



# Xstream Agent Handbook

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First Edition

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# Welcome to Xstream Travel

Hello, and welcome to the Xstream Agent Handbook! Our goal with this training is to guide you through the basics of selling travel and provide you with the knowledge and the skills necessary to succeed in running your own travel business.

Before we get started, first let's introduce you to your host agency, Xstream Travel.

Xstream Travel is one of the largest host travel agencies in the country. Our head office is in Dallas Texas, where our knowledgeable staff works hard to support you and your business under the leadership of our CEO, David Manning, and our Travel Director, Madisyn Gilbert. Through our many years of our own experience selling travel, we are here to help you jumpstart your own career in the travel industry.

Ok, I know what you may be thinking: are travel agents even needed anymore? The answer is, yes! Although there are hundreds of websites online where people can book vacations themselves, there are so many options, destinations, details, and deals, that this information can become overwhelming. Consumers don't realize that just because something is listed as the cheapest option, it doesn't make it the best value. There are outside factors that many people booking online don't consider like conditions, policies, correct documentation needed for specific countries, or safety issues for their chosen destination. As travel professionals we are in the business of saving people time, providing personalized service and guidance, and adding value to our customers' experience.

So, what is a travel agent? We're a liaison, a go-between. We bridge the gap between our clients and the unknown, the unseen, and the travel supplier. Through an ongoing process of familiarization, research, continuing education, and customer feedback, we become travel experts. A career in travel is for people who like to help others, have a passion for travel, and don't mind a little research and hard work.

## So, what are a travel agent's responsibilities?

- **Research:** By qualifying our clients, we understand their travel needs and what their expectations are. We analyze current promotions, clarify the small print, investigate competitive information, and compare options based on our client's desires, needs, and budget. We then filter out all the unnecessary information and distil the product information down to what the client needs to know, so they can choose the vacation of their dreams.
- **Inform your clients:** It is our responsibility as travel agents to find out what travel documents the client needs to travel to their destination. We must also inform the client of the cancellation policy for every booking, along with the penalties. **THIS IS A MUST!**
- **Personal advocate for your client:** Because of our relationship with suppliers, we hold more buying power than the consumer when it comes to fixing issues or remedying miscommunications during your client's vacation. As an agent, we have the privilege and responsibility to serve as the client's advocate in the event something does go wrong. We are

ready to help when they panic, and ready to calm them down in the event of an unforeseen issue. Ultimately, we are their friends, and we want them to have a wonderful trip.

- **Staying up to date:** Always be learning! Travel is a constantly changing and growing industry.
  - ◆ Consider signing up at TravelWeekly.com or Travel Research Online (TRO) for travel newsletters. You can also join travel agent support networks like the National Association of Career Travel Agents (NACTA) or the Outside Sales Support Network (OSSN). You can also look into outside training opportunities with companies like The Travel Institute.
  - ◆ Check the supplier websites you use often for any updates or changes in training or procedures.
  - ◆ Consider taking FAM trips to deepen your knowledge about specific destinations or suppliers.
  - ◆ Taking advantage of Xstream's weekly calls and training webinars to be sure you are up to date.
  - ◆ Broaden your knowledge by taking Vendor or Specialized Training on your Xstream Agent Hub site or directly on the vendor's agent website.
  - ◆ Check back often to your Vendor List and the Xstream Knowledge Base (FAQ site) on your Xstream Agent Hub for any vendor changes or additional resources.

### Benefits of being a home-based travel agent

- **No commute to work:** Because you're a home-based agent, there are no long commutes to an office, saving you time and commuting costs.
- **Better balance between work and your home life:** As a home-based travel agent, you are a self-employed independent contractor who is paid by a company for providing certain services. Because you are not an employee, Xstream Travel cannot regulate or tell you how much you work, how much you sell, or where you work. There is a lot of freedom in being an independent contractor allowing you more time with your friends and family.
- **A part of a large host agency:** Host agencies are networks that help support the needs of Independent Travel Agents by offering a variety of resources, such as marketing and technology, professional development programs, ongoing support, and more.
- **Xstream Travel agent perks:** Xstream Travel offers multiple training and networking opportunities like agent exclusive trips, conventions, boot camps, and seminars at sea.

**Keep in mind:** Although there are lots of freedoms, there are also more responsibilities when you're a home-based travel agent. For example, you need to keep up with tax requirements and seller of travel (SOT) laws.

### Some helpful tips

- Though we can't tell you how much you work, we do recommend setting office hours for yourself.
- Always be professional! You are selling yourself first, travel second. Return phone calls and emails promptly, and check your voicemail daily. Remember to always be gracious, and respect yourself as well as others.

# Part 1

Ready to get started? Let's begin!

# Starting Your Business

## Name your business

Use the following as your checklist. Additional assistance can be found on the [Small Business Administration website](#).

- Choose a short name. Short names sound better, are easily recognized, and easy to remember.
- Your name should be easy to pronounce and spell. In the age of the internet, this is very important. How will your clients ever be able to find you online or on social media if they can't spell your company's name? \*Please note, do not include Xstream Travel in your business name or email address. We do not own your business, you do!
- Your business name needs to be professional. For example, don't include graphic or hateful language.
- Once you've chosen a business name, make sure it hasn't been used already by checking for trademarks. You can do this by going to the US Patent and [Trademark Office's Trademark Search Tool](#). Also, check with your secretary of state or county courthouse to make sure that that name isn't already in use.
- [File the name](#): There are websites that can help you start your business, whether by setting up a DBA (doing business as), an LLC, or an S or C corporation. One such site is [LegalZoom.com](#). For a fraction of what you would pay an attorney, [LegalZoom](#) and other services help you form and file your business structure from start to finish. For most, a DBA is all you'll need. To file a DBA, you must complete the appropriate paperwork and pay a filing fee. This is typically done with a local or county agency; however, some states require a filing with a state agency instead of or in addition to the county. Upon completion of the filing, you may begin using your DBA name.
- Domain name. If you choose to have your own personal business website, you will need a domain name. We provide you a website for your business as part of joining Xstream Travel. [Go Daddy](#) is the most widely used domain name registrar. You will also want to use search engine optimization (SEO) to monitor the activity on your site. One free service worth checking out is Google analytics.

## Create your brand

### Picking a specialty

Have you heard of the expression, "Jack of all trades, master of none?" Anyone can google basic information about a destination or product, but travel advisors are true experts in their chosen field. An inch deep and a mile wide is what the internet can do for your clients. You need to be an inch wide and a mile deep, so start small. This allows you to really focus on a specific travel product to become an expert, which makes you far more marketable in the travel industry. When you're passionate about something, your clients will sense this authenticity and be more excited about it too.

**Don't worry!** Choosing a specialty doesn't mean limiting yourself. As you can gain more knowledge in the industry, you can always consider expanding your skillset based on the interests of your clients or to grow your business.

### Ask yourself this....

Here are some questions to help you get started. Consider writing your answers and thoughts down so you can reference back to them at the end of this section.

#### 1. *What do you love?*

Find your passion, hobby, or skillset, and build your business around that. Whatever you choose, it should be something you're knowledgeable about –or – passionate to learn about.

For example, if you love Disney and have been to Disney parks multiple times, one option is to consider focusing your business on Disney and Disney vacations. You can provide intimate firsthand knowledge of the experiences at Disney the client won't get online, and your passion and knowledge will increase your confidence to help you sell the product. Plus, Disney has more than just parks, there's also Disney cruises, resorts, Adventures by Disney, etc., so there are multiple opportunities for revenue.

Disney is just one example. Here are some additional ideas:

- ◆ Food and wine tours
- ◆ Europe travel
- ◆ Eco-travel
- ◆ Solo-travel
- ◆ Weddings
- ◆ Outdoor or adventure travel
- ◆ River cruising
- ◆ Ocean cruising
- ◆ Caribbean all-inclusive packages
- ◆ It can be whatever you want!

#### 2. *Who else is selling this? Who will you market to?*

Assess the market. Take some time to google your chosen specialty. If you find a lot of other travel agents are doing the same thing, consider how you'll stand out. What can you do differently or be better at? You may even decide on another interest.

It's also important to consider who you would market to when choosing your specialty and creating your marketing strategy. If you're a part of a club, organization, church group, parent organization, etc., you might already have overlapping interests with the people in these groups, and some potential clients!

#### 3. *What are the right suppliers for you?*

The suppliers you choose to work with should complement what you're doing and share your philosophy. Try to focus on just a few suppliers so you can really get to know them, and they can get to know you! Build relationships with your suppliers and your BDMs. You'll be able to offer a more

specialized service because you have access to relationships that add more value to your client's vacation.

Xstream partners with over a hundred vendors that offer all different kinds of travel products and services. We have partnerships with dozens of suppliers specifically for cruising (both ocean and river) and all-inclusive hotels and FITs. We also partner with suppliers specializing in adventure travel like G Adventures, travel experiences specifically for young adults with Contiki, Ski vacations with Ski.com, Golf vacation packages with Golfpac, Irish ancestry trips with Brendan Vacations, Artic and Antarctic cruises and vacations with Quark Expeditions and Oceanwide Expeditions, faith-based trips with ETS, Rail vacations with Amtrak, Grand Canyon Railways or Rocky Mountaineer, and so many more!

You don't need to know which suppliers you want to work with now, but once you finish this training and have completed your XTU University training online, you will be able to access your Vendor List on your Xstream Agent Hub to view all the suppliers Xstream partners with, so keep this question in mind for later.

#### *4. What educational opportunities are available?*

Learn everything you can about your chosen niche and the suppliers you've chosen. Take their online training programs, sign up for webinars, newsletters, and email updates to get current promotions, get to know the BDMs, and ask questions. Then, consider taking a FAM trip or Familiarization trip to experience the suppliers' products and services firsthand! We'll discuss FAM trips in greater detail in a later lesson.

### Logos

Logos are a graphic representation of what you want your company to represent. It will give visual recognition to your company. Don't get too caught up in designing the perfect logo. There are services that can do that for you. Some are free, and some you must pay a small fee. Search "logo design" online to learn what options are out there.

Be sure your logo is relevant to your business. For example, if you want your travel agency to focus more on sports travel, it probably wouldn't make sense to have a logo of two glasses of champagne because that gives the impression of luxury travel.

### Business cards

You need to make sure you include your agency name, your name, your title, your logo, your phone number, your email address, and your website address. Do not include Xstream Travel, Xstream's IATA number, CLIA number, or Xstream Travel's phone number. What you can do is put that you are an Independent Agency of Xstream Travel. Eg. Sun Tours Travel Agency, an Independent Agency of Xstream Travel.

### Create a Business Plan

A business plan is a document used to describe business goals and strategies, as well as detail your financial and marketing plans for your business.



You need to answer the following general questions:

1. What will you sell? Will you specialize in a certain area at first, or will you focus on a certain type of travel?
2. Who will buy it? Who is your target market? Do some online research to figure out what demographic is likely to be most interested in your services and plan to target them specifically.
3. How will your business help people?
4. How will you market your business? Will you attend shows, events? What kind of advertising are you planning on running? How many social media posts will you have per week?
5. What will your daily operations look like? How many hours per day will you devote to this business?
6. What is your commission goal for the year? Give yourself a goal to reach for. If it is too low, adjust it and keep aiming high.
7. How will you keep track of your finances? We recommend that you speak to a Certified Public Accountant (CPA) or a tax professional for details regarding the financial set-up of your business. We also recommend you keep track of your finances. You can use any kind of spreadsheet program like Google Sheets or Excel, or you might consider an accounting program like Quicken, Peachtree, or Quickbooks. Check the SBA site for additional information about a [business banking account](#).

If you need more help, business plan templates are easy to find online. We recommend using the one from the US [Small Business Administration](#). You may also consider taking a few business courses to learn more about starting and maintaining a business, or visit the [Small Business Administration](#) site for training resources and additional assistance with helping you start your business. They also offer resources specifically for [women owned businesses](#), [minority owned businesses](#), and [business counseling](#).

You can also join American Society of Travel Agents (ASTA), the National Association of Commissioned Travel Agents (NACTA), or the International Air Transport Association (IATA) to network and learn more about the travel industry.

## Create a workflow

A workflow is a system for managing repetitive processes and tasks which occur in a particular order. They are the processes by which people and businesses accomplish their work. In a travel business, this means the steps to complete the entire booking process for your client (from welcoming and qualifying your client, through travel, and following up with them after they complete their vacation). The workflow is the foundation of how you conduct your business and should be the same for every booking you make. Consistency is key. Design a plan or checklist on how you will handle every new booking from beginning to end. This will make sure you never forget a crucial step in the booking process. We'll get more into this in our lesson on how to make a booking.

## Creating a Business Space

### Local Business Laws and Zoning

As a home-based agent you will be running your business out of your home. Be sure you're up to date on your local zoning laws to ensure you're operating your home-based business legally and within compliance. Some local laws may regulate how, and if you may convert your personal residence into a business, so it's best to find out first before you start. Contact your town, city, & county's **COMMISSIONER OF REVENUE** or **DEPARTMENT OF FINANCE** to determine business licensing requirements as well as the **ZONING OFFICE** to determine requirements they may have. You can find out more information about local business laws and who to contact by visiting your local government's .Gov website. For example, if you live in Virginia go to Virginia.gov to learn more about local business requirements. You can also visit the [Small Business Administration](#) website to learn more and take advantage of helpful business start-up resources.

### Your Home Office

Designate a work only space that will be a dedicated area within your home solely used for your business. Invest in a desk for your home office. It not only conveys professionalism, but it's also a functional necessity to help you work with documents. If you plan on meeting clients in your home, you may need a separate entrance into your office depending on local laws. Be sure to also put a lock on the door to your office. This will keep family members from wandering in and will keep your client's information secure. Lastly, be sure to keep your office clean and organized.

## Some tips on how to be successful

- **Personalize your clients' experience:** Make sure you are qualifying your clients and really understanding their needs and requirements. This will set you apart from self-service online travel sites.
- **Self-evaluate:** The market is constantly changing. Make sure you are offering competitive rates and have a variety of strategies to offer your clients the most value in their vacation.
- **Sales Skills:** Learn some sales skills. It's not about being pushy, it's about relationship building and being confident that you can convey you have found what your client is looking for. Don't be afraid to ask for the sale!
- **Professional skills:** Improve your organization and time management skills.
- **Have a good website:** The three key things to a good website are good design, good content, and make sure it's easy to update.
- **Use social media:** We will get into this more in our marketing lesson, but social media is a free marketing and networking tool that can enhance your business. Don't be afraid to use it!
- **Improve communication and writing skills:** Not only will this help you speak and write with your clients and vendors, but it also enhances your credibility and professionalism. Some libraries partner with local education programs or sites like Linked-In Learning. Check to see what free classes are available in your area that can help you build professional skillsets.
- **Don't push deals:** As travel agents we don't sell the best price, we sell the best value, and offer expert advice and personalized service.
- **Always be learning:** The travel industry is constantly changing. Be sure to always keep up to date with the latest travel products and destinations. If you specialize, this will be much easier. You can take vendor trainings, FAM trips, and learn from your client's experiences once they return from their vacation.

