ClientBase QuickStart Training Program

We at *Trams* and *ClientBase* Products and Services, feel strongly that the easiest and fastest way to get *ClientBase* up and running is to assign an In-House Trainer to implement the program. We suggest this trainer attend our live WebEx *ClientBase General Overview* and the *Starting with the Basics* classes which were intentionally designed to go hand-inhand with this program. If you need help setting up the program before you start training, e-mail **Support@TresTechnologies.com**.The enclosed 5-step all-inclusive training program is designed to help the In-House Trainer successfully train agents on the 5 basic *ClientBase* concepts:

Packet One: **Learning Basic Profile Skills**

Packet Two: **Learning Merge to PNR**

Packet Three: **Updating Marketing Codes**

Packet Four: **Getting Started with Res Cards and Reminders**

Packet Five: **Enhanced Res Card Skills**

How Does the In-House Trainer Begin?

The following steps outline how to use each of the 5 training packets:

1. **Overview** – Each training packet starts with a general overview of the skills that will be covered. Read this overview before starting each concept.

2. **Class Outline** – To help you train your agents on each skill, a class outline of the material to review is included

3. **Agent Handouts** – Practice makes perfect. After training your agents on a skill using the class outline, agent handouts are provided including "Cheat Sheets" and practice drills.

4. **Monitor Results** – This is probably the most important part of the training program. The only way to ensure your agents "get it" is to track results. This section gives you queries and reports for you to see who's caught on and who needs help.

5. **Additional Resources** and **Skill Enhancement** exercises are also included at the end of each packet.

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Packet One: Learning Basic Profile Skills

Overview

In many agencies' client information is stored in many different locations. With *ClientBase*, you now have a tool that centralizes all client data into a single location and makes that information accessible to everyone via a client profile.

In this first packet, **Learning Basic Profile Skills**, you are teaching the agents to master the following Profile skills:

- **How to launch ClientBase and toggle between other programs.**
- **How to begin doing Level 1 Lookup (Query) using Client Search Folder.**
- **Start a new profile.**
- **Update existing profiles.**
- **Complete key profile fields:**
  - **First Name**
  - **Last Name**
  - **Courtesy Title**
  - **Primary Address**
  - **Primary Phones/E-mails**
  - **Interface ID (if agency requires)**
  - **Salutation**
  - **Travelers (Names, Credit Cards, Frequent Flyer Numbers, TSA required information)**
  - **How to use Travel History to view past client travel.**
  - **How to use OK/Cancel/Apply.**

Learning Basic Profile Skills Class Outline

After setup, you are ready to hold a staff meeting. (**Important! Please have your agents attend the *General Overview* live WebEx class (register or join from https://clientbase.webex.com/ as a prerequisite to this training session.)** Photocopy, pass out *Agent Handouts,* and teach Basic Profile Skills:

Brief introduction from Owner or Manager: What is *ClientBase* and why is it important to us as an agency? This is a pep talk, buy-in, demonstrating enthusiasm for the program. **(3 - 5 Minutes)**

In-House Trainer Intro: How does *ClientBase* benefit agents? **(3 Minutes)**

- Helps me organize my daily routine
- Instead of having client info in lots of places, I can now access it from just one place
- Helps me remember more about my clients
- Helps me qualify my clients
- Everyone knows which clients are mine
- Easier for others to help my clients o Service my clients better
- Saves me time
- Makes it possible for agency to market effectively and drive profitable business in through the doors
- My agency thrives

In-House Trainer Discussion: How do I log into *ClientBase* and toggle between multiple applications? **(2 Minutes)**

In-House Trainer Discussion: What is a profile? **(3 Minutes)** In today's marketplace travel agents are finding a need to shift their focus away from just being order takers and processing transactions. A profile is a folder that contains all traveler information.

In-House Trainer Demonstration: How to look up a profile using Client Search folder, and update profile fields. Bonus: Click on Travel History tab to view what travel client has done in past! **(2 Minutes)**

I**n-House Trainer Demonstration:** How to create a new profile, complete fields and review concept of auto-fill fields set by the agency**. (12 Minutes)**

- First Name
- Last Name
- Courtesy Title **(auto-fill field)**
- Primary Address **(auto-fill fields including concept for defined zip codes, city and state)**
- Primary Phones/E-mails
- Interface ID **(if agency requires; auto-fill field or how to use if not an auto-fill field)**
- Salutation **(auto-fill field)**

- Travelers (Legal Names, Credit Card Numbers Frequent Flyer Numbers and TSA required information.)

In-House Trainer Demonstration: How to use OK/Cancel/Apply. **(1 Minute)**

Q & A Session. (Cap at 5 Minutes)

In-House Trainer Hands On (10 Minutes): Have agents practice new skills by calling up existing profiles and creating new ones by using role- playing (see Agent Handouts). You may want to just do a few of these, and let agents practice by on their own.

In-House Trainer Sets Expectations (3 Minutes): Show agents the User Stats Report, and suggest initial goals and how it will be tracked. For example, if on average an agent talks with 15 customers a day, 10 updates a day might be expected.

Disorganized?
Over worked?
Wasting time looking for files, phone numbers and information?

ClientBase Can Help

Unleashing the Power with the Profile Manager

At the heart of *ClientBase* 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*, 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.

Cheat Sheet
Agent Profile Basic Skills

Steps for successfully using Profiles

1. **With every customer contact, query (search) for profile** by name in Global Folder entitled *Client Search.* Enter the first few letters of Profile Name in field that says *Enter Name Here* or Traveler/Contact Name Last Name in the associated field.

2. If **FOUND**, 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.

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!

Sample General Info Tab
Fields to Complete

Sample Communications Tab
Fields to Complete

Sample Traveler Tabs to Complete

Let's Practice!

Exercise #1: Role Play

Partner up with another agent in your office and practice different methods for finding who you are talking with on the phone.
- o   Example 1: Hi my name is Susan Anderson, and your name is?
- o   Example 2: Query for the client's profile. If they are in the system, say "I see you've booked with us in the past (using the Travel History folder). Are you still at this address?   Is this still your phone number? I see I don't have an e-mail for you, may I have that please?" (This way the client thinks you "remember" them.) If not in system, create a new profile by saying, "Can I get your name and your phone number please? "

Exercise #2: Clean up your top 50 customer profiles! (If none exist, see Exercise #3).

