mailer ResCard Receipt Print Label Letter PNR E-mail Q-View | |
| (Mr. Kenneth David Able) | Home Phone: +1 (650) 989-222 Marketing Codes: 20 Primary Agent: Sharon Meyer | |
| 1257 Orange Street | Cell: +1 (650) 2 4 Primary Traveler: Able/Kenneth David Created: 10/21/1997 | |
| Los Altos, CA 94022 | Business - Ken: +1 (650) 55 55 66 66 67 67 67 67 67 67 67 67 67 67 67 | |
| | Home - Los Angeles: +1 (310) 55 34 Derivet Travial Supravious Home - Interface ID: 6509881222 | |
| | Email: kable@ear k.r FIIIIt ITavel Sulvey Here Profile No.: 384 | |
| General Info Communications | a Remarks Marketing Travelers Activities were History Cards Res Cards Payment History Attachments PNR Entries More Fields Groups Bes Card Bemarks | |
| 4 1. When? | 1 When? 2 Whee? 3 With Whom? 4 What Tune? | |
| - Fall | Spring Africa | |
| ▲ 2. Where? | Asia Single: Mature Package | |
| - Bermuda | Virber Vermada ingle Sriutzen FIT | |
| Canada | Last Minute Canbbean/Jamaica Coopie:/Mature Tour-NonEsc | |
| - Caribbean/Other | Caribbean/Other Cupie:SrCitizen Z All-Inclusive | |
| - Europe/Eastern | Central/So America = Family Young Visits Friends/Helat | |
| Europe/Mediter | Europe/Rritiend Grandparents | |
| - Europe/Scandinavia | Europe/Mediter | |
| - SoPacific | Europe/Scandinavia Europe/Scandinavia | |
| ■ 3. With Whom? | Lucipe // western | |
| Couple.mature | Mexico | |
| - Cnise | Mideast/Israel | |
| All-Inclusive | ■ Mideastrumer | |
| ↓ 5 What Interests? | | |
| Adventure | 5. What Interests? 6. What Budget? 7. Client Status 8. Client gifts | |
| Culinary/Wine | Adventure Economy Advocate Wine | |
| — Skiing | BostingSaling Deluxe Pied Piper | |
| - Sun/Beach | Bridge/Cards Prospect | |
| - Theatre | CulinaryAvne VP | |
| ■ 6. What Budget? | | |
| - Deluxe | | |
| 7. Client Status | Fishing | |
| - Client | Golfing | |
| | Hiking/Walking | |
| A · 8. Client girts | Music | |
| I ravel diary | Nuseum Shoroing | |
| | Ki Ski | |
| 1 | Sking - | |
| | | |
| | | |