ClientBase Online QuickStart Training Program

We at Trams and ClientBase Products and Services feel strongly that the easiest and fastest way to get ClientBase Online up and running is to assign an In-House Trainer to implement the program. The enclosed 5-step all-inclusive training program is designed to help the In-House Trainer with training agents. It consists of 5 basic ClientBase Online concepts:

Packet One: **Learning Basic Profile Skills**

Packet Two: **Learning Merge to PNR**

Packet Three: **Updating Marketing Codes**

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

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 program.

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/Additional Resources –** This is probably the most important part of the training program. The only way to ensure your agents "get it" is to track results. Progress reports you can run in ClientBase Windows Version.

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

Packet One: Learning Basic Profile Skills

Overview

In many agencies' client information is stored in too many different locations. With ClientBase Online, 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 Online***
- **How to begin doing Simple Search**
- **Start a new profile**
- **Update existing profiles**
- **Complete key profile fields**
    - **First Name**
    - **Last Name**
    - **Courtesy Title**
    - **Primary Address**
    - **Primary Phones/Emails**
    - **Interface ID (If agency requires)**
    - **Salutation**
    - **Travelers (Names, Birthdays, Credit Cards, Loyalty Programs)**
    - **How to use Travel History to view past client travel**

Learning Basic Profile Skills Class Outline

After setup, you are ready to hold a staff meeting. (**Important! It is imperative agents watch the ClientBase Online *Overview* recording [here](link).**) Photocopy, pass out *Agent Handouts,* and teach Basic Profile
Skills.

Brief introduction from Owner or Manager: What is ClientBase Online 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 Online* benefit agents?   **(3 Minutes)**

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

In-House Trainer Discussion: How do I log into *ClientBase Online* 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 and update profile fields. Bonus: Click on Travel History to view what travel client has done in past! **(2 Minutes)**

In-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 Save/Cancel. (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 in ClientBase 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 Online Can Help

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.

Cheat Sheet
Agent Profile Basic Skills

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*.

4. Enter additional Traveler details if you know them. Click *Save*.

Profile Quick Entry Screen

[✓ SAVE] [◀ BACK] [CANCEL]

Primary Traveler			
Last Name	First Name	Middle Name	Courtesy Title
Bailey	George		▼

Primary Phone Number   Primary Phone Description

+ [1] ([586]) [   ]   [Home   ] ✖

Primary E-mail   Primary E-mail Description

[   ]   [E-mail   ] ✖

Gender   Citizenship

[▼]   [▼]

Birth Date

[▼]   [   ] , [   ]

Let's Practice!

Exercise #1:

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: Search 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, emails 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.

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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: These reports can be run in ClientBase Windows or ClientBase Online.

- **Search daily for previous day's newly updated profiles.**

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

  1. Go to **Reports > Profile Reports > Statistics > User Stats** to run a report showing profiles created and modified with a total number of updates by User.

  2. 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

SHARON

# of Profiles Created	
Agent	0
Corporate	0
Leisure	2
Other	0
Vendor	0
	2

# of Profiles Modified	
Agent	0
Corporate	0
Leisure	0
Other	0
Vendor	0
	0

Total # of Updates	2

Report: **Completed Field Statistics**
Agent: SYSDBA

Filter: *** General Info
Profile Modified Date Greater than or Equal to
Profile Status Is Equal to Active

	Query Results	Matches	% of Results
Primary Address Line 1	3	3	100.00%
Primary Address Line 2	3	0	0%
Primary Address City	3	3	100.00%
Primary Address State	3	3	100.00%
Primary Address Zip Code	3	3	100.00%
Primary Phone	3	3	100.00%
Primary Fax	3	0	0%
Primary E-mail	3	3	100.00%

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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 Online program, click the **Tools > Contents.**

    a. Read *Set Up to Use ClientBase Online*

    b. Read *An In-Depth Look at Client Profiles*

For the Agents:

1. From ClientBase Online program, click the **Tools > 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 Marketing information**

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 Online. 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 Online display or build a new profile and merge customer data to the PNR. o Start in ClientBase Online 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

You are ready to hold a staff meeting.

