Computer Programs You Will Need as a Travel Advisor

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As a new travel advisor, your success will be tied to how efficiently you manage your workflow, stay organized, and communicate with clients. The right software tools can save you time, enhance productivity, and provide professional service. In this guide, we'll break down the key computer programs you should have in your toolkit, separating them into required and suggested categories.

Required Computer Programs

1. ***Microsoft Office or Google Workspace***
Whether you are creating client itineraries, drafting correspondence, or preparing marketing materials, you'll need software for document creation and spreadsheets. The two primary choices are:

- **Microsoft Office Suite:** Includes Word, Excel, and PowerPoint. Word is useful for drafting contracts, itineraries, and travel proposals. Excel can help manage budgets and client data, and PowerPoint is helpful for creating presentations.
- **Google Workspace (formerly G Suite):** This cloud-based alternative to Microsoft Office offers Google Docs, Sheets, and Slides. The real-time collaboration features make it ideal for working with colleagues or clients remotely.

Why it's essential: Both options are widely used across industries and will form the backbone of your document management system. Excel (or Sheets) can also be invaluable for organizing client information, tracking expenses, and managing commissions.

2. ***Email and Calendar Management***
An efficient email system is crucial for client communication and organizing appointments.

- **Outlook (Microsoft) or Gmail (Google):** These email platforms also integrate calendars, making it easier to track meetings, deadlines, and follow-ups.
- **Microsoft Outlook** or **Google Calendar:** Both help keep you organized with appointments, reminders, and travel booking deadlines.
- **Calendly:** Calendly is a scheduling tool that simplifies the process of booking meetings by allowing clients to schedule a meeting with you. It integrates with various calendar systems, making it easy to manage appointments without the back-and-forth emails.

Why it's essential: You'll be managing numerous communications and appointments, so staying organized is crucial.

3. ***Cloud Storage and File Management***
Keeping all your documents, contracts, and client information organized and accessible is vital.

- **Google Drive, Microsoft OneDrive, or Dropbox:** These platforms let you store and share documents with colleagues or clients and ensure you have access to files wherever you go.

Why it's essential: Cloud storage keeps everything backed up and easily shareable, which is crucial for handling travel documents and client information. It also allows your travel business to be portable.

4. ***PDF Software***
Sending and receiving contracts, itineraries, and travel documents is a daily task for travel advisors.

- **Adobe Acrobat Reader** (for viewing) or **Adobe Acrobat Pro** (for editing and creating PDFs): You'll need to be able to read and sometimes edit PDF files that contain travel information.
- **Cute PDF or MicroSoft Print to PDF are programs which allow you to print documents into a PDF format.**

Why it's essential: Travel suppliers often send documents in PDF format, and you'll need to be able to manipulate these as part of your daily work. Conversely, you might need to send PDFs to clients and vendors.

Suggested Computer Programs

1. ***Graphic Design Programs***
These tools will help you create marketing materials, social media posts, or even branded itineraries to share with clients. Even if you aren't a designer, these programs offer templates and user-friendly interfaces.

- **Canva:** An intuitive design tool that offers templates for social media, flyers, business cards, and more. It's particularly useful for creating visually appealing client-facing materials like itineraries and proposals.
- **PicMonkey:** Similar to Canva, PicMonkey allows you to design marketing materials and edit photos.
- **Adobe Express:** Offers more advanced features for advisors looking to create polished designs but still beginner-friendly compared to Photoshop.
- **Adobe Photoshop:** For those who have advanced design needs or want to create highly customized graphics.

Why it's useful: Travel advisors often need to market their services through social media, email campaigns, and print materials. These programs make creating professional-looking materials easy.

2. ***Online Meeting Programs***
Conducting virtual meetings with clients, agency partners or supplier training will become a routine part of your workflow, especially for remote consultations or presentations.

- **Zoom, Microsoft Teams, or Skype:** These are popular online meeting platforms that allow you to conduct video conferences, screen sharing, and client presentations.
- **Google Meet:** Another great alternative that integrates easily with Gmail and Google Calendar.

Why it's useful: Video meetings allow you to build trust and rapport with clients, especially when face-to-face meetings aren't possible.

3. ***Travel Itinerary Builders***
As a travel advisor, organizing trips for clients will be one of your primary tasks. These itinerary-building platforms allow you to create professional, branded travel documents that include flight details, hotel bookings, and activities.

- **Travefy:** This platform allows you to create and share itineraries with clients that are visually appealing and easy to follow.
- **Tern:** Another user-friendly option for creating itineraries that include maps, activities, and travel details.
- Axus: This platform is free to Wanderly Adventures advisors who have signed up for Signature Travel Network.

Why it's useful: Professionally presented travel itineraries not only add value to your service but also provide clients with organized information they can easily access.

5. ***Accounting and Invoicing Software***
Keeping track of finances, payments, and commissions is essential for any travel advisor.

- **QuickBooks or FreshBooks:** These programs allow you to track income, expenses, and manage invoices, making it easy to keep your books balanced.
- **Expensify:** A cloud-based accounting program that a software platform that helps users manage their expenses and finances.

Why it's useful: Keeping accurate financial records is crucial for managing your travel business's profitability.

6. ***Social Media Management Tools***
A strong social media presence is a must for travel advisors looking to attract new clients and engage current ones.

- **Facebook MetaSuite for Business, Hootsuite, Buffer, or Later:** These tools allow you to schedule posts, monitor engagement, and track performance across different social media platforms.

Why it's useful: A social media management tool helps you plan and organize your posts in advance, freeing up time for client-focused work.

7. ***Video Recording Program***
Video recording programs are an incredibly valuable tool for travel advisors, offering a dynamic way to enhance client interactions and streamline communication. With video recording programs, advisors can create personalized video messages and virtual tours, providing clients with immersive glimpses of destinations and detailed walkthroughs of travel itineraries. Additionally, they allow advisors to record and share important information of proposals and even explain your decision making on selecting different components of a quote. By leveraging a video recording program, travel advisors can deliver exceptional service, build stronger client relationships, and stand out in a competitive market.

- Loom: This is the industry leader in video recording. It allows you to record your voice as you are sharing your screen which you can then send to your client as a link.

Customer Relationship Management System (CRM)

TPI Suitcase is a **required** program at Wanderly Adventures. There is no cost for this program. It offers basic quote tracking and task management.

There are many other more robust travel CRMs on the market. If you chose to use one of these, they will be at your own expense. Here are some industry leading travel CRMs:

- **Vacation Creations:** Helps you manage your client relationships, track leads, track commissions and ensure that all client information is up-to-date. A good CRM also allows you to track booking details and follow-ups.
- **Vacation CRM:** Designed specifically for travel advisors, this CRM allows you to manage bookings, client information, and communications all in one place.
- **TESS (Travel eSolutions Software):** This CRM system offers additional features such as invoicing and supplier integrations, helping travel advisors manage the administrative side of their business.
- **Travel Joy: This all-in-one platform offers travel advisors to manage clients, itineraries and payments.**
- **Travefy: This is an itinerary builder and CRM in one.**
- **Trello**: Trello is a project management program that is easily converted to a CRM.

Why it's useful: A CRM allows you to streamline communication and ensures no client request falls through the cracks, while also helping you maintain detailed records of each client's travel preferences.

Conclusion
Equipping yourself with the right software is essential for running a successful travel agency. By combining essential tools such as Microsoft Office, email management, and PDF software with suggested programs for design, client management, and itinerary

building, you'll streamline your workflow and improve the overall client experience. As you gain experience, you'll discover which tools work best for your business, but starting with these will ensure you have a solid foundation.