# Compliance

Learning about your professional responsibilities as a travel agent is a critical part of your success in this industry. Understanding what is required by the Department of Transportation, ensuring you are compliant with our suppliers, and learning how to protect yourself in areas of fraud and chargebacks will help you and your business stay secure and profitable.

While there is no official federal government body that oversees travel agencies, there is one that governs over how transportation is handled. There have been several acts passed by the Department of Transportation (DOT) that travel agents must follow and adhere to or be subjected to fines and penalties. It's important to know what these regulations are, and how you can properly inform your clients about fees and code shares. Please keep in mind that Errors & Omissions Insurance (E&O) will not cover situations which involve violations of DOT regulations. We'll discuss Errors & Omissions Insurance (E&O) more later.

It's also important to understand and follow the policies and procedures set forth for all independent contractors of Xstream Travel. While this is something everyone agrees to in order to join, we want to truly ensure you are aware of what is required of you and what can happen if you fail to comply.

## Compliance

What does it mean to be in compliance? Compliance is the act of adhering to or following a policy, procedure and/or legal requirement. When you understand what is required from you to fulfill a specific requirement or procedure, you are less likely to end up with any legal or financial ramifications due to neglect or failure to comply.

## Department of Transportation

The US Department of Transportation oversees and regulates several forms of transportation in the United States. One such body is Aviation, which is also monitored by the FAA. The DOT has created several regulations since 2012 to enhance the public's buying of airfare. All travel agents and airlines must abide by the following DOT regulations.

### [Full Fare Advertising 14 CFR 399.84\(a\)](#)

When advertising airfare, the price must include all mandatory taxes and fees so the passenger is aware of the total cost of the fare. This was enacted to protect passengers from the bait and switch fares of the discount carriers. Airlines can no longer promote a \$19 fare (for example) and then assess the mandated taxes and fees at checkout, making the fare several hundred dollars.

**WHY THIS IS IMPORTANT TO YOU:** When quoting airfare, you must quote the total cost of airfare after all applicable taxes and fees.

### [24 Hour Grace Period](#)

All US Air Carriers are to grant a 24-hour window to passengers when making a reservation for airfare one week prior to flight departure. During the 24-hour period after the initial booking, an airline cannot assess penalties or fees for cancellations or changes.

**WHY THIS IS IMPORTANT TO YOU:** As a travel agent booking air travel, it is vital to ensure you have your client's full legal name as it appears on their US-Issued ID and date of birth. Because there is a small window of opportunity for corrections, it is crucial that you instruct your clients to review the information and get back to you immediately if there is an error. Inform your client that if they don't report any errors back to you by a certain deadline, that any changes needed are subject to airline fees.

#### [Baggage Fees 14 CFR 399.85\(b\)](#)

All baggage fees must be clearly stated and a link to further information and cost must be provided to the passenger. Information on baggage fees must also be included on all e-ticket confirmations. For most trips, the same baggage allowances and fees must apply throughout a passenger's journey.

**WHY THIS IS IMPORTANT TO YOU:** Ensure your quotes and bookings contain additional information regarding baggage fees and links to the airline's baggage policy. The tour operators have this built in, but in case you decide to use another invoicing program, you need to ensure you are compliant with the Baggage Fee regulation as set by DOT.

#### [Code Share Disclosure 14 CFR 257](#)

To ensure that agents are doing business in the United States, air carriers and foreign air carriers tell passengers clearly when the air transportation they are buying or considering involves a code sharing arrangement. These disclose to consumers the transporting carrier's identity.

Example: Your client is looking to book a package with the air portion through Delta Airlines. On the client's first leg of their flight, Delta Connection Carrier Chautauqua Airlines Inc. is the actual operator of the flight and not Delta Airlines.

**WHY THIS IS IMPORTANT TO YOU:** This information must be disclosed to the client at the time you're preparing the quote and when confirming the reservation.

### **Seller of Travel Laws**

As Independent Contractors of Xstream Travel, you are all selling travel under the credentials of Xstream Travel; this also includes our Seller of Travel registrations. Xstream Travel has acquired the proper state registrations and bonds in the states that require and mandate a state seller of travel registration.

Seller of Travel laws only apply to selling travel to residents of the states with SOT laws and agents located in these states, it does not govern the sales of travel to the state by outside residents. Agents living in the states that have Seller of Travel laws must become familiar with all the regulations and laws to ensure you comply to avoid any fines or other actions the state can take against you.

#### **Living in these states can have the following restrictions on the independent contractor:**

- Cannot accept monies direct from the client as payment for any travel segment
- Cannot accept a fee, commission or other valuable consideration for arranging travel from the purchaser of travel directly. This includes service fees, which we will cover in a later lesson.
- Cannot issue tickets, vacation or lodging certificates (including gift certificates), or any other travel documents
- Must display the SOT Number on marketing/promotional materials

These can vary by state, and it is the responsibility of you, the independent contractor, to ensure you are compliant with your state and local authorities. If you are located in any of the states below -or- you are planning to sell travel to the residents in these states, please look into their requirements by using the information below. As of the creation date of this Xstream Travel Agent Handbook, Florida is the only state that you need to apply and pay a fee to the state. We have provided you with the form in your Agent Resource Center on your Xstream Agent Hub.

State	Regulation Type	Contact Information
California	Seller of Travel <a href="http://www.ag.ca.gov">www.ag.ca.gov</a>	<a href="#">Seller of Travel Program, Dept. of Justice</a> 213.897.8065
Delaware	Professional Business License <a href="http://www.revenue.delaware.gov">www.revenue.delaware.gov</a>	<a href="#">Division of Revenue</a> 302.577.8200
Florida	Seller of Travel <a href="http://www.800helpfla.com">www.800helpfla.com</a> <a href="#">Print Exemption Form</a>	<a href="#">Division of Consumer Services</a> Seller of Travel Program 800.435.7352
Hawaii	Seller of Travel <a href="http://www.hawaii.gov/dcca/pvl/programs/travel">www.hawaii.gov/dcca/pvl/programs/travel</a>	<a href="#">Travel Agency Program</a> Dept. of Commerce & Consumer Affairs 808.586.3000
Illinois	Special Disclosure & Refund Rules / No Registration <a href="http://www.illinoisattorneygeneral.gov/">www.illinoisattorneygeneral.gov/</a>	<a href="#">Attorney General</a> 217.782.1090
Iowa	Seller of Travel <a href="http://www.sos.state.ia.us">www.sos.state.ia.us</a>	<a href="#">Office of the Secretary of State</a> 515.281.5204
Louisiana	Professional Business License <a href="http://www.sos.louisiana.gov">www.sos.louisiana.gov</a>	Secretary of State 225.922.2880
Massachusetts	Special Disclosure & Refund Rules / No Registration <a href="http://www.mass.gov">www.mass.gov</a> , click on AG	Attorney General <a href="#">Antitrust and Consumer Protection Division</a> 617.727.2200
Minnesota	Travel Contracts / Membership <a href="http://www.revisor.mn.gov/">www.revisor.mn.gov/</a> No Registration	Office of the Revisor of Statutes 615.396.2868
New York	Truth in Travel Act / No Registration <a href="http://www.ag.ny.gov">www.ag.ny.gov</a>	<a href="#">Office of the Attorney General</a> 518.474.2121

Pennsylvania	Motor Carriers Transportation <a href="http://www.puc.state.pa.us">www.puc.state.pa.us</a> No Registration	Public Utility Commission <a href="#">Bureau of Transportation &amp; Safety</a> 717.783.5010
Washington	Seller of Travel <a href="http://www.dol.wa.gov">www.dol.wa.gov</a>	<a href="#">Sellers of Travel Licensing Program</a> Department of Licensing 360.664.6634

Table from <https://www.asta.org>

### California

Agents who currently reside in the state of California are automatically added to Xstream Travel’s list of agents sent to the California Attorney General. If you are actively marketing and selling travel to residents in the state of California, but you are not a resident of the State of California, you are required to follow all the state regulations and be listed on Xstream Travel’s Agent List. To be added to the list, email [support@xstreamtravel.com](mailto:support@xstreamtravel.com) with the subject line California Seller of Travel Non-Resident. The body of the email needs to have your full name, business name, address and telephone number. Agents selling travel in the State of California or to residents of the State of California must clearly display the Seller of Travel Number on all marketing and promotional materials, including websites, flyers and business cards. You must also clearly have the following verbiage displayed - “Registration as a seller of travel does not constitute approval by the State of California”. Violations or infractions reported to the State of California can result in fines up to \$25,000 and jail time. Take the time to familiarize yourself with the State’s Law and Regulations to ensure you comply to avoid any infractions.

### Florida

The State of Florida requires all Independent Contractors of Sellers of Travel to register annually by completing the Sellers of Travel Independent Sales Agents Statement of Exemption. This form can be found in your Agent Hub under Resource Center. You must complete and send the form to the Department of Agriculture along with an annual filing fee of \$50.00. Failure to register can result in a penalty fee of \$5,000 and each sale made outside of your registration filing can be counted as a separate incident, resulting in the penalty fee being assessed to each incident. The State can also place cease and desist order on your business from selling in the state.

Agents selling travel in the State of Florida must also display the following on all marketing and advertisements - “Fla. Seller of Travel Reg. No. ST38987”. You must also display the certificate issued by the Florida Department of Agriculture and Consumer Services where you are doing business.

### Making Payments

As an Independent Contractor, you must collect and apply all payments for your customers to their travel reservation. In compliance with Xstream Travel’s Policies & Procedures and Seller of Travel Laws, independent contractors cannot process client credit cards directly (via personal Square, PayPal or other method) or collect monies into their own personal bank account for the purpose of making payments with their business or personal credit cards. Only the vendor should process the client’s credit card. Credit cards are the best way to take payment from your client, as you can process their payment

directly on the supplier's booking site. This way, there is no doubt that money has been paid, and the client may be entitled to additional insurance benefits (have your client check his/her cardholder benefits for automatic and/or added travel insurance protection). In addition, it makes operating your business much simpler. When using a credit card, the payment is simply processed through to the supplier's booking site.

#### Agency to Receive All Commissions

In the event an Independent Contractor or his/her clients send any monies (cash, check, money order) directly to the supplier for a booking made using Xstream Travel's ARC, IATAN, CLIA, or Booking Identification Number, this Independent Contractor Agreement will be deemed in breach and may be terminated. All credit card transactions are to be transacted and processed by the Independent Contractor directly with the supplier/vendor. If the Independent Contractor authorizes or requests any supplier/vendor to send commission directly to the Independent Contractor when using Xstream Travel's ARC, IATAN, CLIA, or Booking Identification Number, bypassing Xstream Travel, this Independent Contractor Agreement will terminate immediately, and Independent Contractor will forfeit any and all unpaid commissions.

#### Fair Trade Act

The US Fair Trade Act protects consumers from fraudulent activity. The act requires all merchants to refund the original form of payment for any and all refunds due to the client. There are no exceptions to this act. In the event a client closes the account of their original form of payment, the merchant must make several attempts to return the credit to the issuing authority which can take up to 180 days or longer. Clients who are using a prepaid credit/debit card should be informed that they need to hold onto the card until after travel in case they are due refund or reimbursement.



# Marketing

## Introduction

What is marketing? Marketing refers to looking for strategies to find clients, understand their needs, influence their buying habits, and identify how your company can benefit from it. The point of marketing is to make selling easier. Simply, it involves a strategic plan to determine who is most likely to do business with you, generate awareness of your company to that audience, sell your product (travel), build a loyal client base, and evaluate your marketing efforts so you do better in the future.

## Goals

1. **GENERATE LEADS:** This means reaching new potential clients and adding them to your email list and CRM. This helps you acquire new clients to grow your clientele base and sales.
2. **INCREASE BUYER FREQUENCY:** Getting past clients to book again.

## Who Uses a Travel Agent?

In an age where clients can book vacations online themselves, it's important to understand why travelers still come to travel agents for their travel needs. Travelers are more likely to turn to a travel agent when they have travel arrangements with numerous details, their time is limited, they are seeking advice or expertise, they are unfamiliar with the travel industry, or are overwhelmed with choices. As a travel agent you are offering expertise, value, and convenience to the traveler. Your success as a travel agent will depend on your level of professionalism and providing a consistent level of excellent service.

## Marketing Tools provided by Xstream

### VacationCRM

First you need to create a client database (CRM). Who do you know? The first thing you do after you've started your business: tell everyone that you're a travel agent. You'll be surprised how much business you get just from telling people what you do. You want to make an organized list of prospects of everyone you know: friends, family, neighbors, doctors, mailman, anyone. You need their name, their phone number, and their address. This will be an ongoing list, so you'll add to it often. If a client traveled to an all-inclusive resort and loved it, make a note of it. If a client is allergic to gluten, gets sea-sick, or hates long lines, make a note. Little things like this make your clients feel cared for and they help you save time. As part of you joining Xstream Travel, we have provided you with a CRM software tool called VacationCRM© which we'll discuss in greater detail in a later lesson.

### TRAVELSAVERS

Qualified agents have access to the marketing tools and promotions on the TRAVELSAVERS website. Xstream Travel has partnered with TRAVELSAVERS, the travel consortia network with more than 2,800 agency members around the world. As an extension of Xstream, TRAVELSAVERS is committed to championing the value of a travel professional.

TRAVELSAVERS provides Xstream agents with the opportunity to use innovative tools and technology to help grow your business and increase your revenue with a personalized path to financial success. These

tools include effective marketing programs, cutting edge technology, long standing preferred supplier partnerships, dedicated service team, training & networking opportunities, and more!

### What is Target Marketing?

Who are you trying to sell to? It's unrealistic to think that you can attract everyone to your business. Defining your target market -or- the specific kind of person that is most likely to do business with you, helps you decide where to commit resources and what kinds of promotional methods and messages to use.

The reason you target a specific market is that only a segment of the population is likely to purchase any specific products or service. By taking the time to focus your marketing efforts to the correct people you'll be more successful and not waste your time, money, or effort.

Your target market should be what you have access to and what you know well. It could be based on demographics like age, sex, race, income, interests, or beliefs. It could also be geographic, like the nearness of customers to your location. Some focus on the purpose of travel. For example, are they mainly business travelers or leisure travelers? Whatever you decide, your target market should be what you have access to, and don't worry, it can change. Again, if you know outdoor sports well, you probably know the kinds of people who want to do active tours, so you probably already know a few people who are interested in this kind of travel or at least where to find people who would be.