In-House Trainer Review: How to edit/create Profiles. (3 minutes)
Quick review of key applicable fields such as Bill To/Ship To addresses, communication entries, traveler names, credit cards, loyalty programs, etc.

In-House Trainer Intro: Why use Merge to PNR and how does this benefit the agency and agents? (2 minutes)

- Saves me time when I create a PNR for clients who don't have a GDS profile.

- Adds details to the PNR in much the same way as a GDS profile would.

- With every profile built, the agency's marketing database has been verified/updated. This is the key to successful marketing programs.

- All client details are merged in a uniform, standardized format, regardless of the agent.

- If the agency has multiple reservation systems, only one profile needs to be maintained and data is converted to the applicable GDS formats.

- More efficient for accounting (*Trams Back Office)* if PNR is started in *ClientBase Online* Version, as the back office Interface ID is automatically sent to PNR.

In-House Trainer Discussion: How do I toggle between open PNR and ClientBase Online? What are two methods to use *Merge to PNR*? (4 minutes)

- Start by checking availability in the GDS. Toggle into *ClientBase Online* Version and search for an existing profile. If found, verify data is current and accurate. If none found, create a new one. Merge to PNR.

- Search for an existing profile in *ClientBase Online* Version. If found, verify data is current and accurate. If none found, create a new one. Merge to PNR. Toggle back to GDS and check availability.

In-House Trainer Demonstration: Step-by-step how to *Merge to PNR*. (8 minutes)
Search for profile either prior to doing availability in GDS, or after.
Verify client data and that a Bill To/Ship To address exists.
Merge to PNR.
Review Selection Screen. Select and unselect as desired.
Review *PNR Preview Screen*, explaining how to make changes.
Finish and explain process of clipboard or API.

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

Q & A Session. (Cap 5 minutes)
In-House Trainer Sets Expectations: Expectation is that all PNRs will now be created from ClientBase Online Version. (**1 minute)**

Disorganized?

Over worked?

Wasting time looking for files, phone numbers and information?

ClientBase Online Can Help

Cheat Sheet
Merge to PNR

Save Time and Duplication with Merge to PNR

No more multiple entries or databases! ClientBase Online provides the ability to move customer information (maintained in the ClientBase Online 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: Patrick Young calls your agency to book some flights to Paris. You first locate Patrick's profile in your marketing database *(*ClientBase Online) 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!

Exercise #1: Start by checking availability in the GDS and toggle back into ClientBase Online 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 Online 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. Search 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 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:

For the In-House Trainer:

1. From ClientBase Online program, click the ***Tools > Contents.***

   a. Read *Putting Profiles to Work for You*, see Merge to PNR section

For the Agents:

1. From ClientBase Online program, click the ***Tools > Contents***.

   a. Read *Putting Profiles to Work for You*, see Merge to PNR section

Merge to PNR Skills Enhancement

As agents become more comfortable in entering using the Merge to PNR feature in ClientBase Online, 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 client's travel preferences is simple when a checklist of marketing codes is available to select from. The Marketing Codes in the ClientBase Online 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 agent to master the following skills:

- **To update client profiles with Marketing Codes which reflect travel interests**

- **Profile Marketing Link**
  Add/delete codes by clicking Edit

- **Using Marketing Codes to qualify 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 Online* benefit agents? (2 minutes)

- Agency can perform target marketing to get right product to the right customers
- Helps agents to qualify clients
- Agents can do target marketing to their own clients
- Agents can be pro-active with their own client lists to stimulate travel

In-House Trainer Discussion: Review the Marketing Link screen. (5 minutes)

- Click *Edit* to add/delete codes (explaining life cycle of a client an how these codes change)

In-House Trainer Discussion: Review of Marketing Categories and Codes. (5 minutes)

- Review and define any codes that might be open to interpretation
- Ask for suggestions from agents on what codes they feel are missing

In-House Trainer Discussion: Populating Marketing Link by talking with Client: (8 minutes)

- During sales process
- During Welcome Home call
- Listen during a conversation with a client, take notes, update profile

Q & A Session (Cap at 8 minutes)

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 Link. **(2 minutes)**

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

ClientBase Online Can Help

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!