Clean up your top 50 client profiles making sure they have proper addresses, e-mails and other items taught to you in *Learning Basic Profiles.* Use your client list, make some phone calls, or use other resources to update these profiles for you and your agency's marketing program.

Exercise #3: Create Your Top 20 Profiles if None Exist in *ClientBase*

If no profiles exist in *ClientBase*, create new profiles for your top 20 customers, and fill out the fields you learned about in this lesson.

Learning Basic Profile Skills Monitor Results
(Inspect What You Expect!)

After you have taught agents basic profile skills, use reports to monitor their progress. Review and discuss results with agent as soon as possible:

Query daily for previous day's newly updated profiles (use *Profiles Updated Yesterday* folder you created in setup).

- **Run Reports to check agents' progress (see samples below)**

   User Stats Report on Profiles Updated: Click saved folder, *Profiles Updated Yesterday*, and go to **Reports|Profile Reports|Statistics|User Stats** to run report showing profiles created and modified with a total number of updates by User.

   Completed Fields Reports on Profiles Updated: Click saved folder, *Profiles Updated Yesterday,* which contains modified profiles together with any new profiles agents created the day before, and go to **Reports|Profile Reports|Statistics|Completed Fields** to run report showing per user which fields were completed with percentages.

- **Publish User Stats daily for all to view (for agent accountability).**

- **Review profile skills with those agents who need help.**

- **Randomly select an agent to sit with and observe their usage.**

| Sample User Stats Report on Profiles Updated Yesterday | Sample Completed Fields Report on Profiles Updated Yesterday |

Learning Basic Profile Skills Additional Resources

Here is a list of additional resources available from *Trams* and *ClientBase* Products and Services to help you and your agents learn basic profile skills:

For the In-House Trainer:

1. From *ClientBase* program, click **Help Files|Contents:**
   a. Read *Set Up ClientBase for Your Agents*
   b. Read *An In-Depth Look at Client Profiles*

For the Agents:

1. From *ClientBase* program, click **Help Files|Contents**
   a. Read *An In-Depth Look at Client Profiles*

Learning Basic Profile Skills Enhancement

As agents become more comfortable in entering basic profile information, you may want to teach them additional skills:

- **How to enter Second Addresses**

- **How to enter Bill To/Ship To/Additional Addresses**

- **How to enter different communication entries and link to specific traveler names**

- **How to enter Special Dates**

- **How to associate cards with specific traveler names**

- **How to use Referred by field**

- **How to enter additional information for Travelers:**
  -Birthday
  -Passports
  -Communication Entries
  -Traveler Preferences

- **How to enter basic information to Marketing Tab**

Packet Two: Merge to PNR Skills

Overview

You will discover that your database grows rapidly once your agents are trained on the practical applications of *ClientBase*. Using Merge to PNR provides an everyday tool that demonstrates the value of the program to your agents. In this second packet, **Learning Merge to PNR**, you are teaching the agents to master the following associated skills:

How to toggle back and forth between the GDS and *ClientBase*.

How to initiate the Merge to PNR process using one of two methods.
- o Start in the GDS by checking availability and booking flights. Toggle into *ClientBase*, display or build a new profile and merge customer data to the PNR.
- o Start in *ClientBase* and search for profile. Display or build a new profile and merge data to PNR. Toggle into GDS to check availability and book flights.

How to use the Merge to PNR Feature.
- o **Selection Screen**
  - • How to use the Merge to PNR feature *Selection Screen*
  - • *Always Move/Optional Move* selections
  - • Dragging travelers to desired PNR name field position
  - • Click *Next*
  - o **PNR Preview Screen**
  - • Update in GDS format
  - • *Send to PNR*

How to toggle and review merged data in PNR.

Learning Merge to PNR Outline

In-House Trainer Demonstration: Step-by-step how to *Merge to PNR*. (8 minutes)

- o   Search for profile either prior to doing availability in GDS, or after.

- o   Verify client data and that a Bill To/Ship To address exists.

- o   Merge to PNR.

- o   Review Selection Screen. Select and unselect as desired.

- o   Show how to move passenger to desired PNR position by dragging and dropping.

- o   Review *PNR Preview Screen*, explaining how to make changes.

- o   *Send to PNR* and explain process of clipboard or API.

In-House Trainer Demo: How to toggle back to GDS to review merged data, check for errors, and display PNR. **(2 minutes)**

Q & A Session   (Cap 5 minutes)

In-House Trainer Hands On: Have agents practice new skills by merging to PNRs (see Agent Handouts). **(10 minutes or have them do one or two, then practice on their own.)**

In-House Trainer Sets Expectations: Expectation is that all PNRs will now be created from *ClientBase*. (**1 minute**)

Disorganized?
Over worked?
Wasting time looking for files, phone numbers and information?

ClientBase Can Help

Cheat Sheet
Merge to PNR

Save Time and Duplication with Merge to PNR

No more multiple entries or databases! *ClientBase* provides the ability to move customer information (maintained in the *ClientBase* profile) to your reservation system's PNR. This feature works with Amadeus, Apollo/Galileo, Sabre, and Worldspan. Sit back and watch your database grow and watch yourself become more efficient by using your marketing database to build PNRs. You'll be surprised at how quickly existing customer information gets updated, and how quickly new customer information gets added to your marketing database, when agents use it as their source for building PNRs. Also, watch your customer loyalty grow as agents access customer information when building PNRs for your leisure clients, rather than repeatedly asking them for the same information

Example: Michael Blue calls your agency to book some flights to Paris. You first locate Michael's profile in your marketing database *(ClientBase)* and verify current address and phone information. Once confirmed, click the Merge to PNR button and within moments you have the PNR started with all of Michael's necessary information.

Let's Practice!