### Identify Your Market: The 4 P's

1. **Product:** What travel products will you sell? Will you specialize in a specific type of travel? You should sell what you know or what you're interested in. For example, if you are a very physically active person who loves to camp and enjoys outdoor sports, focusing on river cruising may not be using your knowledge and passion wisely. Active tours or adventures may be more your style. You don't have to limit yourself to one area or specialty, but when starting out it will be easier to sell what you like and what you know.
2. **Price:** What is the price range of the travel you are looking to sell? For example, luxury cruising vs. budget or family cruising.
3. **Promotion:** How will you promote or advertise your business?
4. **Place:** The how and where you will do business. Will you primarily be in person, over the phone, or online, or in an office?

### Market Research

Market research is the process of gathering information about customers and products. This can be obtained directly from surveys and questionnaires you collect from people you know and clients, or information you can get from a third party like a website, your city/state/country, or a survey/polling company. The information you gather will not only help you determine your target market, but it'll also help you identify trends or changes in your market and develop a marketing strategy that will be more effective. Consider using a free survey service like Google Forms or Survey Monkey. Even just a quick satisfaction survey email to a client after their trip is a great start!

## Different Types of Marketing Strategies

Rarely does a product just sell itself. You must promote your business in order to communicate the types of services and travel products you sell. To do this, you will advertise both yourself and your business to the public. Below are a few ways to advertise:

- **Print:** Advertisements in newspapers, magazines, fliers, door hangers, etc.
- **Direct mail:** Letters, fliers, brochures, or newsletters that are distributed through postal mail. To learn more about advertising through postal mail, please visit <https://www.usps.com/business/advertise-with-mail.htm>. Mailings lists are compiled from your own company records, local directories, or from mailing list companies.
- **Radio and television:** For radio, you can pay to have a radio host read your ad or pay to have a commercial created and played on air. Television commercials are more expensive than radio ads and pricing for both depends on the channel, frequency the ad is played, and time of day it runs. Both options will help you reach a very large and diverse audience including those outside your target market, but the downside is it's very expensive compared to the other types of advertising. Contact your local TV and radio stations for information about pricing and additional details.
- **Digital Marketing:** Email, website, banner ads, podcasts, and blogs. You can email newsletters and promotions to your client base, pay a host of a podcast to read your ad on their show, or pay to place advertisements on websites or blogs. The advantage is that your advertisement is accessible 24-hours a day, every day.
- **Social media:** Twitter, Tiktok, Facebook, Instagram, Pinterest, Tumblr, etc. Each platform is different and has its own benefits. Start with a social media platform you already know and use. Social media can help your business with increasing brand awareness, increasing traffic to your website, generating new clients, and eventually increasing profits. This option is appealing to most agents because posting is free, most platforms provide analytics to business pages, and you have the option to buy sponsorships or advertising boosts to reach a larger audience at reasonable rates. You also have the opportunity interact with your audience to get feedback, network, and build community with your clients.
- **Cooperative advertising:** An agreement where suppliers and agencies share the costs of advertising to reach a target audience together. This option offers small businesses the ability to reach a wider audience they wouldn't have been able to afford separately. You can reach out to local businesses or groups like churches, scout groups, clubs, neighborhood markets, etc., that already have existing patrons or clientele. Also consider supporting local events and sharing the cost of a table with another like-minded business. It is a great idea to contact your local Chamber of Commerce.
- **Word of mouth:** Tell everyone you know! Also consider establishing a customer incentive program in order to reward current clients that refer new clients to you. You could offer a gift certificate to local restaurants or stores, a voucher for discounts on future service, or anything else you choose.

## Marketing Plan

You can find free marketing plan templates and examples online. Here are the main points to include in your plan:

1. **List your goals:** These should be realistic. Remember, it's ok to not reach all your goals. Learn from mistakes to do better next time.
2. **List your budget:** How much money and time do you realistically have to contribute to your marketing campaign?
3. **Explain your research:**
  - Competitive Analysis: Research your competition
  - Subscribe to your competitors' (or those you perceive to be your competitors) email lists.
  - Follow your competitors on social media.
  - Examine what content your competitors are creating (What are they saying and how are they saying it?) and what marketing strategy are they using (print mail, direct mail, social media, etc.)?
  - SWOT Analysis: Knowing yourself and your company
  - List your strengths, weaknesses, opportunities, and threats (SWOT)
  - Buyer persona: Understanding the type of client that wants to book the travel you sell.
    - Talk to people! Ask family, friends, potential clients, etc., to give insight into why they have or would book the kind of travel you sell. Why do they prefer this type of travel, what would catch their attention (print ads, social media, direct mail, etc.) and what would influence their decision to buy (location, time of year, price, etc.)?
    - Make sure to follow up with past clients to evaluate their trips and experiences working with you to fine tune your marketing strategies in the future.
4. **Explain your strategy:** Now that you know your competition, yourself, and your client market, explain how you will reach your goals. What type of marketing will you use? (Social media, direct mail, print, etc.). You can use more than one depending on your budget and how much time you have. How often will you advertise? (Includes community engagement and networking in person and social media). Make sure to set a timeline for your marketing campaign. How long depends on the purpose of the campaign (is it just to generate new clients or is it for a specific vacation package you are promoting?). For specific vacation packages or cruises, you should begin your marketing plan about 6 months in advance of the travel date to give yourself plenty of time to market, organize, and book your client.
5. **Tracking and Evaluation:** After you implement your marketing plan, evaluate what worked, what didn't, and how well or not. This helps monitor the effectiveness of your marketing efforts and is especially helpful with determining how you will market in the future to save you time, money, and help you reach more clients.
  - Put a keyword or phrase on your advertising materials as a code that way when a client comes to you, you will know which advertisement worked and how well.
  - Monitor analytics on the social media sites you use (keep track of likes, views, shares, etc).

- How much did you spend vs. how much business did you earn? This information will help you create your marketing budget for your next marketing campaign. If you are spending far more than you're earning, it's time to come up with a new marketing strategy.

This might seem like a lot of work (and it is!) but your goal is to be successful. The benefit of working for yourself is that you control how much and how little you put into your business. If something doesn't work, change it. You're the boss!

## Vendor Marketing tools

Now that you know a bit more about marketing and how to get started, the next step is to create your advertisement. You don't need to be formally educated in marketing or advertising! The great news is that many vendors already have marketing tools available to you. Not every vendor you want to use may have marketing tools but most of the larger vendors have them, so take advantage of them when they're available. Once you become more comfortable with advertising you can consider creating your own ads, but you don't need to reinvent the wheel.

Let's look at a few examples

## Delta Vacations

Once you request and receive access to Delta Vacations (also known as World Agent Direct- formally MLT) and login, you will see multiple tabs on the top menu. Choose the tab called "Marketing Materials." You will then be directed to enter the Delta Vacations Marketing Hub.

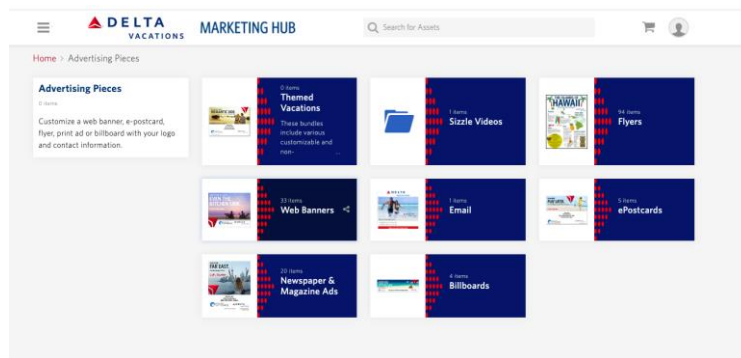
The screenshot shows the WorldAgentDirect interface for Delta Vacations. At the top, there's a navigation bar with the 'WorldAgentdirect' logo and a 'DELTA VACATIONS' header. A menu bar includes 'Booking', 'Special Deals and Offers', 'Resource Center', 'Marketing Materials', 'Agent Incentives', 'Sales Training', and 'Destination Info'. The main content area is split into several sections:

- BOOK A VACATION:** Includes a 'Package Type' section with radio buttons for 'Flight + Hotel', 'Flight + Car', and 'Hotel Only'. Below this are search filters for 'Origin Code', 'Dest Code', 'Search Flights By' (Best Price or Departure Time), and 'Filter Flights By' (Stop/Nonstop). There are also fields for 'Depart Date', 'Return Date', 'Flight Time', and 'Nights'.
- FIND YOUR ALOHA:** A promotional message for SkyMiles members, stating they can save up to \$250 per flight + hotel getaway to Hawaii. It includes a 'BOOK NOW >' link.
- BOOKING MAINTENANCE:** A section for managing bookings, with search options for 'Enter booking number' or 'Enter traveler last name/first name'. It includes links for 'View my online bookings', 'Retrieve travel documents', and 'Manage group contracts'.
- Special Deals and Offers:** A list of current offers, including 'BERMUDA VACATION PACKAGES', 'GREECE VACATION PACKAGES', and 'SKYMILES MEMBERS ONLINE ONLY LIMITED-TIME OFFER'.
- Themed Vacations:** A list of vacation themes, including 'Luxury Vacations', 'Romance Vacations', 'Walt Disney World® Resort Vacations', 'Groups and Flexible Getaways', and 'Ski Vacations'.

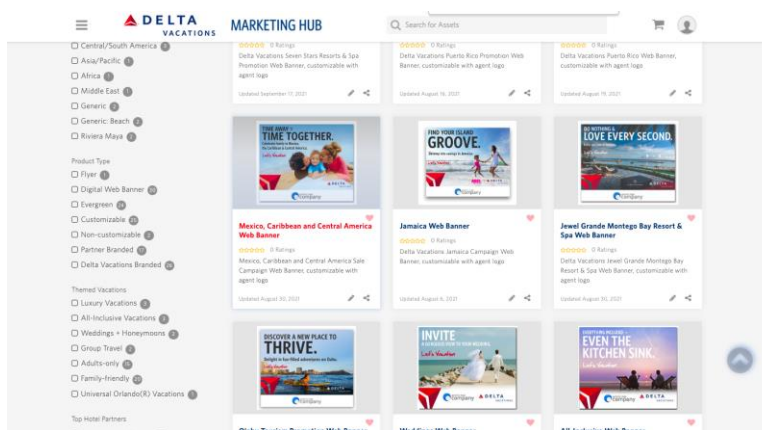
Here on the Marketing Hub you'll see a wealth of advertisements in many different formats that are specific to the type of marketing you're planning. For example, for social media marketing, click on "Social Media."



From here, you can choose different types of marketing materials. Let's choose advertising and then select web banners. You'll see different types of files depending on your medium. We're choosing a web banner, but you could also choose email templates or flyers.

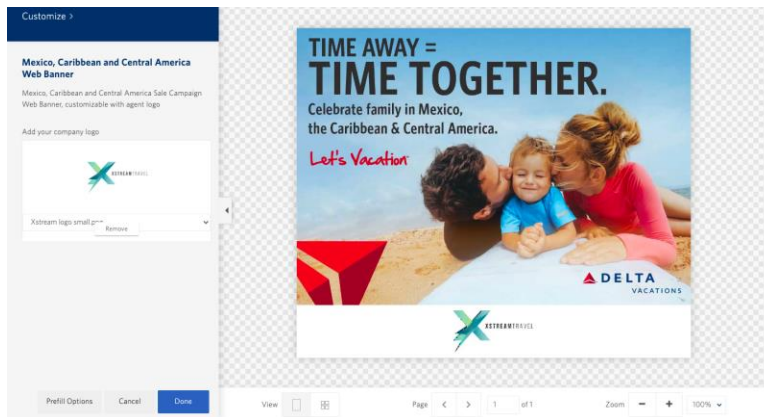


The next page will show dozens of ads that you can scroll through and select based on the current promotion or vacation you're trying to sell.

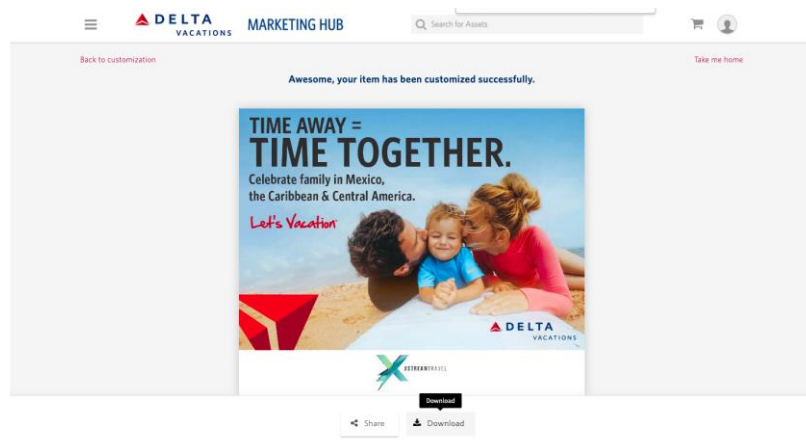


I've selected the banner for Mexico, Caribbean and Central America. I then clicked customize.

From the next page I uploaded my logo and applied it to the banner.



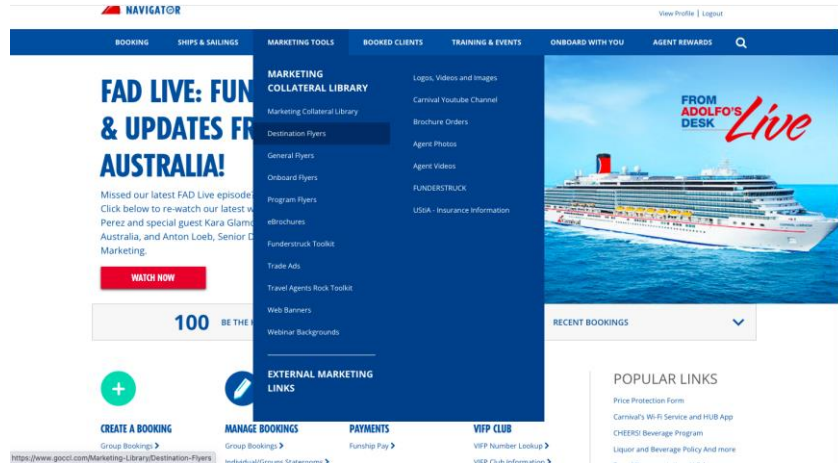
I then clicked “Done,” and now have the option to upload my image for my social media post. Be sure to give your contact information and any additional information or pricing for your promotion!



It's that simple!