Cheat Sheet
Updating Marketing Codes

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.

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 Online program, click the **Tools > Contents**.

    a. Read *In-Depth Look at Client Profiles|Anatomy of a Profile|Marketing Codes Link* section.

For the Agents:

1. From ClientBase Online program, click the **Tools > Contents**.

    a. Read *In-Depth Look at Client Profiles|Anatomy of a Profile|Marketing Codes Link* section.

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 Online *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   *Save* to save Res Card

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

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 set up in C*lientBase Windows* Version, you are ready to hold a staff meeting.

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

- Helps me organize my daily routine.

- Helps me manage the sales process: I'll get alerted when it's time to follow-up on that sales inquiry.

- 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.

- All details about a particular trip are kept 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 *Status* "Active" defaults

o Select *Reservation Cycle* "Under Consideration"

o Give trip a name

o Identify region

o *S*ave Res Card

In-House Trainer Demonstration - How to create a Reminder for trip follow-up: (6 minutes)

- Set a follow-up date

- Explain dated and timed activity vs. to-do timeless

- Review screen details

- Select *Trip Inquiry Follow-up* as subject from drop

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

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

Q & A Session (Cap at 5 minutes)

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

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

ClientBase Online Can Help

Strengthen Client Relationship with the Advisor Dashboard

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 the Advisor Dashboard in ClientBase Online. From this area, she tracks and completes all of the customer marketing tasks that keep her valued clients loyal. *ClientBase* 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 *Dashboard* manager. By default, ClientBase Online displays a list of all of Dianne's final payments and agent open 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.

Cheat Sheet

Getting Started with Res Cards & Reminders

Steps for successfully implementing basic Reminder & Res Card skills:

1. **When a customer inquiries 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.**

   o *Agent Name* required

   o Status *Active* defaults

   o Select *Reservation Cycle,* "Under Consideration" or "Quote"

   o Give trip a name & identify *Region* and *Destination*

   o *Apply* to save Res Card

2. **Click the Activity Link 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 Save Res Card

3. **Every day open the Dashboard and your *New Trip Inquiry Follow-ups* appear in the Agent Reminders tab. A list of the Res Cards appears in the *Quoted (Proposals)* tab under the Travel section of the dashboard.**

4. **Close a Reminder by either rescheduling it (if appropriate) or clicking on it and selecting the *Complete Reminders* icon.**

Merge Options ▼

Create New: **PNR** **Res Card** **Live Connect** **Note** **Mailer** **Reminder**

Leisure - Young/Patrick

Res Cards ✕

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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

Remarks: Top 50 Client; Nickname: 'Pat', Related to Vicki Allison

About Young/Patrick

General Info
Communications
Remarks
M
T
A

Res Cards - Summary Switch to Detail View

PASTE   -- Create Res Card -- ⌄

Filters

All Res Cards   Active   Departed   Cancelled

te   **Region**   **Trip Sourc**
Europe   Internet
Europe   Internet

SAVE   **CANCEL**

Res Card

Agent

Beth Vollmar   [--- Select Agent ---] ⌄

Create Date

9/8/17 📅

Branch

[0]Jet Set Travel

Status

Active ⌄

Reservation Cycle

Lead   -Reservatio

Marketing Source

E-Blast   -Marketing

Group

          -Group Sel-

Region

Bermuda & Caribbean   -Region Sel

Destination

Caribbean - Eastern   🔍 DESTI

Prepared for

[17392769] Young/Patrick   ...