Role Playing: Team up with another agent. One of you is the customer, and one of you is Merging to PNR:

Exercise #1: Start by checking availability in the GDS and toggle back into *ClientBase* to modify/add new profile information.

o   If customer is in database, ask them if they still reside at this Address, is that still the phone number, may I add your e-mail address? Then *Merge to PNR*. Select the travelers and any information you want to merge to the PNR. Complete the merge and continue the PNR.

o   Repeat exercise, but now customer is not in database. How will you ask for information you need for your customer database?

Exercise #2: Start in *ClientBase* and toggle back into blank PNR to continue availability process.

o   If customer is in database, ask them if they still reside at this Address, is that still the phone number, may I add your e-mail address? Then Merge to PNR. Select the travelers and any information you want to merge to the PNR. Complete the merge and continue the PNR.

o   Repeat exercise, but now customer is not in database. How will you ask for information you need for your customer database?

1. Example 1: Hi my name is Susan Anderson, and your name is?
2. Query for the client's profile. If they are in the system, say "I see you've booked with us in the past. Are you still at this address? Are you still at this phone number? I see I don't have an e-mail for you, may I have that please?" (This way the client thinks you "remember" them.) If not in system, create a new profile by saying, "Can I get your name and your phone number please? "

Merge to PNR Skills Monitor Results
(Inspect What You Expect!)

After you have taught agents basic Merge to PNR skills, use reports to monitor their progress. Review and discuss the results with agents as soon as possible:

In *Trams Back Office* (or any back office program) run a UDID report with appropriate parameters to track how many agents have been using Merge to PNR from *ClientBase*.

o In TBO, go to **Reports|Report Generator|Print Report,** and select *Client Activity Detail Report*. Put in date parameters (day before) in *Issue Date Range* From & To. Under the Advanced Tab, Select *UDID 5 and is not blank. You can also select one agent or leave the agent field blank and the report will contain all agents.*

o **Publish Report Stats daily for all to view (for agent accountability) using the percentage of PNRs started from *ClientBase*.**

o **Review Merge to PNR skills with those agents who need help.**

o **Randomly select agents to sit with and observe usage.**

Merge to PNR Skills Additional Resources

Here is a list of additional resources available from *Trams* Products and Services to help you and your agents learn basic Merge to PNR skills:

- o **For the In-House Trainer:**
    - From the *ClientBase* program, click Help|Contents:
    - Read *Putting Profiles to Work for You*, see Merge to PNR section

- o **For the Agents:**
    - From the *ClientBase* program, click Help|Contents:
    - *Go to Putting Profiles to Work for You|Merge to PNR*

Merge to PNR Skills Enhancement

As agents become more comfortable in entering using the Merge to PNR feature in *ClientBase*, you may want to:

- o **Create PNR entries at Branch Level.**

- o **Create PNR entries at Agent Level.**

- o **Teach Agents how to create PNR entries and use at the Traveler Level**

- o **Teach Agents how to create PNR entries and use at the Profile Level.**

- o **Explain the significance of the name field association in Profile Cards Tab.**

Packet Three

Updating Marketing Codes

Overview

Tracking your clients' travel preferences is simple when a checklist of marketing codes is available to select from. The Marketing Tab in the *ClientBase* profile makes it easy for agents to check off client demographics and preferences. These codes can then be used for future marketing and to help agents qualify clients for new trips

In this third packet, **Updating Marketing Codes**, you are teaching the agents to master the following skills:

- **Update client profiles with Marketing Codes that reflect travel interests**

- **Profile Marketing Tab Screen**

    o   Scroll up and down
    o   Add/Delete Codes
        o   Use Summary Marketing Code Tree

- **Use Marketing Codes to qualify clients**

- **How to run client surveys and collect information about your clients**

Update Marketing Codes Class Outline

After setup, you are ready to hold a staff meeting. Photocopy, distribute *Agent Handouts,* and teach Updating Marketing Codes:

In-House Trainer Intro: How does Updating Marketing Codes in *ClientBase* benefit agents? (2 minutes)
- o Agency can perform target marketing to get right product to the right customers
- o Helps agents to qualify clients
- o Agents can do target marketing to their own clients
- o Agents can be pro-active with their own client lists to stimulate travel

In-House Trainer Discussion: Review the Marketing Tab screen. (5 minutes)
`
- o Scroll up and down
- o Add/delete codes (explain how and why codes change and value of keeping updated.)
- o Use of the *tree* on the left-hand side of the screen (at a glance, agents can view the interests of the client)

In-House Trainer Discussion: Review of Marketing Categories and Codes. (5 minutes)
- o Review and define any codes that might be open to interpretation
- o Ask for suggestions from agents on what codes they feel are missing

In-House Trainer Discussion: Populating Marketing Tab by Printing a Travel Survey: (5 minutes)
- o What is a travel survey (alternative to asking a series of questions)
- o How to run survey with *Print Only Codes*
- o What it accomplishes (gathers large amounts of information about a client at one time)
- o Valuable for existing client to update or a new client to populate information

In-House Trainer Discussion: Populating Marketing Tab by talking with Client: (8 minutes)
- o During sales process
- o During Welcome Home call
- o Listen during a conversation with a client, take notes, update profile

Q & A Session (Cap at 8 minutes)

In-House Trainer Hands On: Have agents practice new skills by calling up existing profiles and adding codes and by using role playing (see Agent Handouts) **(10 minutes or practice on your own)**

In-House Trainer Sets Expectations: Whenever an agent has contact with a customer and picks up on an interest while booking a trip, doing a welcome home call, or just in general conversation, agent checks off marketing code in Profile Marketing Tab. **(2 minutes)**