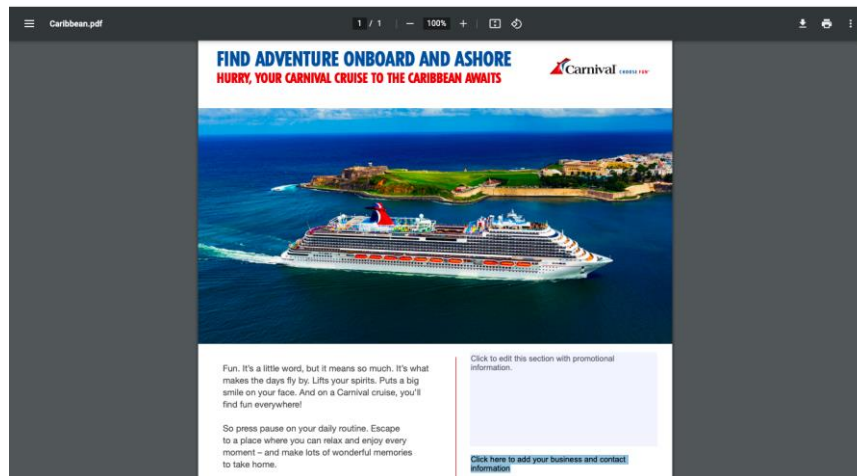
## Carnival

Next, let's look at print advertising with Carnival



Once you register with Carnival (by following the instructions on your Vendor List) and login, scroll over the “Marketing Tools” tab from the top menu. From here you will see all the resources categories they offer like ebrochures, different kinds of fliers, web banners, and options to download videos, logos, and other images. From here let's click on “Destination Fliers,” and then on the Caribbean.

Once you download the flier, insert the information about your promotion, and add your logo and contact information at the bottom. Then you're all set! Just print and distribute.



These are just two examples of the different types of premade marketing materials that are available to you. Most major vendors, especially our preferred vendors, have marketing tools waiting for you to utilize them. They are completely free to you, so please take advantage of free resources at your disposal.



## Marketing for Groups

Now that you know more about marketing and have seen a few examples, next let's cover marketing for a group. These are also called "speculative groups," where you block group space with a supplier without predetermined clients beforehand, with the goal of marketing to the public to fill spaces in your group. Who can you sell a group cruise or land package to? They can be friends, family reunion, alumni groups, weddings, country-western groups, choir groups, business incentive travel, senior groups, community groups with neighborhood members, hair stylists, country club members, dance clubs, health clubs, and on and on. Any way you can classify people, you can make a group for them.

### Marketing Groups/Speculative Groups

1. First you need to start nine to twelve plus months in advance to give yourself time enough to plan, market, organize, and book your client's group. This also gives the clients enough time to plan and budget for their trip.
2. Next, select the cruise or itinerary for the vacation package.
3. Then, prepare fliers, postings, and/or social media advertising. Remember, check for marketing materials that have already been prepared by the vendor. Save yourself time and money by using free tools available to you!
4. Lastly, present the cruise/vacation package to the potential group members. It's helpful and polite if you approach whoever leads the group first to let them know about you and your group cruise/vacation package to get permission to reach out to their members. Once you receive consent, remember to include all the important details about the booking like date, price, location, and any promotional details or specials associated with the booking. Don't forget to add your name, how to contact you, and your company logo. The group needs to know how to contact you. This should always be *YOUR* contact information, not Xstream's.

Here are a few ideas on how to market your group:

- Set up a table or do a presentation and speak to people about a group cruise.
- Contact the head of the group and request they hand out your promotional advertisements to gain interest.
- Never downplay the importance of word of mouth. Tell anyone and everyone you know!
- Host a cruise night. This is basically a party that you set up in order to tell people about your cruise. It can be at your house, it can be at a venue, whatever you want to do.
- Social media and digital marketing: After speaking with the leader of the group for permission, ask to join their social media page and post your advertisement created from the vendor's marketing materials. You can also prepare an email advertisement and ask that the leader of the group send it to their group members.

*The number one way to market your business is you need to have a teachable, positive, amazing attitude with everyone you encounter. You never know where your next client will come from!*

## Service Fees

You are a travel expert providing a valuable service to your client that involves time and hard work. How you set up your business is up to you, but it's important to realize you're not just in a service business, you're in a relationship building business. When establishing your relationship with your client you want to build trust and show your value.

Charging a service fee results in not only making a commission on your booking, but also receiving another reliable source of revenue for your business. The key to charging fees is your mindset. Let the customer know what you will do for them, earn their trust, be transparent, and then do the work and do it well! When you feel comfortable and confident asking for a service fee, the client will be comfortable paying it.

Charging a service fee can also help you weed out the "window shoppers" and "value shoppers" just trying to find the cheapest price. You are not a human booking engine! Charging a service fee can help you find higher-quality and repeat clients that will appreciate you and value your services. As much as you love travel, it's also your job. Even if you decide not to charge a service fee, do not tell your client your services are free. It diminishes the value of your work and time and could inhibit your ability to start charging fees in the future if you decide to do so.

### Seller of Travel Laws

Seller of Travel (SOT) laws require travel agencies to register, they regulate sales by travel agencies, and usually require financial protections for consumers. They primarily affect anyone living in or selling to residents that live in a state with SOT laws and may affect your ability to collect services fees for your bookings. Xstream's SOT licenses cover our agents as independent contractors so long as you do not break SOT laws. Before you collect a service fee, please check on your local SOT law. For additional information about SOT laws, please review our lesson on compliance.

For many bookings, you will be able to charge a service fee through the supplier. When the supplier does not have this ability, you may need to apply for your own seller of travel number, if you or your client lives in a state with an SOT law, and charge your fees through your own merchant account (Stripe, Square, PayPal, etc.). If you go this route, make sure you have your own Errors & Omissions insurance policy.

### How to charge a service fee through a supplier

Not every vendor allows you to add a service fee on your booking, but many do! Most of the time it's in the final stages of the booking process. To find out if and how a vendor does this, we encourage you to do the vendor's training or contact the vendor directly for more information.

Services fees received through the vendor are treated as commission and follow your normal commission schedule. Meaning, if you are a New Face or Tier 1 agent, you will receive 75% of the commission. If you are a Tier 2 agent, you will receive 85% of the commission.

### What to charge

This is totally up to you! Each booking is different. Here are some reasons agents charge a service fee:

- **Cancellations:** Most vendors don't pay commission on cancelled services. If your only income source is the commission on your booking and your client cancels, a non-refundable service fee or a cancellation fee may help you retain some income in these circumstances.
- **Time Intensive Bookings:** Bookings that take a lot of time to book like large groups or FITs with multiple travel components.
- **Low-commission Travel Components:** If your client only needs assistance with a car rental or a transfer-only reservation. Charging a fee will supplement your income.
- **Non-commissionable Components:** Some products or services are non-commissionable through the vendor. These are usually add-on services like air-only and rail-only tickets, trip changes, etc. Adding a service fee will ensure you are compensated for your time and hard work.

Do some research and figure out the average fee in the current marketplace for travel agents. Google or ask on the Xstream Facebook page to see how much other travel agents are charging. Your fees are not the place to show you are the least expensive. Consider that higher fees can be perceived as higher value, but your decision should be based on your budgetary expectations as well as be within the means of the client.

As you book, you'll get a clearer idea of how service fees can supplement your income and can refine your service fee model to meet your goals. You should then incorporate your service fees into your business plan. Figure out about how much you'll make in a year in commission and determine what you need to charge to meet your revenue goals.

It's important that you communicate your fee schedule to your client and be sure the client physically signs a service agreement agreeing to your service fee schedule.

Different service fee models include:

- **Flat fee:** One standard fee upfront to cover all the research and planning for the client's trip regardless of number of passengers or type of package. Many agents start at \$100-\$250 per booking (ultimately, it's up to you).
- **Per Person Fee:** This fee would be a flat charge upfront for each passenger on the trip. This is popular for large groups.
- **Hourly Fee:** A charge per number of hours it takes you to plan, research, and book a trip for your client regardless of number of passengers or type of package.
- **Transaction Fee:** This fee would be for each type of service or add-on like an air or rail fee, excursion fee, car rental fee, etc. This means the client would be paying depending on how complex their package becomes.
- **Plan-to-go Fee:** This type of fee is a service fee that you charge upfront but then later apply to the cost of client's trip. This disincentivizes window shoppers and can be charged in any of the models above. It's also a great option for agents apprehensive about fees to get familiar with them.

Here's a sample service fee chart. Remember, what you charge is ultimately up to you

## SAMPLE SERVICE FEE SCHEDULE

Your fees should be in line with your expertise level

Type	Service	Amount - per person	Note
Flat Fees	Domestic Air Ticket	\$25 - \$50	
	International Air Ticket	\$50 - \$100	
	Car Rental only	\$25	
	Rail - Domestic	\$25	
	Rail - International	\$50 - \$100	Depends on the complexity of the trip.
	Hotel only	\$25	
	Excursions/Activities	\$25	
	Trip/Itinerary modifications	\$50	
	Cancellation	\$50	
	Cruises	\$25	
	Additional Quotes (First 2 are included)	\$40	Provides 2 additional quotes
Planning Fee		Starting at \$100	Depending on the complexity of the trip
Consultation Fee		Can be an hourly fee or a flat fee	1st meeting is complimentary

### Additional options to consider

You may also consider promotions to encourage repeat clients like only charging fees on the first vacation for your client, and then waiving their fee for their next vacation. Another idea is to waive your fees on the client's next trip if they refer a client to you that travels.

### What should I call the fee?

Some people don't like the term "service fee," and that's ok! Here are a few terms you can use:

Travel design fee, service charge, consulting fee, consultation fee, research fee, concierge fee, agency management fee, processing fee, research & design fee, retainer fee, and customization fee are all great ideas. For transaction fees (per service), some agents list a "Fee Menu," which list the fee per service.

### When do I charge the fee?

Set a process. Decide when and how you will approach the service fee with your client. We recommend a process that looks like this:

1. **Qualifying call:** This is the stage when you're getting to know the client and determine their needs
2. **Set expectations:** Be clear about what the client can expect from you and the value you can bring to their vacation experience.
3. **Explain your service/research fee:** Most agents decide that it will be non-refundable, but this is up to you.
4. **Collect your fee:** Many agents collect their fee before the client's quote is delivered. When you collect your fee is ultimately up to you.

### How do I bring up service fees to my client?

First, ask your client if they've ever worked with a travel advisor before. If no, remind them of the

benefits of working with you and how you can provide a more personalized experience than they would find on some online booking tool like Priceline. They don't have to manage hours of research or details of the booking, insurance, additional services, etc. YOU are going to handle this for them so they can just relax and enjoy their trip.

You could also consider beginning the relationship with your client by offering a complimentary 30-minute consultation. This will allow you to qualify the client to determine if you're a good fit for each other. It will allow you to build trust and allow you the time and space to approach your fee schedule.

Here's a sample pitch for your client:

*"This non-refundable retainer fee covers my time in researching, planning and arranging services with my suppliers. When you retain my services as your trusted travel advisor, I get to work confirming all reservations, sending you detailed confirmation materials, requesting exclusive upgrades and perks, when available, and acting as your advocate before, during, and after your trip."*

**Important:** Be sure the client physically signs a service agreement agreeing to your service fee schedule.

Where can I find a sample of a service fee agreement?

Templates are easy to find online. You can google "Service fee acknowledgement template," or check sites like [Jotform](#), Formswift, TravelJoy, etc. You can also ask your fellow agents at Xstream if they are comfortable sharing their template! Join the private [Xstream Facebook group](#).

How to charge the fee:

1. Your own merchant account: Quickbooks, Paypal, Square, Venmo, ARC Pay, etc. Some merchants may consider travel high risk. You may consider labeling the fee as a "Consultation fee."
2. Through the vendor: This option applies to vendors that allow a markup, and may be the only option for agents or clients in states that have Seller of Travel laws. These fees are processed as commission and will be paid out on your normal commission percentage schedule (New Face and Tier-1 75%, Tier-2 85%).

# Part 2

## The Booking Process

# Booking Credentials

## Travel Industry Segments

There are many segments of the travel industry, however the main segments fall into three major categories: suppliers, distributors, and supporting organizations.

1. **Vendors/Suppliers:** Often the terms are used interchangeably. Vendors own the travel services or products travelers use including transportation, food, entertainment, attractions, and boarding accommodations.
2. **Distributors:** Distributors act as intermediaries between suppliers and travelers. Examples are travel agencies and tour operators.
3. **Supporting businesses and organizations:** These provide travel-related services like travel insurance, or aid or regulate the travel industry like the American Society of Travel Agents (ASTA) or Cruise Line International Association (CLIA).

## Using the Correct Credentials

It is important to use Xstream Travel's correct credentials when either registering or calling vendor suppliers. This is what identifies you as an agent with Xstream Travel, and it lets the vendor know where to send the commission for your booking. These credentials are NOT to be shared with anyone other than vendors. Some vendors will ask for our IATA number, some will ask for our CLIA number, and cruise lines will ask for our agency phone number. On occasion you may be asked for our ARC number. That would be our IATA number. The only exception to this is when logging into VAX or calling any of the Apple Leisure Group Companies. We have a separate different identifying number for them. All Xstream agents have access to these credentials once they've completed the Xstream Travel University training.

- **IATA Number**– International Air Transport Association. The identifying number assigned to a Travel Agency by IATA.
- **ARC** – Airlines Reporting Corporation. We do not belong to ARC. If asked for our ARC number, please give Xstream's IATA number.
- **CLIA Number**- Cruise Line International Association. CLIA assigns an identifying number to their Travel Agency members. Ours is the same as our IATA number.

## IATAN Card

The IATAN Card identifies bona fide U.S. travel sales professionals. This photo ID contains your name, unique identification number, the name of your agency and numeric code prominently embossed on the surface. The IATAN Travel Agent ID Card is part of a global program that identifies working personnel associated with IATAN Airline Appointed Agencies. As an agent with Xstream Travel, your IATA card will include Xstream's IATA.

## IATAN Card Eligibility Requirements & Conditions

The applicant must meet **ALL** the following conditions:

- Be an owner, employee or an independent contractor of an IATAN accredited location.
- Be registered with IATAN.

- Devote a minimum of 20 hours per week to the business of selling travel.
- Earn a minimum of USD 5,000 in net commissions in the prior 12 months (rolling year).
- Be at least 18 years of age.
- ID Cards have a one-year validity. Fees are non-refundable. First time new ID card fee is \$40.00
- The fee to renew an IATAN card is \$35.00. Payment will be made direct to IATAN by American Express, MasterCard & Visa.

Visit the IATA site for additional [rules & conditions](#).

## CLIA

To qualify for CLIA Individual Agent Membership (IAM), your affiliated agency must be a current CLIA Travel Agency Member. Xstream Travel is a Premier Agency Member. CLIA recommends that agents generate a minimum of \$5,000 in total agency commissions from cruise bookings within the 12 months prior to enrollment. We currently waive this requirement. Travel Agency Members maintain absolute discretion over their IAM approvals and denials. CLIA maintains complete authority over the acceptance and cancellation of its members.

