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One of the biggest misconceptions among new travel advisors is that their primary responsibility is booking vacations. While creating memorable travel experiences is certainly the fun part of the job, one of your most important responsibilities happens behind the scenes: documentation.

Professional documentation protects your clients, your agency, your supplier relationships, and ultimately your livelihood.

In today's travel industry, nearly every booking involves contracts, supplier policies, cancellation terms, payment schedules, travel requirements, and legal disclosures. Memories fade, conversations are misunderstood, and emails get buried. Proper documentation creates a clear record of what was discussed, what decisions were made, and who approved them.

Experienced advisors often say: *"If it isn't documented, it didn't happen."*

That phrase may sound dramatic, but it reflects reality. A well-documented client file can resolve misunderstandings in minutes. A poorly documented file can result in lost commissions, chargebacks, complaints, or even legal disputes.

Why Documentation Matters
Documentation serves several important purposes.

It Protects Your Client
Clients rely on you for accurate information. Recording conversations ensures important details are not forgotten.

Examples include:
- Passport expiration dates
- Dietary restrictions
- Mobility concerns
- Cabin preferences
- Special celebrations
- Payment deadlines

When these items are documented, you're far less likely to overlook something important that could affect their trip.

It Protects You
Clients occasionally forget conversations.
For example:
"I never said I didn't want travel insurance."
"I thought we were flying nonstop."
"I didn't know passports had to be valid for six months."

Without documentation, these situations become one person's memory against another's. With documentation, you can provide the exact email, signed waiver, or CRM note showing what was discussed and when.

Professional documentation demonstrates that you fulfilled your duty as a travel advisor.

It Protects the Agency
Every advisor represents the agency's reputation.

Consistent documentation creates standardized records that another advisor or manager can access if needed.

If you're unavailable due to illness or vacation, another team member should be able to open the client's file and immediately understand:

- What has been booked
- What is still pending
- What conversations have taken place
- What promises have been made

Good documentation allows seamless service.

What Should Always Be Documented?
Every client file should tell the complete story of the booking.

At a minimum, document the following:

- Legal names exactly as shown on passports or identification
- Date of birth
- Phone numbers
- Email addresses
- Emergency contact
- Passport information (if appropriate)
- Known Traveler Number or TSA PreCheck information (if applicable)

Always verify spelling before making reservations. One incorrect letter can become an expensive problem.

Client Preferences
Understanding preferences improves future service.

Examples include:

- Preferred airlines
- Favorite hotel brands
- Bedding requests
- Dietary needs
- Mobility requirements
- Cabin location preferences
- Seating preferences
- Celebration information

These notes create a more personalized experience for repeat clients.

Travel Insurance Discussions
This is one of the most critical areas of documentation. Every client should be offered travel protection. Whether they accept or decline, document the conversation.

Include:

- Date insurance was offered
- Coverage discussed
- Client's decision
- Any signed waiver required by the agency

Never assume a verbal conversation is enough.
Written confirmation is your best protection.

To make sure your client's travel insurance decision is documented with ease, use the Tern Insurance feature. It not only documents the sale of the insurance, it documents when a client waives coverage.

Quote Approvals
Before confirming reservations, ensure the client has approved:

- Resort
- Room category
- Cabin category
- Flight selections
- Travel dates
- Total price
- Included amenities

By putting all of this information in Tern you get an easy confirmation to start the booking process.

Payment Authorizations
Document every payment.

Include:

- Date
- Amount
- Supplier
- Final payment due date
- Authorization received

Never process payments without proper authorization. This is another item easier taken care of in the Tern CRM where the client can provide their credit card authorization.

Documenting Your Bookings
Booking a client's vacation doesn't end when you click the "Confirm" button on the supplier portal. One of the most important responsibilities after every booking is ensuring that the reservation has been properly documented and recorded in all required systems.