**Disorganized?
Over worked?
Wasting time looking for files, phone
numbers and information?**

ClientBase Can Help

Streamline Marketing with Point-and-Click Codes

The Marketing Tables in *ClientBase* 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!
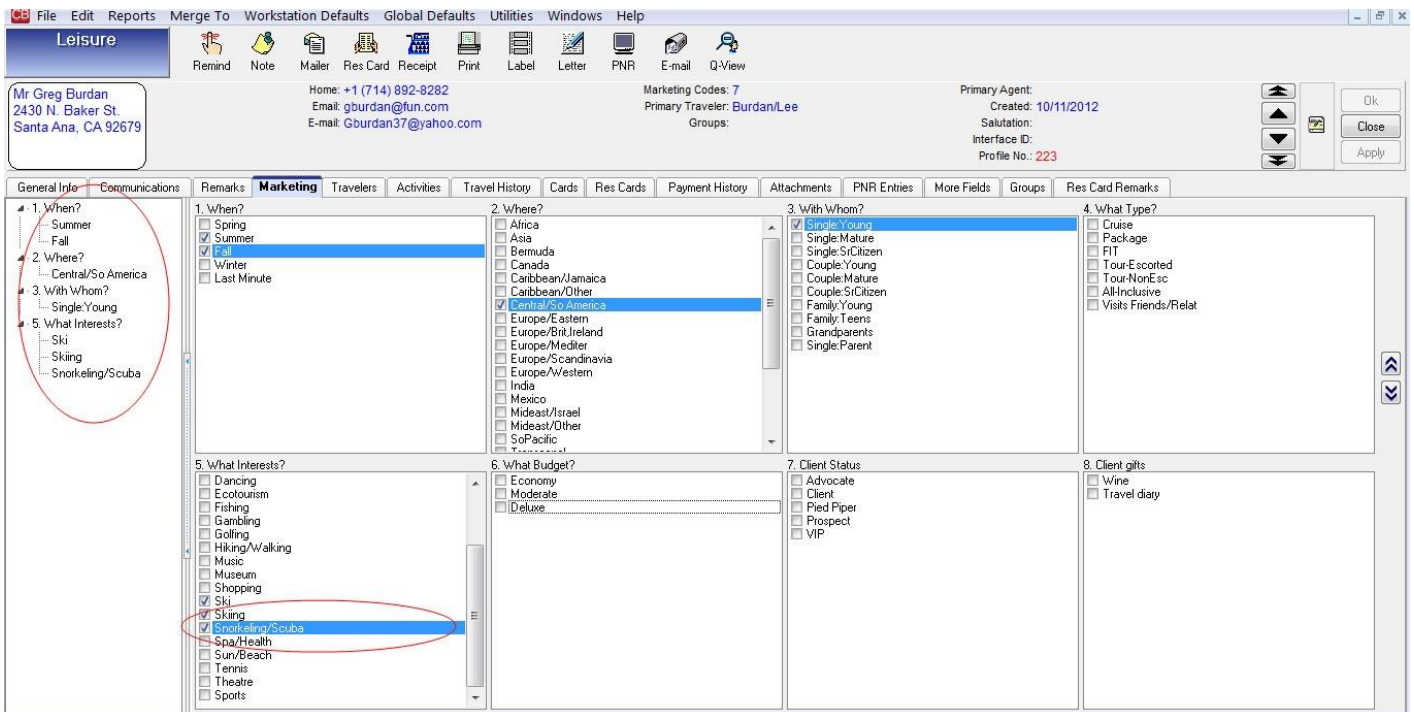
Cheat Sheet

Updating Marketing Codes

Steps for successfully using Marketing Codes:

- o **With every customer contact, query (search) for profile** and update customer information or create a new profile.

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

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

- o 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's a great way to quickly add new Marketing Codes to your database.

Let's Practice!

Exercise #1: Update Marketing Codes

o Query your own Agent Profile, and mark yourself as a married couple, deluxe cruiser who likes to ski, and cruise. Save.

o Now query your profile back up and uncheck ski, and check scuba diving. Watch what happens on the left side of your screen! Save.

o Now query your profile and add/delete any Marketing Codes that really do pertain to you and your

family. o Print out a travel survey on the screen for yourself. Notice what this looks like for what you've

selected.

Exercise #2: Role Play

1. Partner up with another agent in your office who has done exercise #1. Call up his/her profile and practice qualifying the customer by using the Marketing Codes that you see checked off in the Marketing Tab.   o Example 1: I see you like to cruise, are you planning one soon?
    o Example 2: You're a skier. Have you heard about our Aspen Ski Promotion this winter?

2. Reverse roles.

3. Practice a welcome home call with your partner, asking them what they liked and disliked about the recent trip and update the marketing tables as you are talking.

4. Reverse roles.

Monitor Updating Marketing Codes Results
(Inspect What You Expect!)

After you have taught agents how to update marketing preferences, here are some ideas for tracking their progress:

- Randomly select an agent to sit with and observe usage of Marketing Table.
- Review Updating Marketing Codes with those agents who need help.

Updating Marketing Codes Additional Resources

Here is a list of additional resources available from *Trams and ClientBase Products and Services* to help you and your agents learn basic profile skills:

For the In-House Trainer:

1. From *ClientBase* program, click **Help|Contents:**

    a. Read the *In-Depth Look at Profiles|Detailed Review of Folders|MarketingTab* section*, and *Tools for Maintaining a Healthy Database|Global Modify.*

    b. In Index, select *M*. Read *Marketing Categories* or *Marketing* Codes.

For the Agents:

1. From *ClientBase* program, click **Help|Contents:**

    a. Read the *In-Depth Look at Profiles|Detailed Review of Folders|Marketing Tab* section

Updating Marketing Codes Skills Enhancement

As the in-house trainer, here are additional skills to enrich the agency database by adding marketing codes to multiple profiles at one time.

Use Global Modify to add codes to multiple clients

Examples:

- In Level 2 Travel History Query, call up profiles of clients who have traveled with a travel category of Cruise, and use **Utilities|Global Modify** the Marketing Codes with Cruise in those profiles.

- In Level 2 Travel History Query, call up profiles of clients who have traveled with a particular vendor, such as Crystal Cruises, and globally modify the Marketing Codes with Deluxe in those profiles.

- In Level 2 Group Query, call up profiles of clients who have traveled in a particular group and globally modify the Marketing Codes in those profiles to reflect interests of that group. A ski group would all have skiing as a marketing code.