To become a CLIA member:

- Visit [www.cruising.org](http://www.cruising.org) and create a new CLIA account to access their website. Click Register
- Fill out the registration form
- You will need to upload your picture of yourself for your Embarc Card
- Company Affiliation: Enter Xstream's name or CLIA number. We will come up and you click on add affiliation. Primary Affiliation. You have now created your CLIA agent profile. You are not a member yet!
- Click on Join/Renew
- Click on Individual Agent Member
- Pay the reduced fee because we are a Premier Agency
- Your card will be mailed directly to you. Be sure you put in *your* mailing address.

Benefits for a CLIA Individual Agent Member:

- ❖ Establishes you as a credible seller of cruise travel
- ❖ Provides instant recognition with the CLIA EMBARC ID
- ❖ Offers comprehensive training, certification and professional development opportunities
- ❖ Rewards you with exclusive personal travel benefits and discounts
- ❖ Affords you access to cruise line and Executive Partner Member income opportunities and training



# Making a Booking

## Qualifying your client

Now that you have a client, you've reached one of the most important steps in planning the perfect vacation; qualifying your client. In other words, asking your client specific questions that help you understand their personality, desires, and their needs and requirements for travel. You need to properly get to know the client and determine their needs and expectations before you begin doing your research to find what they're looking for.

The most important things to keep in mind while qualifying your client are to listen, take notes, ask questions, and ask for elaboration when needed. You'll begin this process by asking a series of open-ended (requires more than a word or two to answer) and closed-ended (Yes or No, or short answer) questions. Be sure to have some questions ready before you meet with your client but allow the conversation to flow naturally. You don't want the client to feel they're being interrogated. Make sure the atmosphere is light and friendly.

**Important tip:** You need to put your own preferences aside because your client is the priority. For example, you might like to travel on a budget and stay in hostels, but your client likes to stay in three to four-star hotels. There's nothing wrong with that. Remember, you're not the one traveling, your client is traveling, so you need to make them the priority.

## Open-ended questions

Here are a few examples of some open-ended questions you will want to ask your client. The point is to get them talking so you get a feel for their personality, the kind of travel they like, and what their expectations and needs are. These are particularly helpful if the client is not sure exactly where they want to go.

1. Why do you want to go on vacation?
2. What would your dream vacation look like?
3. Have you travelled in the past, and what did you or didn't you like about the experience?
4. What are you interested in/what are your hobbies? What do you like to do for fun?
5. Are you celebrating anything special? Anniversary, birthday, etc.
6. Do you prefer strict schedules or more leisure time, and why?

## Closed-ended questions

Here are a few examples of some closed-ended questions you will want to ask your client. The point is to get specific answers that will help you get the information you need to begin your research.

- **Contact information:** Full legal name, address, email, and phone number. Ask what's the best way to get a hold of them. If more than one person is travelling, be sure to get their contact information as well.

- **Date and Duration:** Ask for dates or a date range of when the client wants to travel. Is there flexibility, or do they have specific dates they need to leave and come home? Be sure to also ask how long they would prefer to travel. For example, maybe the client has June 1-12<sup>th</sup> off work and prefers a 5-day cruise within that timeframe.
- **Destination:** Where does the client want to go -or- what type of travel are they looking for? For example, maybe they don't know where they want to go but they want to go on a cruise. If they do have a specific destination in mind, be sure to also ask if there are any places they want to avoid. For example, maybe the client wants to go to Italy to visit Venice but had a bad experience in Florence a few years ago and wants to avoid that city. You'll know to be sure to avoid any packages that include Florence.
- **Requirements:** Do they have any specific activities or things they want to do in mind? You can help the client determine this based on their past vacation experiences they liked or didn't like when you asked your open-ended questions. Also, be sure to ask if there are any special needs or requirements they have. For example, they may have a child that requires wheelchair accessibility, or they might be a vegetarian. You will need to be sure any vendor or package you find for the client addresses these requirements.
- **Budget:** What is their budget? Many people are uncomfortable giving an exact number, so it's ok to ask for a price range.

### Traveler Information

1. Full legal name of every passenger (must match their government issued ID)
2. Date of birth for each traveler
3. Passport information (Date of issue, expiration, and passport number)

**Tip:** Do not pigeonhole your clients. Keep in mind that all clients are not the same. Don't assume someone does or does not have money to travel based on their appearance or the way they speak. Also, be sure not to sell from your pocketbook. Meaning, do not assume that your client does not want or can't afford a 5-star hotel because you cannot afford to stay in one.

### Listen

Effective listening requires effort. Be sure to shut out distractions, don't interrupt, take notes, keep an open mind, and pay attention to voice inflection and body language. The purpose of asking your questions is to get the answers you need to understand your client and their needs. Be sure you are listening effectively, and don't be afraid to ask follow up questions if you need clarification.

### Travelers with Disabilities

Nearly one-fifth of all Americans have some type of disability. It's important to know that thanks to The Americans with Disabilities Act of 1990, people with disabilities have the right to access the same services as those without disabilities in the US. Although not perfect, progress is being made to ensure accessibility for everyone. Agents should be careful not to stereotype travelers with disabilities. Be sure to work with each supplier in advance to see how your clients' needs can be accommodated.

If you are interested in additional training on selling travel to travelers with disabilities, we recommend the following trainings

- Become a Special Needs Group (SNG) Certified Accessible Travel Advocate through the [The SNG Travel Advisor/Agent Certification program](#). It's free, and the information and knowledge provided are priceless!
- Become A Certified Autism Travel Professional through [IBCCES](#) to offer support and travel-related services to an individual on the autism spectrum as well as their family.
- The Travel Institute also offers a training specifically for [accommodating travelers needs](#).
- Although not a training program, [Emerging Horizons](#) is a site that provides great travel news and information about accessibility for travelers.

## II. Preparing a Quote

The screenshot displays the Apple Vacations website interface for preparing a quote. It is divided into three main sections:

- Email Your Itinerary:** A form with fields for 'To:', 'From:' (pre-filled with 'travelinfo@myyourtravelagent.com'), 'Reply To:' (pre-filled with 'mlynn@appleg.net'), and 'Subject:' (pre-filled with 'Itinerary Notification'). A 'Print' button is located at the bottom right of this section.
- Quote Summary:** A table listing the components of the package price:

Days Prior to Departure	109
Base Package Price	\$ 0.00
Adult Base Price (2)	\$ 33.00
Options	\$ 2,241.32
Travel Protection	\$279.98
<b>Total Package Price*</b>	<b>USD \$ 2,521.30</b>
<b>Price Per Person</b>	<b>USD \$ 1,260.65</b>

Below the table, there is a 'Pay Monthly from' option for USD \$225/month. A note indicates '\* Included Taxes and Fees' and a link to 'Terms & Conditions'. Action buttons include 'Email/Print Itinerary', 'Create Sales Email', and 'Checkout'.
- Recent Searches:** A list of three itineraries:
  - Itinerary 3:** Apple Vacations, ATL - CUN, \$2,521.30, 12JUN20 - 18JUN20. Description: 'Now Sapphire Riviera Cancun Unlimited - Luxury'. Actions: Compare, Save, Delete, Duplicate.
  - Itinerary 2:** Apple Vacations, ATL - CUN, \$521.07, 12JUN20 - 18JUN20. Action: Compare.
  - Itinerary 1:** Apple Vacations, ORD - CUN, \$397.10, 12JUN20 - 18JUN20. Action: Compare.A 'Compare 0 of 3' button and a 'Save All' link are at the bottom.



### What is a quote?

A quote is an estimation of the total cost of travel. You should plan on giving yourself at least 1-3 days to research and prepare a quote for your client.

## Find a vendor

Now that you have gotten to know your client and have their information, you have all the information you need to begin your research. First, review our Travel by Destination document from your Vendor List under the Tools tab on your Xstream Agent Hub. Start with the preferred vendors first. Once you choose a vendor, look at your Vendor List for instructions on how to work with that vendor.

Your Vendor List is located under the Tools tab on your Xstream Agent Hub and is available to all agents who have completed the Xstream University training. This list will show you information on each vendor Xstream Travel partners with, and includes instructions on how to work with them. We'll go over your Vendor List in greater detail in a later lesson.

It's important to check your Vendor List before trying to work with a vendor because each vendor does quotes differently. Some you can call, and others you can only do online. Many vendors pay a higher commission rate to us if you book on their website instead of calling them to make the booking, so you should always use their agent booking website before calling them to book. Once booked, you may call them regarding the booking. If you need to use a vendor's website to prepare your quote, and do not already have login credentials, refer to your Vendor List for instructions on how to obtain login credentials with this vendor.

Each vendor also has different registration instructions as well, and lists the booking credentials you will need to use to work with them and receive commission for your bookings. Some vendors you will be able to register directly with, others you will need to submit a support ticket under the category Travel Vendor Access to receive login information to book on that vendor's site. For example, Carnival and Royal Caribbean are vendors you can register directly with by following the registration instructions on your Vendor List. However, Norwegian Cruise Lines is a vendor you will need to submit a support ticket for access. Please always refer to your Vendor List for instructions on how to work with each vendor.

Once you have login credentials for the vendor you will work with, be sure to review any training the vendor may have on booking and preparing quotes on their website. Many vendors have training you can find from the tool bar once you login. Look for tabs or drop-down menus with words like "training," "education," "resource center," "Agent tools," etc.

## Flights

Here are some special considerations when booking flights:

### Date/Time

- Be sure the dates match your client's departure and return dates. Time zones can be tricky to work with, so triple check AND have your client verify to be sure the dates are accurate.
- Be sure to give your clients plenty of time to catch their flights! Clients should arrive at the airport 2 hours before domestic travel, and 3 hours before international travel. Your clients can be denied boarding if they do not arrive on time. This means you will need to ensure they have appropriate transfers so they get to the airport on time.

## Connections/transfers

- Be sure to give families with children and people with mobility issues or disabilities more time to make any connecting flights. Direct flights are best if available.
- There must be at least 45 minutes between connecting flights to book. Consider if this is enough time for larger airports. If it is an international flight, they need to have a minimum of 2hrs between flights so that they can clear customs.
- Check the arrival times and allow time for customs, baggage claim, and transfers when determining when a client will arrive at their resort/hotel. For departures, be sure to give your clients plenty of time to make their flight. For example, some resorts are 1-3 hours away from the airport. Booking a 10am flight may not be wise because the client would have to leave the resort by 4 or 5am to make it to the airport on time.

## Flight for cruises

Most cruises have suggested times for flight arrivals and departures. Check with the cruise line before you or your clients book their flight. The client needs to board the ship a minimum of 90 minutes prior to sailing. Be sure to give enough time to transfer from the airport to the pier. Most cruise lines suggest booking departure flights after noon to give the client plenty of time to disembark and go through customs. It's always recommended to have your clients fly in the day before the cruise is supposed to sail. This alleviates the stress of worrying if their flight is delayed or worse, canceled. They will miss the ship and it is at their own expense to meet up with the ship at the next port of call. Trip cancellation insurance does NOT cover their non-refundable expenses if they were to miss their cruise for this reason.

## Cruises/Resorts

When choosing the right trip, you will need to take into consideration the information you gathered when qualifying the client. Where do they want to go, how many days, and what kinds of activities do they want to do? All of these will help you determine which vendor you should choose, as well as which ship/resort/destination/tour to recommend. Be sure you include any amenities the client desires as well as accommodates any special requirements they might have. For example, if the client is travelling with children don't choose a resort that's for adults only, and try to find something more suitable with a kid's club or children's activities.

**Tip:** You are not only a researcher, but also a designer! You design a client's customized experience. You research the options, edit the choices, and present recommendations that fit their lifestyle and budget. As travel agents, we put our global contacts to work for the client, so they receive perks, privileges, and VIP upgrades they wouldn't get on their own. This is a part of why people come to travel agents because we have developed relationships with our vendors, and we can sometimes get those upgrades and privileges.

## III. Presenting a Quote

Only present the client with 1-2 options (3 at most), and never start with the lowest price in the lowest price category. You need wiggle room if the client doesn't like the price and you need to come down. Even clients who say they want a "good deal," or the "best price," do not mean they want the cheapest

option available. Clients want value for their money, and what is considered valuable to each client will be subjective. Remember, you are the travel expert. They trust you to have narrowed it down to the best options for them. Don't just send them a number, explain why you chose the options you did based on what they told you when you qualified them. It will also help you to use visual aids whenever you can. Make the vacation tangible for the client.

Make sure the client understands price and availability are not guaranteed, and the quote is subject to change until the booking is held or payment is made. Some suppliers allow you to put the booking on hold for a small amount of time. This allows you to give your client more time to decide. Make sure you keep track with when the booking will be released (i.e. when you will lose the hold on the quote). Additionally, some sites will allow you to save a quote on their site. Beware: This does NOT mean a booking is held.

Most vendor's sites will generate a quote you can send to your client. You must ALWAYS quote the gross total price. Be sure to print or email yourself a copy as well. If you are preparing the quote yourself, you must add all costs including full fare, taxes and fees, baggage costs, and any additional charges (code share, auxiliary charges, hazardous materials fees, etc).

You will also offer Trip Travel Protection in your quote. We'll discuss more about this below under Policies and Procedures.

Follow up with your client after you present them with a quote to ensure they've received it and make an appointment on when to go over the information together.

**Important:** You must always quote the GROSS total. Paying to net forfeits your commission with the vendor and is grounds for termination.

## Policies and Procedures

It is imperative and mandatory to always give the client the supplier's cancellation policy. It should be included in the quote, in the booking confirmation, and your invoice receipt. The client will need to acknowledge that they received the cancellation policy when they sign the credit card authorization form, and when they sign the client acknowledgement form. This can prevent chargebacks!

## Trip Travel Protection

Trip Travel Protection is a package of benefits and services intended to protect the client's travel investment, their belongings, and most importantly, the client. There are three main reasons to sell trip travel protection. First, clients have a right to know this kind of insurance is available to them to protect their travel investment. Second, travel insurance protects the agent from liability in some instances should something go wrong. Lastly, trip travel protection is a commissionable service which boosts the agent's profits on the booking. It's important to note that the client does not need to purchase trip travel protection, but you must offer it. Regardless if the client purchases it or not, they must acknowledge that it was offered to them when they sign the credit card authorization form. This can also help prevent chargebacks.

There are 5 main travel protection types:

1. **Flight insurance:** Protects in case of accidents that occur in air or while on transportation.
2. **Accident and Health Insurance:** Protects in case of accidents or sickness while traveling. Much more common because most Medicare and private insurance policies in the states do not cover medical care abroad.
3. **Baggage and personal Possession Insurance:** Protects in the case of lost, stolen, or damaged baggage or personal items while traveling.
4. **Cancellation/Interruption Insurance:** These kinds of policies reimburse a traveler for nonrefundable payments in case of any reason outlined in the policy, and any portion of the trip plus costs to return home should they need to return home for any reason outlined in the policy.
5. **Coverage for Bankruptcies and Defaults by the Supplier**

It is the agent's job to offer the trip travel protection policy to the client and if the client has questions, provide them with a link to the insurance company's website as well as the insurance customer service line to help clarify the policy and rider types available. Please know, you do not need to explain the trip travel protection policy, you just need to offer it to the client with a link to the policy should the client have questions. We are travel agents and not insurance agents, it is up to the insurance company to define and explain their coverage, as you do not want to misinterpret the policy and make promises of claim payment.

