Gathering Information for an Accurate Proposal

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Creating an accurate travel proposal starts with gathering the right information—thoroughly and efficiently. As a travel advisor, your job is to match clients with the perfect vacation experiences, and that begins by understanding their preferences, priorities, and logistical details. The *Prospect Questionnaire* is your tool in this process.

Below is a guide to using the questionnaire effectively, along with tips for how to get the most comprehensive and helpful responses from your prospects.

1. Start with the Basics
The first section of the Prospect Questionnaire collects essential details:

- **Lead Guest Contact Information**: Always double-check that you have the correct spelling of names, birthdates, email address, and phone number. These are needed for both communication and travel booking.
- **Traveler Details**: Each traveler's full name, age, and birthdate are important for ticketing, accommodations, and qualifying for child or senior discounts. Ask if any traveler has accessibility needs or special considerations (e.g., allergies, mobility aids).

2. Establish Travel Dates and Flexibility
Understanding travel dates is key to pricing and availability:

- **Arrival & Departure Dates**: Be as specific as possible.
- **Date Flexibility**: If they're flexible, ask how much wiggle room they have—1 day, 3 days, a week? This can be helpful in finding better pricing or promotions.

Tip: If they're tied to school breaks or work schedules, request those details in writing so you can avoid suggesting dates that won't work.

3. Clarify General Travel Needs
This section gives insight into the traveler's goals and how far along they are in the decision-making process:

- **Celebrations**: Birthdays, anniversaries, honeymoons, graduations, etc., may qualify them for special perks or upgrades.
- **Flight Needs**: If they need flights, collect their home or preferred departure airport. Let them know about the $25 per person air booking fee.
- **Memberships & Discounts**: These affiliations (Disney Visa, military, FL/CA residency, etc.) can impact pricing or provide special offers.

Tip: Many clients don't realize they qualify for discounts. Ask guiding questions: "Do you or your spouse have a military ID?" or "Do you subscribe to Disney+?"

4. Understand Where They Are in the Planning Process
This determines how you frame the proposal:

- **Ready to Book**: Provide detailed quotes with a call to action.
- **Early Planning**: Educate and provide sample itineraries.
- **Browsing**: Keep things light but informative; this might be a long-term lead.

Tip: For those in the early stages, consider offering a 15-minute discovery call to build rapport.

5. Destination-Specific Sample Questions
Now dig into what kind of vacation they're envisioning. Tailor your questions based on the type of trip:

Disney Destinations
- What resort tier are they considering—Value, Moderate, Deluxe, or Deluxe Villa?
- Are they interested in a Disney Dining Plan? If so, which one?

Follow-up Questions:
- Are they open to park hopper tickets?
- Would they like help with Genie+ or Lightning Lane strategy?

Cruises
- Preferred cruise line or destination?
- Cabin preference (interior, oceanview, balcony, suite)?
- Desired length of cruise?

Follow-up Questions:
- Any past cruising experience?
- Do they want excursions arranged?

All-Inclusive Resorts
- Do they prefer Mexico, the Caribbean, or both?
- What amenities matter most—beach access, swim-up bar, kids' club, spa, gourmet dining?

Follow-up Questions:
- Adults-only or family-friendly?
- Interested in a specific resort brand (e.g., Sandals, Dreams, Secrets)?

Guided Travel
- Which destination are they interested in?
- Would they prefer a small-group tour or a more traditional group experience?

Follow-up Questions:
- Are they looking for a luxury or more budget-friendly experience?
- Any mobility or pace considerations?

6. What to Do With the Information
Once you've gathered all the information:
1. **Confirm Details**: Summarize what you've learned in a follow-up message to the client to confirm accuracy.
2. **Create the Proposal**: Include pricing, package components, and clear value statements based on their interests and goals.
3. **Include Enhancements**: Suggest travel insurance, transfers, pre- and post-stays, and dining or spa reservations that align with their preferences.
4. **Set Expectations**: Let them know when to expect the full proposal and how to move forward if they're ready to book.

Final Tips for Success

- Always ask **open-ended questions** when possible.
- Don’t rely only on written responses—use the questionnaire as a springboard for a short discovery call or video chat.
- Use your CRM or client management system to log every detail for future reference.
- Remember, the more thoughtful your initial proposal, the more confidence the client will have in booking with you.

By mastering how to use the Prospect Questionnaire and enhancing it with personal interaction, you’ll create accurate, customized proposals that lead to bookings—and loyal clients.