Packet Four

Getting Started with Res Cards and Reminders

Overview

Wouldn't it be great if your agents had a simple way of tracking each new trip inquiry that came into the agency, and a systematic approach to following up to close the sale? Managers could actually see how many inquiries came in on a given day or week, and see the sales follow-up status.   Agents would close more sales. With *ClientBase* Res Card and Reminder features, these tools are now at your fingertips. In this fourth packet, **Getting Started with Reminders & Res Cards**, you are teaching the agents to master the following skills:

How to create Reminders in conjunction with Res Card. Whenever a customer makes a trip inquiry, an agent should:

- o   Update/Create Profile & Create Res Card
- o   *Agent Name* Required; *Active Status* is default
- o   Set Reservation Cycle to *Under Consideration*
- o   Give trip a name & Identify region
- o   *Apply* to save Res Card and stay in it

How to create Reminder in Activity tab of Res Card to follow-up on sale:

- o   Create Reminder
- o   Set a follow-up date
- o   Use subject, *Trip Inquiry Follow-up* from drop-down menu
- o   Use the alarm (optional)

How to create a personal folder within the Activity Manager for each agent. This saved query defaults upon opening the Activity Manager for the agent's daily Reminders.

How to work off a To-Do List and close Reminders with either a reschedule or using *Completed* Field.

Getting Started with Res Cards and Reminders

Class Outline

After setup, you are ready to hold a staff meeting. Photocopy, distribute *Agent Handouts,* and teach Getting Started with Reminders & Res Cards skills:

In-House Trainer Intro: How do Res Card Reminders benefit agents? (2 minutes)

- o Helps me organize my daily routine.
- o Helps me manage the sales process: I'll get alerted when it's time to follow-up on that sales inquiry.
- o Helps my agency determine how many new trips are inquired about on a daily, weekly, monthly basis, and how many of these trip inquiries turn into actual bookings.
- o All details about a particular trip are stored in one place.

In-House Trainer Demonstration: How to create Reminders in conjunction with Res Card.   With every trip inquiry (non-ARC), an agent creates a basic Res Card. What is a Res Card? (5 -8 minutes)

- o Search for Profile
- o Update/Create Profile if none exists
- o Create Res Card
- o Add Agent name if not defaulted
- o *Status* "Active" defaults
- o Select *Reservation Cycle* "Under Consideration"
- o Give trip a name
- o Identify Region/Destination
- o Apply to save Res Card and remain in it

In-House Trainer Demonstration - How to create a Reminder in the Res Card Activity Tab for trip follow-up: **(6 minutes)**

- o Set a follow-up date
- o Explain dated and timed activity vs. to-do timeless
- o Review screen details
- o Select *Trip Inquiry Follow-up* as subject from drop-down menu
- o Use the alarm (optional)

In-House Trainer Demonstration - Show how to find all activities in the activity tab of customer profile. (**2 minutes)**

In-House Trainer Demonstration – How to click Global Folder you set up, *New Trip Inquiries,* click *Filter,* and how to input Agent's own name. Then demonstrate how to save this as a Personal Folder by using **File|Save Query As***.* Each agent saves folder as *My New Trip Inquiry Follow-ups.* **(5 minutes)**

In-House Trainer Demonstration – How to work off a *To-Do* List daily. Either closing the *Reminder* by rescheduling it, or using the *Completed* field to take off the list after it is refreshed. **(3 minutes)**

Q & A Session (Cap at 5 minutes)

In-House Trainer Hands On: Have agents practice new skills by doing exercises and role playing with another agent (see Agent Handouts).   **(8 minutes or have them practice on own.)**

In-House Trainer Sets Expectations: Expectation is that with all new trip inquiries, agents will create a new Res Card and a *Trip Inquiry Follow-Up* Reminder.   **(2 minutes)**

Disorganized?
Over worked?
Wasting time looking for files, phone numbers and information?

ClientBase Can Help

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* 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. Better agent productivity is an important ingredient of a happy and successful agency.)

Example:

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

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

The way that Sharon 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* is click on the *Activities* tab. By default, *ClientBase* queries the database for Sharon'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 Sharon is the most productive agent. It has taken less than one minute for Sharon to review and organize her day with the help of *ClientBase*.

Cheat Sheet

Getting Started with Res Cards & Reminders

Steps for successfully implementing basic Reminder & Res Card skills:

- **When a customer inquiries about a trip, query (search) for profile to update or create new profile, and click on Res Card icon on tool bar to create a new Res Card.**
    - o *Agent Name* required
    - o Status *Active* defaults
    - o Select *Reservation Cycle,* "Under Consideration"
    - o Give trip a name & identify *Region* and *Destination*
    - o *Apply* to save Res Card

- **Click the Activity Tab and Add to create Reminder for trip follow-up:**
    - o Set a follow-up date
    - o Select subject, *Trip Inquiry Follow-up,* from drop-down menu o Use the alarm (optional)
    - o Click *Refresh* to see newly created Reminder
    - o Save Res Card

- **Every day open Activity Manager and your folder,** *New Trip Inquiry Follow-ups* **appear on your** *To-Do List.*

- **Close a Reminder by either rescheduling it (if appropriate), or checking the** *Completed* **field. Click** *Refresh* **to take Reminder off your** *To-Do List.*

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

Click New Trip Follow-up Folder to see Reminders:

Let's Practice!

Exercise #1:

Use your own Agent profile to create a new Res Card, fill in the suggested fields, and create a Reminder to follow-up next week. Set an alarm. Click on your saved folder in the Activity Manager, *My Trip Inquiry Follow-ups* to see this new Reminder.

Exercise #2:

There's a new client on the phone interested in a Bermuda Cruise. Create a new Profile, a new Res Card, fill in the suggested fields, and create a Reminder to follow-up next week. Set an alarm. Click on your saved folder in the Activity Manager, *My Trip Inquiry Follow-ups* to see this new Reminder. Then Delete the profile.

Exercise #3: Role Play

Partner up with another agent in your office and practice how to create a new Res Card with Reminder by using an Agent profile. (Don't forget to ask client if this is correct address, phone number and e-mail.)

Reverse roles.

Monitor Results for Getting Started with Res Cards and Reminders

(Inspect What You Expect!)