To learn more information about the insurance vendors we work with, please click on the Travel Insurance tab on your Vendor List.

## IV. Making the sale

Now that you've presented a quote to your client, the last step of the sale is to "close," -or- have your client choose one of the quoted trips you've provided and give you their payment information so you can make the reservation. Because your client can't sample the product they're about to buy in the same way they can test a car or read a chapter in a book before they buy, it's important to make the vacation seem as tangible as possible for the client. This means using words that create a mental picture, give examples, and use visuals whenever you can. It's natural to feel apprehensive about the close but remember, it's travel. Everyone already wants to do it. You have the benefit of selling something that everybody wants already.

The following are steps in the sales process. Keep in mind that they don't always go in order. Sometimes you will find someone ready to buy immediately after you present your quote. Other times the situation may require you to overcome objections and offer additional recommendations. Each situation will be different, but these steps will help you.

## 5 Key Steps to Sales:

### Open

- Always be professional, polite, and have a great attitude. Even if you are talking over the phone, smile! You can hear the smile in someone's voice.

### Qualify

- These are closed-ended, open-ended, and lifestyle questions that we discussed earlier in this lesson. This information helps you get a quote for the vacation the client wants and needs.
- Be sure to develop a rapport with the client. Show that you care about their feelings and ideas.

### Recommend

- This is a part of presenting the quote to the client. Only ever present 1-2 options to your client, 3 at most. Don't focus on the price. You want to sell the value of the trip which focuses on the experience. This also means selling benefits, not features. A feature is what something is, and a benefit is what it does. A feature is a fact. A benefit is the emotional payoff. For example, a feature is a balcony stateroom. The benefit is a romantic, private area. A feature is a fast ship. The benefit is a ship that visits more ports. You're still giving them the same information, but you're making it much more appealing by giving it an emotional connection.
- Selling up: If upgrades are available, let your client know! For example, if they are already paying \$3,000 for a cruise, but only an additional \$200 would get them a better location on the ship or an upgraded cabin, let the client know! They may be disappointed to find out later that they missed an opportunity.
- Cross-selling: Remember, clients want the best value for their trip. They may not realize they will need a rental car when they get to their destination, or they want to see a musical or show. They may not know you can handle these arrangements, and if they make these arrangements on their own, it will mean a lost opportunity for additional commission for you and possible higher rates for the client.

### Overcome Barriers

- This is also a part of presenting the quote to the client. Be prepared to address any questions or concerns the client has. You need to handle their resistance, don't run from it or become defensive. If they don't like the price because they think the package is too expensive, look at other room categories, downgrading the room or hotel option, or suggest a shorter length of stay. Sometimes the travel dates don't work, or the client prefers a different destination. You may need to requalify the client to ensure you have the correct dates and understand their desires better.
- If the client appears to like everything you've said and has no objections but just doesn't want to commit, their objection is probably price. Make one of the suggestions given above and judge if they respond positively or negatively to your recommendations to determine how to proceed with the close or if you need to requalify the client.



- If your clients ask for any changes to their vacation package, write it down! Don't assume you will remember what they said or asked for later.

Close: This is the last part of presenting the quote.

- Don't be afraid to ask for the money. You can simply say, "All right. Which method of payment would you like to use?" Or "Which card would you like to charge this to?" At this point you've already sold them on the trip, so don't lose the opportunity by being too timid to close the sale. Another way to ask outright is to offer to make the booking. Simply say, "Would you like me to make your reservation?" Then ask which payment method they will use.
- Another way to close the sale is to put the client on the clock. Stress that price and availability are not guaranteed, and the quote is subject to change until the booking is held or payment is made. This may give them the motivation they need to agree to the sale before the price changes.
- Look for closing signals. This can be excited speech, high volume of questions, they're agreeing with everything you're saying, they're visualizing being there on the trip, etc. All these signs show that they are ready to buy, so this is when you will ask to make the reservation or the payment method.
- Tell your client if a vendor offers payments or deposits. Some vendors will allow a deposit by a certain date, others expect full payment. Keep in mind some vendors offer payment plans, but please never promise a payment plan to a client. It is up to the vendor if they offer a payment plan or not.

**Important:** You must always quote the GROSS total. Paying to net forfeits your commission with the vendor and is grounds for termination.

### What NOT to say

What you don't say to your clients is also a very important part of the sales process. Never lie or exaggerate. If a client asks you a question about the views from a hotel you know nothing about, don't tell them it has the best views in the city just to make the sale. Contact the supplier for photos or additional information you can give to your client. Say, "I don't know, but let me find out."

Additionally, never guarantee your client's enjoyment or guarantee something outside of your control. An example would be to guarantee the weather will be beautiful or that they will love their trip just because you had another client love it when they went. Lastly, do not pressure your client or manipulate them into the sale. Avoiding these things will reduce the possibility of disappointment and potential chargebacks.

Always end your sale on a positive note and thank the client for their time. You should always give the client your business card and set up a meeting for the next steps. For example, schedule a follow up call for when their next payment is due.

## V. Making the Reservation

## Credit Card Authorization Form

After your client chooses one of the quoted trips you've provided, have the client fill out a Credit Card Authorization Form. This form is located on your Agent Hub under the Resources Center tab. **This form is required, no exceptions.** It not only protects you from credit card chargebacks and authorizes you to use the client's credit card to pay for their vacation, by filling in and signing this form the client affirms that they have read and understand the cancellation policies and indicates that the client either accepts or denies trip travel protection. This form must be filled out completely and physically signed.

### Credit Card Authorization/Trip Acknowledgement Form

Booking/Confirmation #: \_\_\_\_\_

By signing this form, you give (vendor) \_\_\_\_\_ permission to debit your credit/debit card account for the amount of \$ \_\_\_\_\_ on or after the indicated date. Your signature is required to complete your travel plans. Please read the cancellation/change penalties that may apply to changes or cancellations of your travel.

#### BILLING INFO

Cardholder Full Name: \_\_\_\_\_  
Billing Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Cell Number: \_\_\_\_\_ Work Number: \_\_\_\_\_  
Last 4 Digits of Credit Card Number: \_\_\_\_\_ [ ] Visa [ ] MasterCard [ ] Discover [ ] American Express

#### PASSENGER INFO

#1 Full Legal Name: \_\_\_\_\_ #1 DOB: \_\_\_\_\_  
#2 Full Legal Name: \_\_\_\_\_ #2 DOB: \_\_\_\_\_  
#3 Full Legal Name: \_\_\_\_\_ #3 DOB: \_\_\_\_\_  
#4 Full Legal Name: \_\_\_\_\_ #4 DOB: \_\_\_\_\_

- ◇ You have verified that all names are spelled correctly and that they are your legal names as listed on their Government issued ID (Passport/Drivers License).
- ◇ It is strongly recommended to purchase travel insurance. If you choose not to purchase travel or cancellation insurance, you understand you are liable for any cancellation penalties and out-of-pocket expenses incurred. You will also make your own provisions in the event of an emergency while traveling. **I understand the Trip Travel Ins premium is non-refundable.**
  - I hereby accept travel insurance coverage. I understand the trip cancellations and interruption details, terms and conditions that were provided or discussed with me.
  - I hereby decline travel insurance coverage. I understand the trip cancellation and interruption details, terms and conditions that were provided or discussed with me. I acknowledge that all the information above is correct.
- ◇ I hereby verify that I have reviewed my travel itinerary for accuracy. Dates, flights, etc. I have been advised of all applicable fees imposed by my agent and the suppliers as well as any scheduled fees that may be required if this

Sometimes a client will add onto their vacation, or something changes even after they've filled out a credit card authorization form. For example, they add an excursion to a cruise or add a guided tour to their vacation package. In this situation you can either have them fill out a separate credit card authorization form to authorize the new charge, or they can send you something in writing that says they are giving you permission to charge their card again, the amount, and what it's for. It can be something as short as, "My travel agent Joan Smith has my permission to charge my card ending in these four digits, this amount on this day, for this reason," and it must signed and dated by the card holder with their email address at the bottom.

**Tip:** Getting a physically signed Credit Card Authorization Form for each trip is for legal and liability reasons. We recommend keeping a client's Credit Card Authorization Form in your records for at least 12 months after the date of travel in case of any credit card chargebacks or disputes. Remember, if you do not collect a Credit Card Authorization Form from your client and the charge is disputed, you are responsible for these charges as the person who took the credit card information.

## Deposits and Payment Schedules

As a travel agent it is your responsibility to keep track of all payment due dates and communicate these dates to your client. These are all on the vendor's timeline. You do not have control over when payments are due. If you do not make these payments by the dates the vendor assigns, your trip will be automatically cancelled by the vendor, so it's a good idea to keep an accurate calendar and set up a reminder to reach out to your client in advance of when a payment is due. Keep in mind, when a trip auto-cancels you could lose the deposit and any money paid so far on the trip. You should always tell your clients that the final payment due date is a minimum of 2 weeks prior to when the vendor actually set the final payment due date. This gives you time to contact the client and gives them time in case they need to wait until their next payroll date.

If you are going to be out of town for a couple of days or longer, let your clients know and take care of any payments before you leave. If you have a group booking, make sure you contact everyone in the group and give them your contact information. They need to know who to contact to make payments or make changes to their booking.

## Submitting a Payment

The only payment methods you may accept as an independent agent with Xstream Travel are Credit and Debit cards. **No exceptions.** This is for legal and liability reasons to protect both you and the client. Once you get your client's Credit Card Authorization Form, make their payment immediately with the vendor. Remember, availability and price are not guaranteed until payment is made. If you wait a week the reservation may become unavailable, or the price may change.

After the booking has been confirmed with the vendor, immediately place your booking on your Booking Desk on your Xstream Agent Hub. We will discuss your Booking Desk in greater detail in a later lesson. This includes group bookings that do not have a deposit on them yet. This ensures you will not only receive your commission after your client travels, but also ensures you receive communications from the vendor like air schedule changes, resort or itinerary changes, etc. that you will need to pass on to the client. Sometimes the vendor may call us looking to talk to you and if they only have your first name we would be unable to locate you. If you have your booking posted on your Booking Desk we can look it up by the booking confirmation number.

**Helpful tip:** Most vendors offer webinars and free online training tools on their website. These tools will help you not only get a quote, but also may answer questions on how to make a payment. You may also call the vendor for assistance if you have additional questions. Keep in mind, some vendors reward you with higher commission by using their website instead of calling in and booking over the phone. So, it's in your best interest to read your Vendor List.

**Remember:** You must always pay the GROSS total. Paying net forfeits your commission with the vendor and is grounds for termination. This applies even if the vendor's system only requires the net payment.

You must pay to gross. Paying to net forfeits your commission with the vendor.

### Avoid Common Mistakes

- Double check the airport codes and cities are correct. Don't accidentally send your client to Paris, Texas when you meant to book to Paris, France. Additionally, make sure you are routing your client out of the same city. Don't accidentally book your client to arrive in Norfolk VA and catch a connecting flight out of Richmond VA which is in a different city over an hour away.
- Double check your dates. Make sure your hotel or car reservations are made for the correct days, keeping in mind any time changes. If the client leaves for Japan on December 1<sup>st</sup>, they may need their hotel reservation for December 2<sup>nd</sup> due to the time change.
- You must tell the client if any travel documents are necessary. Never assume the client knows if they need a passport or visa for their trip (See next Lesson- Travel Documents).

## VI. Travel Documents

What are travel documents? A travel document is anything that a supplier requires that allows you to travel or attend activities, or government issued identification documents necessary to enter the country of destination. They can be tickets, vouchers, itineraries, passports, visas, etc. Most supplier travel documents are sent via email, but some are received via postal mail. Make sure that the documents are mailed to you. If your client's travel documents are sent to Xstream's corporate office, any mailing costs accrued to send the documents to you will be deducted from your commission. It's important to make sure you tell vendors to send any travel documents to you at your personal address.

### Double check then triple check!

It's an agent's responsibility to look over travel documents for your clients carefully before presenting them to the client. This way you can be familiar with them, and you can be ready for any questions that your clients might have. If you have questions yourself, you can call the supplier and get clarification first before you give the travel documents to your clients. Once you give the documents to your clients, ask them to review the documents and reply to you within 24 hours to confirm everything is correct. Be sure to keep a copy for yourself before giving the documents to your clients so you can answer their questions properly. Be sure to point out the emergency contact phone numbers as listed on the documents. There may be vouchers included that the client needs to give to the hotel, transfer company or for a tour activity.

Make sure you double check all the travel documents for any errors. This includes:

- Check the spelling of each traveler's name as it appears on their government issued ID, passport, visa, etc. Never assume the last name of a client. This includes married couples and children. It's not a guarantee that married couples share the same last name, or that a child has the same last name as one or both of their parents. The child may have retained a last name from a previous marriage. Always ask.
- Passport number
- Dates of travel
- Resort/hotel name or cabin type
- Flight schedule
- Give a copy of the cancellation policy and any trip travel protection documents to the client.

**Tip:** Stay organized! Keep a folder on your clients, and keep copies of all documents including any notes, authorization forms, travel docs, etc. Staying organized will help your business run more smoothly and efficiently. Take advantage of the CRM tool that is included when you join Xstream Travel Host Agency.

## Additional Documents

It is your responsibility as a travel agent to make sure your client knows about any government identification documents necessary for travel. This could be a passport, visa, driver's license, etc. When flying domestically within the US, TSA requires all adults (individuals over the age of 18) to have government issued identification. The following forms of ID are acceptable. U.S. passport, passport card, military ID, state issued driver's license, Department of Homeland Security trusted traveler card, border crossing card or Native American tribal photo ID. If flying internationally, please visit the State Department's Bureau of Consular Affairs website at [www.travel.state.gov](http://www.travel.state.gov) for more information about government issued identification requirements for travel.

### Passport

A passport is a document issued by a government that establishes an individual's identity and nationality of that country and requests protection for the citizen while abroad. Some good information to keep in mind is children's passports are valid for 5yrs, and adult passports are valid 10yrs. Additionally, **passports must be valid for a minimum of 6 months beyond the travel date.**

Please visit [www.travel.state.gov](http://www.travel.state.gov) for information on where a client can apply, fees, special rules for minors, first-time passports versus renewals, among other information.