At Wanderly Adventures, every booking should exist in the Tern CRM:

1. Disney Destinations bookings will stay only in the Tern CRM
2. All other suppliers will be migrated to TPI's Suitcase

The TPI Suitcase sync is mentioned in other modules so we won't discuss that here.

Keep Booking Records
Even though Tern and TPI maintain booking records, every professional advisor should keep:

- the reservation confirmation email
- the email verifying that the booking was successfully synced to TPI (for non-Disney suppliers)

Supplier Changes
Suppliers occasionally make changes.

Examples include:

- Flight schedule changes

- Hotel renovations
- Itinerary updates
- Port substitutions
- Dining policy changes

Document:
- When you learned of the change
- When you informed the client
- How the client responded

Cancellation Requests
If a client cancels record:
- Date requested
- Reason
- Supplier penalties
- Refund amount
- Remaining future credits
- Confirmation number

Always confirm cancellations in writing.

Best Practices for Documentation
Document Immediately
Don't rely on memory. Record conversations immediately after phone calls or meetings. Even five minutes later, important details may be forgotten.

Be Objective
Documentation should record facts—not opinions.

Instead of writing:
"The client was rude."

Write:
"Client expressed concern regarding cancellation penalties and requested additional explanation."

Professional notes should remain factual and respectful.

Use Complete Sentences
Avoid notes that only make sense to you.

Instead of:
"Kid—Allergies."

Write:
"Client says their 10-year-old son, Jack, has a severe peanut allergy."

Future you—and your teammates—will appreciate the clarity.

Keep Everything Together
Whenever possible, maintain documentation in one centralized CRM.

Avoid spreading information across:

- Sticky notes
- Text messages
- Personal notebooks
- Multiple email folders

Using the Tern CRM creates consistency and improves efficiency.

Save Important Emails
Do not delete client emails. They often become your strongest documentation. Many agencies maintain email records using standard retention policies.

Common Documentation Mistakes

- Waiting Until Later - After several client conversations, details begin blending together. Document immediately.
- Assuming You'll Remember - You won't. Professional advisors trust systems—not memory.
- Recording Too Little - A single sentence may not explain the entire situation. Include enough detail that another advisor could understand exactly what occurred.
- Recording Personal Opinions - Client files should remain professional. Focus on facts, timelines, and decisions.
- Forgetting Verbal Conversations - Phone calls should always be summarized in your CRM. After important calls, consider sending a follow-up email: "Thank you for speaking with me today. As discussed..." This creates another written record.

Real-World Example
Imagine this situation.

A client declines travel insurance. Eight months later, a medical emergency forces them to cancel. The cruise line imposes a $4,000 cancellation penalty. The client insists: "You never offered insurance."

Scenario One:
- You have no documentation.
- The situation becomes difficult to defend.

Scenario Two:
Your CRM contains:
- Date insurance was offered
- Insurance brochure emailed
- Client replied, "No thank you."
- Signed insurance waiver uploaded

The issue is resolved quickly because your documentation tells the complete story.

Key Takeaways
Excellent documentation is not busywork. It is one of the defining characteristics of a professional travel advisor because strong documentation:
- Protects your clients.
- Protects your commissions.
- Protects your agency.
- Improves customer service.
- Reduces misunderstandings.

- Creates consistency across your business.

The most successful advisors develop documentation habits early in their careers.

- Every phone call.
- Every quote.
- Every payment.
- Every approval.
- Every change.
- Every cancellation.
- When in doubt, document it.

Because in the travel industry, your records often become your strongest advocate.

Module Summary

Documentation is an investment in professionalism. It ensures that every booking is supported by a clear, accurate history of client decisions and advisor actions. By making thorough documentation part of your daily workflow, you'll reduce errors, strengthen client trust, and protect yourself from unnecessary disputes. Great advisors aren't just organized—they're prepared. Every note you take today may save hours of stress tomorrow, making documentation one of the most valuable habits you can develop throughout your career.