After you have taught agents basic creation and use of Reminders and Res Cards, use reports to monitor their progress to review and discuss results as soon as possible:

From the Activity Manager click the *New Trip Inquiry Follow-ups* folder. Go into the filter, do not reset and put in any dates you desire in the Activity Date to run a report (last 2 days, last week, etc.)

   Run Agent Statistics Report to check agents' progress (see sample below):
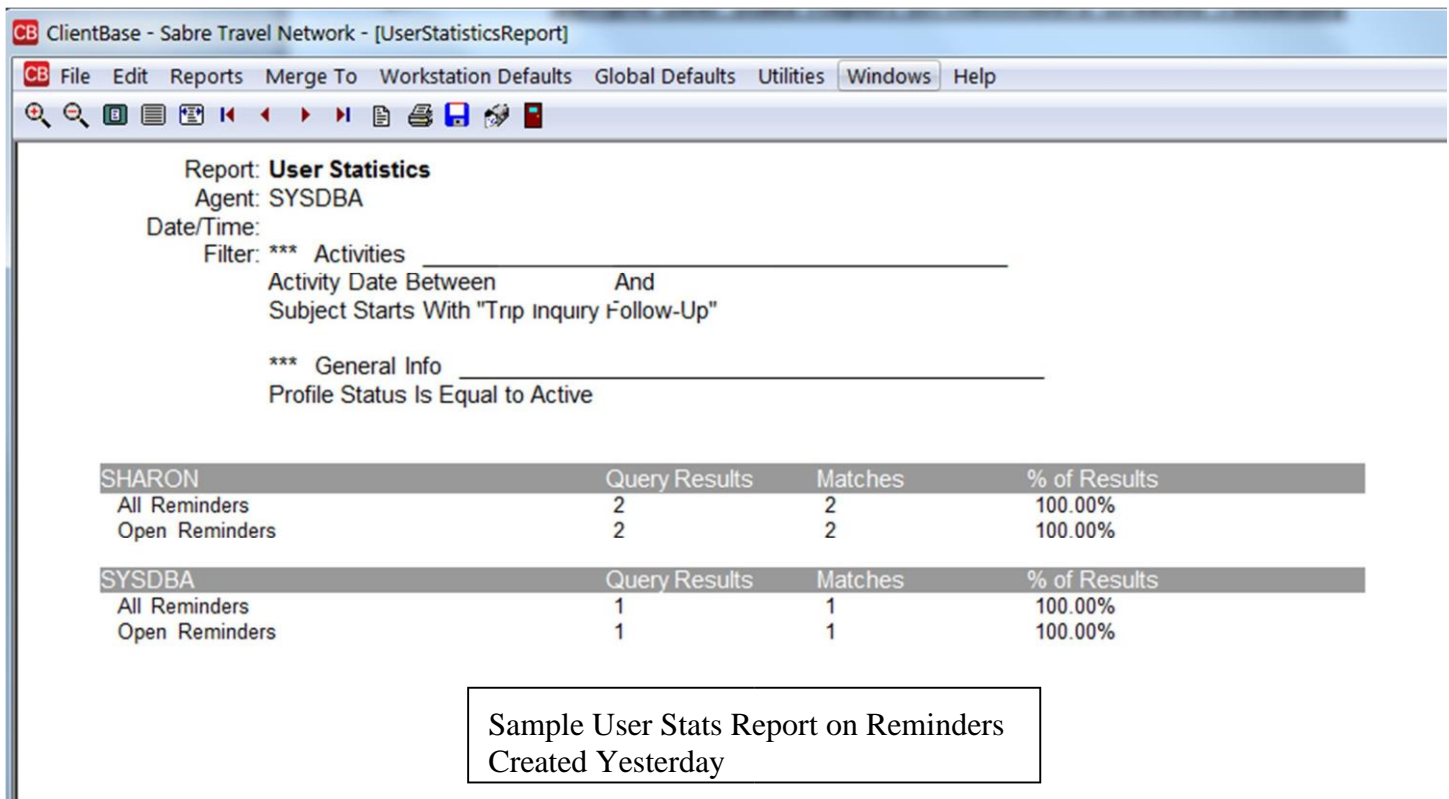
       o Go to **Reports|Activity Reports|Statistics|User Stats** to run report showing per agent what New Trip Inquiries were created yesterday.

Publish User Stats daily for all to view (for agent accountability).

  Review skills with those agents who need help.

Randomly select an agent to sit with and observe usage.

After Agents have learned Packet 5 (Res Cards), you can see how many *Trip Inquiry Reminders* turned into actual bookings. Click the *Closed Trip Inquiry Follow-ups* folder. Jump into the Res Card from the Reminder, and see if the *Reservation Cycle* has been changed to *Booked.*

CB ClientBase - Sabre Travel Network - [UserStatisticsReport]

CB File   Edit   Reports   Merge To   Workstation Defaults   Global Defaults   Utilities   Windows   Help

Report: **User Statistics**
Agent: SYSDBA
Date/Time:
Filter: *** Activities _____
Activity Date Between   And
Subject Starts With "Trip Inquiry Follow-Up"

*** General Info _____
Profile Status Is Equal to Active

SHARON	Query Results	Matches	% of Results
All Reminders	2	2	100.00%
Open Reminders	2	2	100.00%
SYSDBA	Query Results	Matches	% of Results
All Reminders	1	1	100.00%
Open Reminders	1	1	100.00%

Sample User Stats Report on Reminders
Created Yesterday

Getting Started with Res Cards and Reminders Additional Resources

Here is a list of additional resources available from *Trams* Products and Services to help you and your agents learn basic profile skills:

For the In-House Trainer:

1. From *ClientBase* program, click **Help Files|Contents:**

    a. Read *An In-Depth Look at Activities.*

    b. In Index, type in *R* and read the *Batch Reminders* section.