### Visa

Where a passport is required to travel abroad and is issued by the country of one's citizenship, a visa is issued by the country of the destination and allows the individual to enter that country. Some destinations require a visa in addition to a passport. You can use [www.travel.state.gov](http://www.travel.state.gov) to verify if a visa is required. Neither travel agents nor Xstream Travel issue or take the applications for travel visas. You will need to direct your client to a service in their city by doing a Google search -or- if booked as a package with a vendor, they will give you a link to give to your client to handle the visa.

## Customs Regulations

Every country in the world restricts the items that can be brought across its borders and assesses a charge called a “duty,” on items whose value exceeds a certain allowance. Anything taken from home can be brought back duty free. However, the traveler may have to prove that some items were bought in the U.S. with a bill of sale. These are generally foreign high-priced items. The traveler can bring with them the bill of sale or register the item with U.S Customs before departure. Be sure to have your client read about customs regulations on the U.S Customs Service website at <https://www.cbp.gov/>.

## Health Concerns and Vaccinations

No one can guarantee that a client will have a safe and healthy trip, but there are many ways that travel agents can help their clients avoid unnecessary problems and be prepared for unavoidable difficulties. The U.S. Department of State has information about serious disease outbreaks, natural disasters, and political conditions that you can review for your client’s destination. Usually, vaccinations are not required for direct travel from the U.S. to other countries, but some nations do require visitors to present documentation stating that they have received a specific vaccination or that they are free of HIV, the AIDS virus, or a Corona virus. The Bureau of Consular Affairs at the U.S. State Department [www.travel.state.gov](http://www.travel.state.gov) can provide the current requirements of various countries. Additionally, information about immunizations is available through the Center for Disease Control and Prevention (CDC) <https://www.cdc.gov/>.

If your client has any healthcare questions or concerns, before departure they should check with their insurance carrier to determine whether their health care policy covers travel related medical expenses, and then decide if they should purchase additional coverage. The Health Insurance Association of America offers information about travel insurance.

## VII. Post-Sale/Travel Counseling

Now that you’ve made the booking your job isn’t over. Even though the sale is made, you must work to keep it made. You need to be available to your clients should they have any changes, cancellations, or questions, and deal with any complications that may arise before or during travel. If they contact you, respond promptly even if it is to tell them you will follow up with them at a later time. If you have a group booking, make sure everyone in the group has your contact information.

### Dealing with Changes

Changes or cancellations happen. Whether the client needs to add arrangements to their trip, exchange one aspect for another, or cancel, as a travel agent it is your responsibility to handle these changes quickly and efficiently. Be sure to determine the reasons for the change and that it’s in the client’s best interest. For example, if the date needs to be changed, never cancel an existing reservation before the alternative has been confirmed. The new date may not be available.

### Predeparture

Remind your client that they can check in for their flight 24 hours prior to departure. Use that time to ask them if they have any last-minute questions before they begin their trip, and be sure they have your contact information, as well as all their travel documents and any identification they need for their trip (Don’t leave that passport behind!).

**Helpful tip:** For a helpful and personal touch, consider giving your client information on exchange rates, power adapters and converters, any local customs they should be aware of, or restaurant recommendations. This information not only prepares your client for travel, but it also enhances their travel experience and builds trust between you and the client. Personal touches like these can lead to repeat clients.

## Research

Suppose that after making your client's booking they ask you questions about weather, entertainment, restaurants, safety, etc. You can easily find the answers to your client's questions online! Here are some good sources to be aware of:

- Government sites: National tourist offices, countries, states, provinces, cities, and many other government branches have websites. These are often the most authoritative and trustworthy sites available.
- Travel Industry Associations: ASTA, TIA, ARC, CLIA, Etc. There are organizations for nearly every segment of travel, and they offer information on both industry and travel destinations.
- Printed Publications: These are hotel guides, travel reports, etc. The information from these is also generally available online.
- Suppliers/Vendors: Although the point of these sites is to sell, they are often easier to use than noncommercial sites and publish information that may not be easily found elsewhere.
- Blogs: These days travelers will post their pictures and personal experiences while traveling online on personal blogs. Where their opinion is biased to their personal tastes, they can be full of firsthand experiences and information that can be useful to your client.

## Effective Research

The internet is an invaluable tool at your disposal. To use it effectively you first need to know how to use search engines. It's not about finding any result; it's about finding the best results. First, search using a succinct phrase or subject keywords. Keep in mind, being too broad will give you too general a result. For example, "Restaurants in Alaska," will bring up hundreds of results. Instead search, "top rated steakhouse in Anchorage Alaska."

Some search engines also use the (+) and (-) symbols instead of "and" or "not". Use "and" or + when you want to retrieve sources that contain both terms you are using. Use "not," or – when you want to exclude sources that contain that specific term. For example, "Restaurants in Anchorage Alaska, -cafe," would mean your results would give you a list of restaurants in Anchorage but would not include cafes.

In addition to effective searches, you also need to think critically about the reliability of information. Some tips to keep in mind are to see who's sponsoring the site, check when the information was last updated, and always go to an official source first when you can.

## VIII. Dealing with complications

### Potential Issues and How to Handle Them

If the client experiences any flight delays or cancellations they should speak to the airline first, and then call the vendor's emergency 24hr phone number listed in their travel documents. The airline's Service Desk will be in a better position to help the client immediately. If they have additional issues, they can call you for assistance. If your client is doing a tour package, be sure to contact the tour operator to let them know about your client's delay so they can rearrange any transfers for your client's new arrival time.

For any issues that happen on a ship or on a property, clients should be encouraged to seek assistance from the front desk or guest services first. These offices are there to help travelers and are the first step in solving any issue or problem during your client's stay.

If your client returns from their trip and feels an issue or problem was not resolved in a satisfactory way, it's time to step in and contact the After Travel or Customer Care Department for the vendor that you booked with. Get everything in writing from the client.

**Tip:** Contacts and the ability to call upon them to make things happen, especially when you're dealing with on-location emergencies, can make us all look amazing. Constantly proving to your clients that your relationships, and Xstream Travel's relationships, with the top hotels and companies will benefit them during their travels. Join professional and networking organizations and build your contact list.

## IX. Follow Up

Once your client returns from their trip you should contact them to welcome them home and ask how their trip went. This gives you valuable feedback on the destination, on your client's satisfaction with your services, and builds a relationship with that client to ensure future business. Send an email or give them a call a week or so after they return to give them enough time to settle in from their trip. If you have followed them on social media, be sure to like or comment on their vacation photos.

**Helpful tip:** A nice gesture is always appreciated! Send a card to your client when they leave so they will see it once they return home.



# Accessible Travel

Although the travel industry has a long way to go to improve their services to travelers with disabilities, helping your clients research and plan can make their vacation as stress-free as possible. Here is some useful information about accessibility options when helping your clients plan their vacation.

## Cruising

All cruise ships that sail in U.S. waters must comply with the Americans with Disabilities Act (ADA), meaning they must offer equal access for people who travel on cruise ships. Even cruise ships that are foreign-flagged, meaning they don't originate from the U.S., must be ADA-compliant if they sail through U.S. waters. Many cruise lines have accessible staterooms on their ships, meaning the dimensions and amenities in the rooms are specially designed to accommodate passengers with limited or no mobility, who are deaf or hard of hearing, or have visual disabilities. Additionally, most cruise lines have braille signage and elevator buttons and offer familiarization tours of the vessels if requested.

It's important to note that while many cruise lines welcome service dogs onboard, most will not allow companion animals, emotional support animals or therapy animals. Your clients will need to bring documentation of their service dog's vaccination records.

## Air Travel

When booking airfare for your client, it's important to understand their needs before booking. You can call the airline to see if they are able to accommodate your client, and be sure to give the client plenty of time between flights and layovers to have enough time to comfortably make it to their next gate.

Be aware of, and provide, the [TSA's rules](#) for travelers with disabilities and medical conditions to your clients as well. You can [request assistance from TSA through the TSA Cares](#) program online, or call (855) 787-2227 if your client's flight is within 72 hours. This program provides assistance to travelers with disabilities at airports. See also the [U.S. Department of Transportation's Disability Resource Center](#). For clients with sensory issues, you can look into the airport to see if they have "sensory rooms." These are places for people to take refuge from sensory overload and decompress from the stressful atmosphere at the airport.

## Ground Transportation

When adding airport transfers, look for options that say "limited mobility," or "wheelchair accessible," depending on the option your client needs. You will want to review the dimensions of the client's wheelchair or scooter and weight to determine if the transfer will work for them or not. Be sure to communicate with your client to determine their needs.

## Accommodations

Contact the resort ahead of time to ask about the availability of accessible room options. Some resorts have a limited number of wheelchair accessible rooms, so book in advance to ensure your client receives the room option they require. If the hotel/resort is in the US, ask if the rooms meet the ADA (Americans with Disabilities Act) requirements. If yes, ask what specific modifications have been made to the room.

## How to Plan your client's trip

As a travel advisor, one of your goals is to create seamless experiences for your clients. From the start of the planning process to the arrival back home after the trip, you want your client's vacation to be effortless.

### Ask the right questions

Don't be afraid to ask your clients what they need. This can be as simple as asking, "Is there anything I can help you with that will make this trip more comfortable or accessible?" Or "Are there any requirements or needs you have that are non-negotiable?" It's important you do not make assumptions about your client's preferences or what they may be comfortable doing based on your understanding of their disability or limitations. Everyone's needs and preferences are different.

### Choose the right vendors

Xstream partners with dozens of vendors that offer accessible options for travelers with disabilities. Here are some options:

- **Sandals:** [Sandals](#) provides all-inclusive luxury Caribbean vacations for everyone, including people with disabilities. They offer accessible rooms options, wheelchair accessible ramps and wider clearance on doorways, bathroom rails, lowered light switches and faucets, bathroom benches and more. They also have an experienced staff member on hand to ensure your clients' needs will be met.
- **Beaches:** Beaches offers a special certification course in becoming a certified autism travel professional. This course will increase your clientele by gaining knowledge and access to a brand-new customer base with comprehensive training in autism-related travel. More information about their CATP course is [here](#). They also have Autism-friendly kid camps to offer families with children with autism and other special needs specialized service, engaging activities and custom dining options so that all families may enjoy a memorable, award-winning Beaches Luxury Included experience. Learn more [here](#).
- **Scootaround:** The nation's leading personal transportation solutions company, offering rental, sales, and repair services for scooters, wheelchairs, powerchairs, and rollators at over 2,500 locations worldwide. Check them out on your Vendor List for instructions on how to book. They also offer [travel mobility guides](#) with great information on how to help your client's trip be more accessible.
- **Disney:** [Disney Parks](#) and [Disney World Resorts](#) have an unwavering commitment to providing a welcoming, inclusive environment and accessible experiences for their Guests. This includes options for people with cognitive, hearing, light sensitivity and mobility disabilities. They offer many options to these guests including mobility aids and conveyance vehicle rentals, restroom and companion restrooms, a welcoming policy for service animals, services and devices for

guests with visual disabilities, guides, health care services provided by [AdventHealth](#), and much more. As part of this commitment, Disability Access Service (DAS) is a program offered at Walt Disney World theme parks to assist Guests who have difficulty tolerating extended waits in a conventional queue environment due to a disability. They also have a department dedicated to assisting guests with disabilities and can be contacted at Disability Services at (407) 560-2547 or email [disability.services@disneyparks.com](mailto:disability.services@disneyparks.com).

- **Vax:** Vax has many [articles](#) with invaluable insights on how to book air, transportation, obtain room amenities, and more when booking clients with accessibility needs. They also offer [many hotel options](#) to make travel accessible for everyone.
- **Royal Caribbean:** [RCCL](#) offers multiple options from accessible staterooms, accessible shore excursions, additional onboard and offboard assistance, options for guests with autism and developmental disabilities, visual and hearing disabilities, and welcomes service animals. They do require advance notice to accommodate requests. Please submit the [Guest Special Needs Form](#) at time of booking but no later than 30 days prior to sailing, except for sign language interpreting requests which must be submitted 60 days prior to sailing. This will allow them to make the necessary arrangements for your requested accommodations.
- **Carnival:** has made substantial modifications to their ships, to help make them easier to navigate. The ships feature accessible elevators at each elevator bank, equipped with both tactile controls within reach of guests who use wheelchairs and audible signals for guests who are blind or have limited vision. Accessible routes are available throughout most areas of the ship and signs are posted to assist you in locating these pathways. Accessible tables are available in the dining venues of each ship. In addition to the main dining rooms, each ship offers a variety of accessible dining options within Lido Deck casual dining areas and other restaurant venues. 24-hour room service is also available for all guests. Pool lifts are only available on Carnival Horizon, Carnival Panorama, Carnival Radiance, Carnival Sunrise, Carnival Vista, and Mardi Gras, all of which have a 300-pound weight limit. For each ship, diagrams of accessible routes, accessible staterooms, and accessible public restrooms are [available](#).
- **Norwegian:** Norwegian Cruise Line is committed to providing inclusivity and access to world-class vacation experiences by continuously improving and applying the most updated accessibility standards to exceed guests' expectations. Assistance is available for guests with mobility needs for on ship rentals, deaf or low hearing room options including visual-tactile alert systems and personal pagers, Braille / tactile signage as well as a vessel orientation tour for blind and low vision guests, and more. Service animals are allowed onboard and must be arranged through the Access Desk prior to the cruise. They also provide Accessibility Coordinators before travel and require a [Guest Special Needs Request](#) at least 90 days for interpreters and 45 days for all other requirements. Onboard, the Norwegian Cruise Line Access Officer will be the primary person managing all of your client's needs.

You're not limited to these vendors! Check with any vendor you plan to work with about their accessibility options. Make sure you look for the accessibility options necessary for your client, and

communicate your client's needs with the vendor when booking to select the correct accommodations, transfers, rentals, etc., based on your client's specific needs.

#### During their trip

If you booked a specific room category or mobility rental, make sure your client has a copy of all confirmations. Be sure to provide your client with any contact information for accessibility departments or contacts that are available to assist them with their needs while at their destination.

#### Additional Resources:

- For people with autism and other IDD's, please look into [The Arc Wings for Autism/Wings for all Program](#). The Arc's Wings for Autism/Wings for All program gives families and aviation professionals the confidence to take to the skies with ease by providing an airport "rehearsal," as well as a presentation on the aircraft features and in-flight safety protocols. Please check their site for webinars and resources.
- [Emerging Horizons](#) is a site that provides great travel news and information about accessibility for travelers.
- Become a Special Needs Group (SNG) Certified Accessible Travel Advocate. [The SNG Travel Advisor/Agent Certification program](#) is FREE; the information and knowledge provided are priceless!
- Become A Certified Autism Travel Professional through [IBCCES](#) to offer support and travel-related services to an individual on the autism spectrum as well as their family.
- The Travel Institute offers training specifically for [accommodating travelers needs](#).

