Wanderly Adventures

Quarterly Travel Advisor Business Tune-Up

Purpose: Review your business, strengthen client relationships, improve your sales process, and establish priorities for the next quarter.

Complete this review every three months. Use the results to create an actionable plan for the next 90 days.

SECTION 1: CRM AND SALES PIPELINE

1. Clean Up Tern

- Close dead deals and outdated opportunities.
- Update the stages of all active opportunities.
- Review your pipeline and ensure every opportunity has a clear next step.
- Review, update, and clean up client contacts.
- Add missing client details, preferences, birthdays, anniversaries, and travel interests where appropriate.

2. Revisit Every Stalled Opportunity

- Review quotes, proposals, and vacation inquiries that have not moved forward.
- Follow up with clients who have not responded.
- Reach out to clients who postponed or canceled their travel plans.

3. Review Your Discovery Questions

- Evaluate the questions you ask during initial consultations.
- Make sure you understand clients' priorities, travel styles, and expectations.
- Review how you uncover the motivation behind each trip.
- Identify at least one question you can add or improve.

4. Analyze Your Booking Conversion Rate

- Review how many qualified inquiries turn into bookings, if tracked.
- Look for patterns by lead source, travel product, or consultation process.
- Determine whether you need more inquiries, stronger follow-up, or better qualification.
- Identify one improvement to test next quarter.

SECTION 2: CLIENT RELATIONSHIPS AND RETENTION

5. Reconnect With Past Clients

- Reach out to clients who have not traveled with you recently.
- Check in with clients who may be ready to plan their next vacation.
- Send personalized messages based on previous trips or interests.
- Identify upcoming birthdays, anniversaries, family milestones, and other occasions that could inspire future travel.

6. Build a Repeat-Booking Strategy

- Identify clients likely to travel again within the next 12 to 24 months.
- Create follow-up reminders in Tern.
- Identify clients who might enjoy a different destination or travel style.
- Schedule proactive outreach around relevant booking windows.

7. Ask for Client Feedback

- Request feedback from at least three recent clients.
- Ask what they appreciated most about working with you.

- Ask what could have made their experience even better.
- Use feedback to improve your service and identify potential testimonials or reviews, with permission.

8. Strengthen Your Online Reputation
- Review recent Google and other relevant reviews.
- Invite satisfied clients to share honest feedback.
- Respond to reviews professionally where appropriate.
- Review your website biography, contact information, and advisor profile for accuracy.

SECTION 3: PROSPECTING AND BUSINESS DEVELOPMENT

9. Block Time for Prospecting
- Schedule dedicated prospecting time on your calendar.
- Protect that time from routine administrative tasks.
- Identify specific activities to complete during each session.
- Track your progress and results.

10. Create a Weekly Prospecting Routine
- Establish a repeatable weekly schedule for generating new business.
- Choose activities such as networking, referral outreach, social media engagement, and following up with leads.
- Set a realistic weekly activity target.
- Review your progress at the end of each week.

11. Strengthen Your Referral Network
- Identify potential referral partners in your community.
- Reconnect with local businesses, community organizations, and professional contacts.
- Attend or schedule a networking opportunity.
- Identify current or past clients who can be potential referrers

12. Review Your Ideal Client and Specialization
- Review which types of travelers and trips you enjoy serving most.
- Identify which client segments and travel products generate the strongest results.
- Determine whether your marketing reflects the clients you want to attract.
- Choose one area of expertise to deepen or promote.

SECTION 4: MARKETING AND PROFESSIONAL PRESENCE

13. Refresh Your LinkedIn Profile
- Review your professional headline, biography, photo, and contact information.
- Update your profile to reflect your current expertise and specialties.
- Publish at least one valuable piece of LinkedIn content.
- Review your other professional profiles for accuracy.

14. Audit Your Marketing Results
- Identify which posts, emails, campaigns, or events generated inquiries.
- Determine which activities led to actual bookings.
- Review website traffic and inquiry sources, if available.
- Decide what to repeat, improve, or discontinue next quarter.