Trip Name   ocator

Anniversary Cruise   ✕

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   ✏ EDIT

Create date: 9/8/17
Agent: Beth Vollmar
Status: Active
Reservation Cycle: Lead
Marketing Source: E-Blast
Group:
Branch No.: [0] Jet Set Travel

Prepared for: [17392769] Young/...
Trip Name: Anniversary Cruise
Locator No.:
Region: Bermuda & Caribbean
Destination: Caribbean - Eastern
Trip Start Date:
Trip End Date:

Client Ship to Address:
Patrick Young
2498 Poe Road
Seattle, WA 43402

Client Bill to Address:
Patrick Young
2498 Poe Road
Seattle, WA 43402

Create Reminder

SAVE   **CANCEL**

Reminder General Info

Date of Reminder

09/08/2017 📅

☐ To Do (Timeless)

Start Time

01:15 PM   -Time Sel- ⌄

Duration

5 minutes   -Duration Sel- ⌄

Login Name

BETH   -Login Sel- ⌄

Profile

[17392769] Young/Patrick   ...

Res Card

[17910515] Anniversary Cruise   ...

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- ⌄

Subject

Trip Inquiry Follow-Up   ubject Sel- ⌄

Priority

Medium ⌄   ☐ Private

Let's Practice!

Exercise #1:

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 Alarm.

Getting Started with Res Cards and Reminders 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 Online program, click the *Tools > Contents*.

    a. Read *In-Depth Look at Activities*

For the Agents:

1. From ClientBase Online program, click the *Tools > Contents*.

    a. Read *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**

Packet Five
Enhanced Res Card Skills

Overview

Now that your agents have been introduced to the ClientBase Online. 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   Traveler Name – Insert from Profile, or link 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 set up in *ClientBase*, you are ready to hold a staff meeting.

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

- Manages sale from start to finish

- Easily create Reminders all at once for all the things you need to track

- Provides valuable trip details in one place

- Management and owners can get valuable reports on trips

- Res Cards enable you to use Live Connect Providers

- Saves time by typing details into Res Cards instead of writing them on paper and transferring them

- Invoices from Res Cards fall directly into Trams Back Office

In-House Trainer Demonstration: How to retrieve previous created Res Cards. **(3 minutes)**

- From Profile's Res Card Link

- From Res Card Manager

In-House Trainer Demonstration: General Info Res Card Section (3 minutes)

- Change *Reservation Cycle* from *Under Consideration* to *Booked.*

- Show *Page History* to go to Profile and to hop back into Res Card

- Explain Bill to and Ship To Addresses, Regions, Group

- Add Travelers – Insert from Profile, and link 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 Reminders to set up all reminders for the trip. Show how to save and check in Activity Tab for all reminders created. (**3 minutes**)

Q & A Session (Cap at 5 minutes)

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 search for the Res Card, fill in key Res Card information such as travelers, vendor, trip pricing and dates, and created reminders for Deposit, Final Payment, and Check for Documents, and Welcome Home call. **(3 minutes)**

Disorganized?

Over worked?