For the *Agents:*

   1. From *ClientBase* program, click **Help Files|Contents:**

   a. Read *An In-Depth Look at Activities*

Getting Started with Res Cards and Reminders Skills Enhancement

As agents become more comfortable in creating and using basic Reminders, you may want to teach them additional skills:

- **How to create Notes**

- **Other Reminder uses**

- **How to add other types of Reminders**

- **How to use At-A-Glance**

Packet Five
Enhanced Res Card Skills

Overview

Now that your agents have been introduced to the *ClientBase* Res Card to manage the sales process, it's time to expand the use of the Res Card for tracking the reservation details once a booking is made, and to use Batched Reminders to manage the trip planning process. In this fifth packet, **Enhanced Res Cards Skills**, you are teaching the agents to master the following skills:

How to find Res Cards they have created
- o   Moving between Reminders and the Res Card
- o   Retrieving Res Cards from the Client Profile

Review General Info Section
- o   Auto-fill fields: Create Date, Agent, Status
- o   How to change *Reservation Cycle* to *Booked*
- o   Bill To and Ship To Addresses

Key Additional Fields in Res Card
- o   Group
- o   Regions and Destinations
- o   Passenger Name – Insert from Profile, and add other travelers

How to Create New Reservation and input Vendor, trip pricing, and trip dates

How to use Batched Reminders

Enhanced Res Card Skills Class Outline

After setup, you are ready to hold a staff meeting. Photocopy, pass out *Agent Handouts,* and teach Enhanced Res Cards Skills:

In-House Trainer Review: What is a Res Card and how does using Res Cards benefit agents?
 (3 minutes)

- o Manages sale from start to finish
- o Easily create Reminders all at once for all the things you need to track
- o Provides valuable trip details in one place
- o Management and owners can get valuable reports on trips
- o You can copy a Res Card from one Profile to another o Res Cards enable you to use Live Connect Providers
- o Saves time by typing details into Res Cards instead of writing them on paper and transferring them
- o Invoices from Res Cards fall directly into *Trams Back Office*

In-House Trainer Demonstration: How to retrieve previous created Res Cards. **(3 minutes)**
- o From inside a Reminder
- o From Profile's Res Card Tab

In-House Trainer Demonstration: General Info Res Card Section (3 minutes)
- o Change *Reservation Cycle* from *Under Consideration* to *Booked.*
- o Show how to *Go to Profile* and use Windows to hop back into Res Card
- o Explain Bill to and Ship To Addresses, Regions, Destination, Group
- o **A**dd travelers – Insert from Profile, and add other travelers

In-House Trainer Demonstration – Create a new reservation and input vendor, trip pricing, and trip dates. **(3 minutes)**

In-House Trainer Demonstration - Click Batched Reminders to set up all reminders at one time for the trip. Show how to apply and check in Activity Tab for all reminders created. (**3 minutes)**

Q & A Session (Cap at 8 minutes)

In-House Trainer Hands On: Have agents practice new skills by creating new Res Cards (see Agent Handouts) **(8 minutes or practice on own)**

In-House Trainer Sets Expectations (for Agent accountability): Agents are to setup a Res card for each new trip and create a reminder for *Trip Inquiry Follow-up.* When client books trip, agent will query up the res card, fill in key Res Card information such as travelers, vendor, trip pricing and dates, and created batched reminders for Deposit, Final Payment, Check for Documents, and Welcome Home call. **(3 minutes)**

**Disorganized?
Over worked?
Wasting time looking for files, phone
numbers and information?**

ClientBase Can Help

Manage the Trip Planning Process with Res Cards

As your agency implements *ClientBase* and begins reaping the rewards of improved customer relationships and effective marketing programs, your leisure travel sales should start increasing. To help you better manage this increasing volume of business and track the leads generated by your marketing programs, the *Res Card* has been created. Think of the *ClientBase* Res Card as a home for the many details involved in planning each and every trip for your customers and as a tool that will help you manage the entire trip planning process.

Regardless of the technology your agents use or don't use, regardless of your niche or type of business, regardless of how long your agents have been in the business, there are certain fundamental components involved in the *trip planning process.* The *ClientBase* Res Card has been designed to help agents through each process with the objective of making agents more efficient and effective. In the past, agents may have concentrated more of their attention on just the Booking Process, but with the advent of airline commission caps, there has been a new emphasis on leisure bookings and a greater need to manage these leisure sales.

The Res Card feature in *ClientBase* provides a perfect tool to integrate all processes in trip planning. By setting up a Res Card, an agent can document the client's first call by creating a *Res Card* and scheduling a follow-up call (listed on the daily to-do list) with a *Reminder.* Once the customer is considering the trip, the agent can capture details of reservations and print out client quotes or itineraries. By using the Live Connect feature in *ClientBase*, agents have the ability to book reservations via on-line booking engines and then pull all that reservation detail back into the Res Card.

When the client books the trip, the agent can produce invoices and trip statements, while tracking invoiced and un-invoiced balances. Additional notes and reminders can be created to remind an agent of a final payment date or a document confirmation. When the customer returns home, the agent can document his remarks and suggestions. Because all client trip data is in one localized area, reports such as Final Payment, Vendor Booking and Service Provider Activity can be produced for Res Cards in all stages of implementation of the trip planning process.

As *ClientBase* shares a database with *Trams Back Office*, the invoices generated from the Res Card automatically become part of the *Trams Back Office* data. Invoices generated through the Res Card maintain their own numbering system, separate from the numbering system of invoices generated through Interface.