15. Plan Your Seasonal Marketing
- Identify upcoming travel seasons, holidays, and booking windows.
- Review relevant supplier promotions and product updates.
- Plan content around your ideal clients' interests and travel needs.

- Schedule marketing activities in advance.

SECTION 5: BUSINESS PERFORMANCE AND FINANCIAL HEALTH

16. Analyze Your Biggest Wins
- Identify your three most successful bookings or client experiences.
- Determine what made each one successful.
- Identify which marketing activities or referral sources generated the business.
- Look for opportunities to repeat that success.

17. Analyze Your Biggest Losses
- Review three lost bookings or opportunities, where possible.
- Determine why the client did not book with you.
- Consider price, timing, follow-up, destination fit, and other relevant factors.
- Identify one thing you can do differently next quarter.

18. Review Your Business Numbers
- Review sales booked, travel completed, and commissions earned.
- Compare results with your goals and the previous quarter.
- Review your inquiry-to-booking conversion rate, if tracked.
- Identify your strongest sources of new business.
- Adjust your strategy based on the results.

19. Review Commission Opportunities
- Review completed travel for commissions that should have been paid.
- Follow up on missing, delayed, or incorrect commission payments.

SECTION 6: CLIENT SERVICE AND RISK MANAGEMENT

20. Audit Upcoming Departures
- Review clients traveling within the next 90 to 120 days.
- Confirm final payments, documentation reminders, and required client communications have been handled.
- Check outstanding reservations, transfers, excursions, and other arrangements within your scope.
- Ensure clients know how to reach you if an issue arises.

21. Conduct a Client File and Compliance Audit
- Check that active bookings have complete and accurate records.
- Review documentation of client decisions, approvals, and important communications.
- Confirm travel protection was discussed and the client's decision was documented appropriately.
- Review applicable supplier requirements, privacy practices, and agency procedures.

SECTION 7: OPERATIONS AND EFFICIENCY

22. Review Your Tools and Technology
- Identify software or subscriptions you no longer use.
- Review Tern templates, workflows, automations, and reminders.
- Organize digital files, email templates, and supplier resources.

23. Eliminate Time-Wasting Activities
- Review how you spent your time during the previous quarter.
- Identify tasks that consume time without producing meaningful results.
- Reduce unnecessary scrolling, repetitive manual work, and unproductive activities.
- Decide what to stop, delegate, automate, or do differently.

SECTION 8: PROFESSIONAL DEVELOPMENT AND PLANNING

24. Invest in Education

- Complete at least one training related to a supplier, destination or business activity.
- Review new products, itineraries, resort updates, and relevant supplier promotions.
- Identify one new product or destination you can confidently recommend to clients.
- Keep your knowledge current in your primary specialties.

25. Read One Great Sales or Business Book

- Select one book about sales, relationship building, marketing, customer service, or business growth.
- Complete the book or a meaningful portion of it.
- Identify three ideas worth applying to your travel business.
- Put at least one idea into practice.

26. Set Three Meaningful Goals

- Establish one sales or revenue goal.
- Establish one client relationship or business development goal.
- Establish one personal development or operational goal.
- Break each goal into measurable actions.

27. Celebrate Your Wins

- Review your bookings, sales, commissions, and client successes.
- Recognize positive client feedback, referrals, and repeat business.
- Celebrate progress toward your goals, not just the largest sales.
- Share appropriate successes with your team and recognize fellow advisors.

SECTION 9: PLAN THE NEXT QUARTER

- **My three priorities for the next quarter:**
  - _____
  - _____
  - _____
- **My Sales or Revenue Goal:**

Goal	Actual	Difference

  - If you didn't reach your goal, what will you do differently
    - _____
- **My Professional Development or Operational Goal:**
  - _____
- **What is the First Action I Will Take:**
  - _____
- **Final reminder:** Consistency builds a business. You do not have to make every change at once. Choose the actions that will make the greatest difference and follow through on them.