Wasting time looking for files, phone numbers and information?
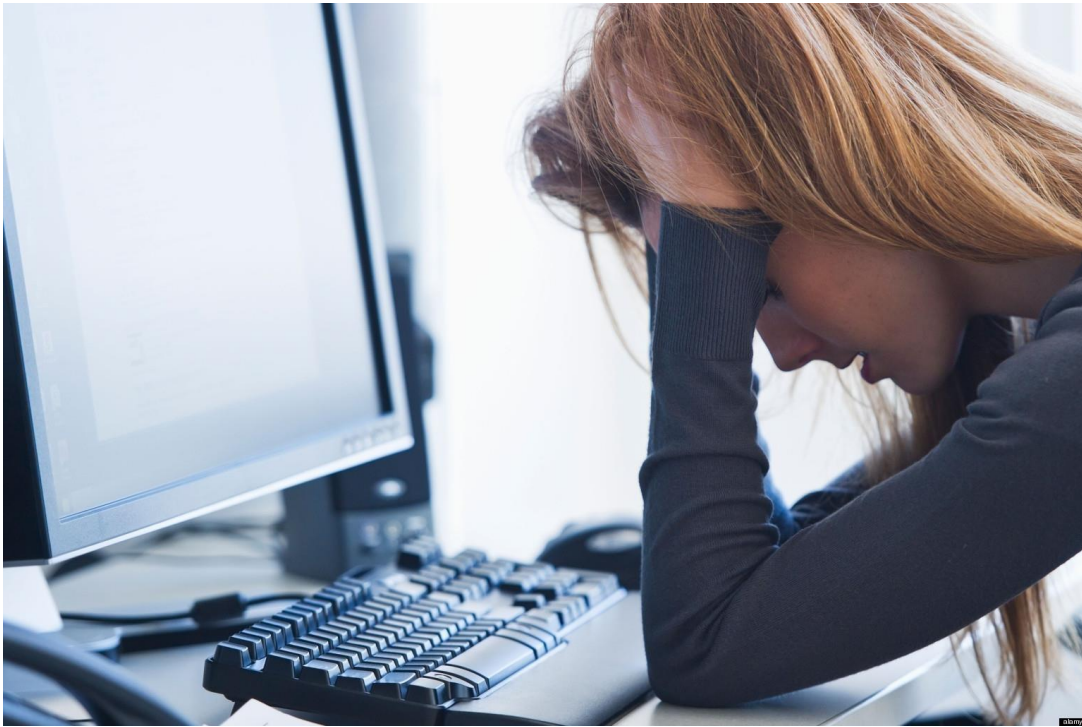
ClientBase Online Can Help

Manage the Trip Planning Process with Res Cards

As your agency implements ClientBase Online 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 Online 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 Online 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

04/21
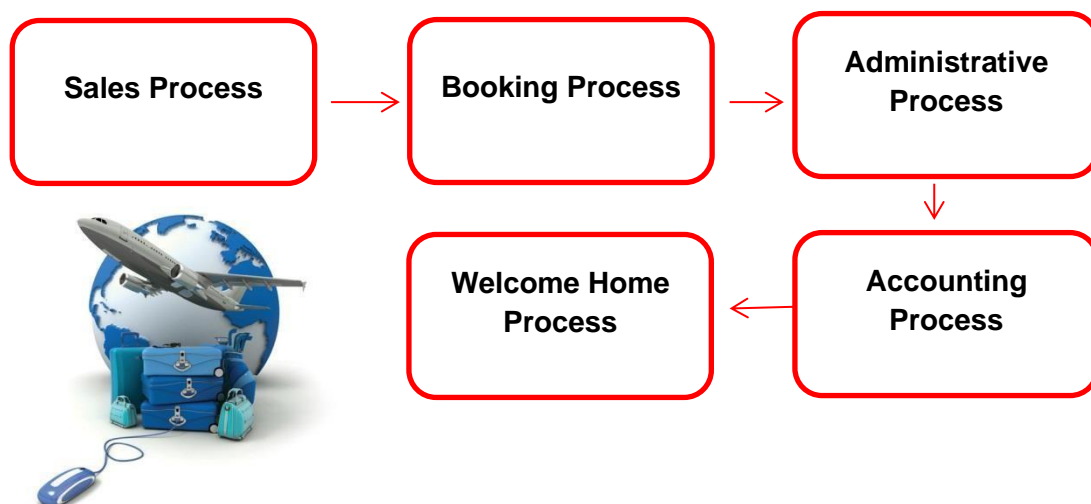
Cheat Sheet

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.**

    o Res Card Cycle (change to *Booked)*

    o Group

    o Trip Name

    o Region/Destination

    o Passenger Name – Insert from Profile, and add other travelers

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.**

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.**

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 Online program, click *Tools > 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 Online program, click *Tools > Contents.*

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