Managing the Trip Planning Process
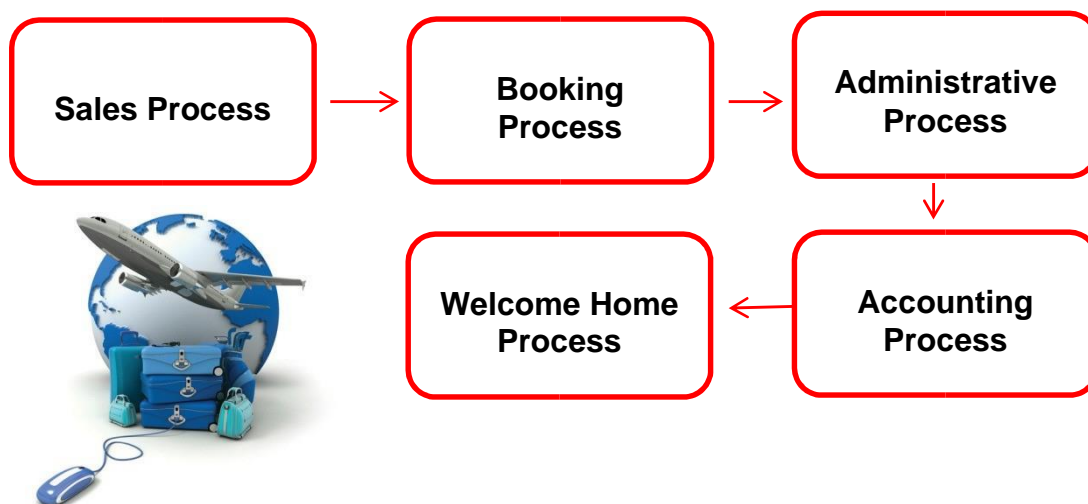
Cheat Sheet

Enhanced Res Card Skills

Steps for successfully entering Res Card Information:

1. **For every new trip inquiry, edit/create a new profile and then create a new Res Card and *Trip Inquiry Reminder* as learned in Packet 4.**

2. **When client books the trip and if a Res Card already exists for this customer, open it either through the Reminder, or in the Profile Res Card tab. Fill in Key Fields in Res Card:**
   - Res Card Cycle (change to *Booked)*
   - Group
   - Trip Name
   - Region/Destination
   - Passenger Name – Insert from Profile, and add other travelers

3. **Create new Reservation and input vendor, trip prices and trip dates.**

4. **Click Batched Reminders to automatically schedule deposit due, final payment, check documents, welcome home calls, etc.**

Let's Practice!

Exercise #1:
Use your own Agent profile to create a new Res Card, fill in the key fields, enter travelers, and create a reservation with vendor, trip pricing, and trip dates. Click batched reminders to create all pertinent reminders at the same time. Apply changes and in the Activity Tab, click *Refresh* to see your new reminders.

Exercise #2:
Use a real booking and enter basic data.

Exercise #3:
There's a new client on the phone interested in a Bermuda Cruise. Create a new Profile and a *Trip Inquiry Follow-up* reminder. Now you are calling him from your To-Do list in the Activity Manager. Enter the Res Card from the Reminder, change the *Res Cycle,* fill in all other suggested fields, and create a reservation with trip dates, vendor and pricing. Click batched reminders to create all pertinent reminders at the same time. Apply changes, and in the Activity Tab, click *Refresh* to see your new reminders.

Exercise #4: Role Play
Partner up with another agent in your office and practice creating a new Res Card in the partner's Agent profile. (Don't forget to ask client if this is correct address, phone number and e-mail.) Change the *Res Cycle* to *Booked,* and enter some travelers*.* Create a reservation with vendor, pricing, and trip dates. Click batched reminders to create all pertinent reminders at the same time. Apply changes, and in the Activity Tab, click *Refresh* to see your new reminders.

Reverse roles.

Monitor Enhanced Res Cards Skills
(Inspect what you expect!)

After you have taught agents Res Card skills, use reports to monitor their progress to review and discuss results as soon as possible:

In Level 1 Res Card Query, choose *Reservation Cycle* from drop-down menu, and select *Booked.* Check Res Card fields for accuracy.

- o   Were Travelers entered? Other fields you taught?
- o   Were vendor, trip pricing, and trip dates complete?
- o   Were Batched Reminders set up?

Query for all Active Res Cards:

- o   Using Level 1 Query choose *Status* from drop down menu and choose *Active,* and choose *Agent Name* and leave blank.
- o   Go to **Reports|Res Card Reports|Reservation Cycle Report** and sort by Agent to run report showing what res card cycle per Agent each Res Card is in (see back).

Publish User Stats daily for all to view (for agent accountability).

Review Res Card skills with those agents who need help.
Randomly select an agent to sit with and observe usage.

Agent	CreateDate	Region	Destination		Trip Name	
	Client Name	Reservation Total	Commission Total	Invoiced Total		Uninvoiced Total
Sharon Meyer	Jan 28,	United States	Florida		Florida	
	Hale/James	746.59	0.00	746.59		0.00
Sharon Meyer	Jun 06,		Europe/Russia		Crystal Cruise 2013	
	Barnes/Noble	7,000.00	980.00	0.00		7,000.00
Sharon Meyer	Oct 27,				Kona Getaway	
	Henke/Rich	897.60	81.60	100.00		797.60
Sharon Meyer	Sep 24,				Tauck Tours	
	Barnes/Brenda	550.00	0.00	0.00		550.00
Sharon Meyer	Jan 05,				Staff Meeting-1/20/06-9:00a	
	Staff Meetings	0.00	0.00	0.00		0.00
Sharon Meyer	Jan 27,				Amadeus Import	
	Jonker /Kennedy	0.00	0.00	0.00		0.00
Totals:		9,194.19	1,061.60	846.59		8,347.60

Enhanced Res Card Skills Additional Resources

Here is a list of additional resources available from *Trams* Products and Services to help you and your agents learn Enhanced Res Cards Skills:

For the In-House Trainer:

1. From *ClientBase* program, click **Help Files|Contents:**

    a. Click *An In-Depth Look at Res Cards.*

    b. Click *Set Up ClientBase for your Agents|Global Default Res Card Defaults|Batch Reminder Settings.*

    c. From Index, type *B*. Click *Batch Reminders.*

For the Agents:

1. From *ClientBase* program, click **Help Files|Contents:**

    a. Click *An In-Depth Look at Res Cards.*

Res Cards Skills Enhancement

As agents become more comfortable in entering Res Card information, you may want to teach them additional skills:

- **What are Service Providers? Differences between Service Providers and Vendors.**

- **Capture Reservation Details manually, using Live Connect, using PNR Import, or using Inventory.**

- **How to use Client Quote Proposals.**

- **How to generate an Invoice.**

- **Using Live Connect.**

- **Using Itemized Pricing.**

- **Use of Itin/Invoice Remarks.**