# Travel Agent Responsibilities

The travel agent's responsibility goes beyond the quote and applying payment. There are several steps an agent must take to ensure they're complying and meeting legal requirements. Travel agents are responsible for providing information to the client, examining and verifying all information, and ensuring that the client understands all the policies, fees and requirements to which they are subject to for travel.

## Credit Card Authorization Form

You will need to adopt using a Credit Card Authorization Form (CCAuth Form) into your workflow for every booking. The CCAuth Form documents the client's agreement and acknowledgement that the agent was authorized to charge the client's credit card, and has made the client aware of specific items regarding the reservation including terms and conditions, cancellation policy, and has offered travel/trip insurance. Their acknowledgement and verification on this document will support you in the event of a client filing a charge back or other action demanding repayment of fees or wanting compensation for the errors.

## Invoices and Receipts

Every transaction you make with a client should be recorded and noted, especially when payments are made. You can choose to use the invoice/receipt from the supplier, you can create your own invoice in your Xstream CRM, or you may use outside services like [jotform](#). When dealing with multiple suppliers, like a tour operator, travel insurance and excursions, you may want to consolidate all the payments and charges on one invoice for the client. When using your own invoices, you need to ensure you are documenting the same information the supplier has recorded to avoid any confusion or misinformation. Any errors recorded on your invoice that aren't reflected by the supplier can be costly as the client is using your invoice for their payment records.

## Verification

Have your clients verify the spelling of their legal names, birth dates, travel dates and travel itinerary immediately after you book. You may only have a very small window of opportunity to correct any errors. This can assist you if your client says:

- Their names are wrong which incurs a name change fee
- Their dates are wrong which incurs a change fee
- Their itinerary is wrong
- Their accommodations are wrong

When asking your clients to verify information, remember to apply a deadline of when the acknowledgement is due. Keep in mind that some supplier verifications, such as airlines, must be corrected within a short time frame (Usually within 24hrs). If you are doing this via email, you may want to place a read receipt or a received receipt on the email to verify the client did receive and read the email in a timely manner. You may also follow up with a phone call to be sure that the client received the info and request they acknowledge everything is correct in writing.

## Terms and Conditions

Your clients need to be informed of all terms and conditions. This includes but is not limited to:

- Tour Operator Terms and Conditions
- Airline Terms and Conditions

- Agent Specific Terms and Conditions
- Payment Schedule
- Cancellation Policy
- Additional Fees

### Errors & Omissions Insurance

Errors & Omissions Insurance protects travel agents from losses caused by negligent acts, rendering or failing to render services.

Professional Liability Insurance Protection, commonly referred to as “Errors & Omissions,” or E&O, has become a necessity for all prudent travel professionals. As an individual retail travel agent or independent contractor (IC) salesperson, there is an element of intrinsic risk in your work that may best be addressed by a quality professional liability insurance policy in your own name, to protect your interests.

### Travel Insurance

All clients must be offered travel insurance to protect their travel investment. Take note that we are using the term **offered** and not **sell**. As a travel agent, it is your duty to ensure the client is aware of the benefits travel protection can provide them in the event something happens before and during travel. Most travelers have a misconception that travel insurance is only used to cover illness while on vacation. As a travel professional, you need to inform your clients of all the benefits travel protection includes.

When you offer your clients protection, there are several things you need to be aware of: You are a travel agent, not an insurance agent. You must use the term “offer.” As a travel agent, you are not a licensed insurance agent, nor do you work for or represent the travel insurance companies. You can suggest and offer policies to your clients, but it is in your best interest to not actively sell the policy. This means you should not interpret the policy for the client. If you give misinformation or do not understand the travel policy in its entirety, the client can hold you accountable for the policy you sold them.

**EXAMPLE:** You inform a client if they choose this policy, it covers them should they cancel for any reason, but the policy has a disclaimer you did not see which states it does not cover hurricanes. Prior to the client’s departure, a hurricane warning is issued, and your clients want to cancel. The client calls to cancel and is told their policy does not cover hurricanes and at this point the resort area and airlines are not ceasing service to the affected area. Your client’s claim is denied, and no reimbursement is being offered by the airline or resort. The client holds you responsible for selling them an insurance policy that didn’t cover them when you said it would.

To avoid a situation like that, always give your clients the full policy for them to read and review. If the client wants clarification or more information on the policy, they should be referred to the insurance company directly. The travel insurance representative will explain the policy to the client and ensure you are credited with the sale.

Once the client is informed, offered travel protection, and has decided, you must obtain their acknowledgment of accepting travel protection or declining to purchase travel protection. They must initial on the Credit Card Authorization Form to either confirm they have accepted travel insurance or declined travel insurance. The CCauth Form will satisfy the requirement of offering travel protection to all clients. The CCauth Form can be used in the event a client makes a charge back saying they were not offered travel insurance, or were not aware the insurance premium was non-refundable.

**Note:** In 2012, DOT enacted the Opt-Out Prohibition, 14 CFR 399.84(c), which makes it a finable offence to automatically include any ancillary services. Ancillary services are optional products and services, such as travel insurance, transfers or excursions added in connection with air transportation or a tour/cruise package that contains an air component. In other words, optional products and services may not be added by default whereby the consumer must optout or deselect them. It is, however, acceptable to offer optional products and services in a way that requires the consumer to affirmatively select or acknowledge them by checking a box or signing their signature, like on our CCAuth form, for example.

## Agent Checklist/Workflow

To ensure each client is properly taken care of, agents should adopt a standard booking checklist –or– workflow, to ensure a consistent process is made with each client.

A sample workflow looks like this:

- **Qualify:** Schedule a meeting to ask your client specific questions that help you understand their personality, desires, budget, and their needs and requirements for travel. Add all the information gathered from your client into your CRM or another database. Consider drafting a sample list of questions that you can keep as a template to go through for each client.
- **Research:** Research trip options based on the client’s budget, travel preferences, and accessibility requirements. This also includes looking into travel requirements and documents the client may need like visas, vaccinations, etc.
- **Quote:** Provide a quote for the price of the services you’ve researched and go over what the package includes. Review booking terms and conditions, cancellation policy, travel requirements, and offer trip protection/travel insurance to the client.
- **CCAuthform:** This form needs to be physically signed by the card holder and returned before any payment is made. Should be kept in a secure and locked location for at least a year after the date of travel. Once the form is received, collect the payment information from the client.
- **Apply payment:** Apply the payment immediately after it’s received from the client. Give the client a copy of their receipts/confirmation, itinerary documents, terms and conditions, trip protection/insurance policy, and a copy of the cancellation policy. Have the client review and acknowledge the confirmation details are correct. Give the client a 24hr deadline to follow-up with you to let you know if any changes need to be made. Set reminders on your phone or calendar for any additional or final payments at least 2 weeks in advance before the payment is due.
- **Pre-departure correspondence:** See if your client has any last-minute questions before they travel. Make sure there haven't been any major changes with the client, and they are prepared for their trip. Here is where you can provide additional tips that add value to your services. Here are just some suggestions:
  - ◆ Remind your client to put a hold on their mail at USPS if they’ll be gone for a week or longer. USPS will hold their mail and packages safely at the Post Office for them to pick up when they return.

- ◆ Remind your client to reach out to their CC company to notify them of their dates of travel and destination. This will ensure their credit card purchases are not flagged as fraud or credit account frozen while they're on their trip.
  - ◆ Most vendors provide packing lists or check lists you can send to your client. If they don't, a quick google search about the destination and time of year can bring up sample packing lists. Remind the client to check for all travel documents including vouchers and passports before they leave their house.
  - ◆ Recommend or provide tags for your client's luggage. They could also look into electronic tags that track luggage should it become lost. Suggest the client take a picture of their belongings in case they need to itemize lost items on insurance claims.
  - ◆ Send the client a quick text or call to remind them to check-in to their flights. Remind them to arrive at the airport early enough to take care of any checked luggage and have plenty of time to make it through security.
  - ◆ You should also provide contact information for you, the supplier, the travel insurance provider, and the US embassy (if travelling outside the US) in case the client has any issues while traveling. You should also make sure you will be reasonably available during your client's trip in case of any emergencies.
- **Post travel follow-up:** Follow up with your client! See how the trip went and thank the client for their business! Gain feedback about the supplier, the destination, and your services. Be sure to note any feedback into your CRM or other database. This makes sure you remember all their experiences and preferences for their next trip. You could also set a reminder to follow up with the client in 6 months-1 year if you haven't heard from them, to let them know you're excited to help them plan their next vacation!



## How to minimize the risk of fraud

Sometimes we're too eager to make a sale and miss some common signs that something just isn't right. As more and more people start to travel, it's important to notice the signs of fraud and how to minimize the risk of fraudulent bookings. It's also important to know the best way to fight a chargeback is to prevent them.

### Chargebacks

A chargeback is a transaction reversal initiated by a credit card holder. It's offered to cardholders by a cardholder's bank or financial institution as a financial form of protection against fraudulent charges. They happen for a few different reasons:

1. **True Fraud:** The card has been stolen and unauthorized use has resulted in compromised payment information.
2. **Friendly Fraud:** This is a dispute by the cardholder with no malicious intent. Usually, the case where a family member uses the card without permission, the cardholder forgets what the charge was for, misunderstanding about the conditions of sale, the client was unhappy with the trip, etc.
3. **Chargeback Fraud:** A chargeback used as a form of refund. Common in the travel industry, and usually happens when a client doesn't understand the cancellation policy -or- is not eligible for a refund, so they decide to charge back the cost of their trip.

It's important to note that the chargeback process is skewed in favor of the cardholder, so it is always important for the agent to receive a Credit Card Authorization Form (CCAuth Form) from the cardholder.

### What is the Credit Card Authorization Form?

The Credit Card Authorization Form (CCAuth Form) is a document you review with your client and have them sign to authorize a charge to their credit card for their booking. The client also confirms you have reviewed the trip's terms and conditions (including cancellation policy) with them and confirms if the client has accepted or declined travel insurance/trip protection. Note – our form does not ask for the entire credit card number, only the last four numbers and you cannot write the CVV security code on the form. This is to stay compliant with federal law.

The only person who can sign the CCAuth Form is the person who is indicated on the credit card. If the government issued ID does not match the card holder, you cannot process payment. Do not accept signed CCAuth Forms from anyone but the card holder.

The CCAuth Form is located on your Xstream Agent Hub under Forms & Documents from the Resources Center tab. Anyone you are booking travel for including strangers, friends, and family members, should fill out a CCAuth Form for their trip. The form must be physically signed by the cardholder. eSignatures cannot be accepted. Be sure you also get a copy of the cardholder's government issued identification card (like a driver's license). You need to be sure that the person signing the form is the person they say

they are. This form is crucial and can help protect your business and personal finances from fraudulent bookings. This form is mandatory.

If you're not meeting with the client in person to have them sign, you can have them sign and scan the document with a copy of their government issued ID (to verify their identity). If you don't have a scanner, download an app like CamScanner to your smartphone. After your client physically signs the document, they can take a picture on the app, turn it into a pdf and email it back to you in a few short steps. Make sure your client fills out the form for the exact amount you will be charging their card at that time, and initials the form to either accept travel insurance or decline travel insurance. If they need to pay an additional charge –or – change their card for the next payment, please have them fill out a new form.

Please know, you do not need to send a copy to Xstream Travel. We would only ask for a copy of your client's CCAuth Form and government issued ID if we are notified by the vendor that the client has disputed the charge for their booking and has initiated chargeback. We would then work with the vendor and you to provide documentation to prove the charge was authorized.

### Common red flags that a booking is fraudulent

- **Last minute travel:** The client wants to travel immediately (within a few days of booking) and doesn't seem to care about price or duration of travel. This is especially common with air-only reservations and first-time customers. Some vendors offer last minute deals, but if you have a new client, you just met that wants to book on a whim, this is a cause for caution. Most new clients have a lot of questions and take some time to get to know you and decide on their trip details. New clients also don't generally book air-only reservations through a travel agent because they can easily do this themselves online. A good tip is to reserve last-minute deals for long-time clients you are familiar with, and to never book air-only reservations.
- **Suspicious address, email address, phone number, or credit card information:** Take a moment and conduct some research on the client before booking any travel. An easy step is to google the client's address, email address, and phone number online to see if they seem legitimate. Red flags would be VOIP phone numbers, invalid addresses, or .edu and .org emails for fake institutions or have strange numbers or characters in them (Example: [ChristinaD@Gobigbluehorseuniversity2.edu](mailto:ChristinaD@Gobigbluehorseuniversity2.edu) or [ShaunAnders@Amazonhelp.art](mailto:ShaunAnders@Amazonhelp.art)). Many email apps don't show you the full sender's email address by default anymore, click to reveal the full email address (some email programs have a little arrow by the name that reveals the full address) and you'll normally get the first clue something's not right. Also be cautious with foreign credit cards.
- **The traveler's name does not match the name on the credit card:** You always need to get a copy of the government issued ID -AND- a signed and initialed credit card authorization form from the person whose name is on the credit card. If the client knows the cardholder, why isn't the cardholder signing for this transaction?
- **Multiple credit card numbers provided:** If the first card is declined and another card is provided, this might be an indication of fraud. Take note if this client keeps providing a new credit card number till one "works." We all run into card issues every now and then, but most

travelers have prepared to pay for their trip and declining card numbers should clue you in that something may not be right.

- The departure city isn't near the cardholder's billing address -or- in their itinerary: Unless you're also booking transfers, how is the client getting home? It may be the case that the address they gave you isn't actually theirs. Ask the client why they aren't leaving from their home or returning to it.

Remember that some of these are only causes for caution. It means you should do a little more research into the client just to be sure they seem legitimate. A quick google or Facebook search may clear up the situation. It may also clue you into a problem. When in doubt, it's better to politely decline the client's request.

Below are email examples of attempts at true fraud

**From:** Melvin Smith Jr  
**Date:** September 6, 2014 at 12:05:22 PM CDT  
**To:** undisclosed-recipients;;  
**Subject:** booking

I need you to help me book a flight for a friend of mine from Accra (ACC) from 16th sep to Xiamen (China) but flight will transit in Singapore and returning on the 30th September. Kindly let me know an itinerary asap. Thanks

**From:** JEAN FRANCOIS BARRE  
**Date:** August 18, 2022 at 12:05:22 PM CDT  
**To:** undisclosed-recipients;;  
**Subject:** Air ticket request

Good Morning ! Hope you're well ? Please give me the quotation for these routes as below:

TRIP 1: Economic class LONDON (LHR) - CASABLANCA (CMN) - LONDON (LHR)

Departure date: 26/09/2022

Return date: 10/09/2022

From: JEAN FRANÇOIS BARRE  
Date: August 18, 2022 at 12:08:22 PM CDT  
To: undisclosed-recipients;;  
Subject: Air ticket request  
TRIP 2: Economic class DAKAR (DSS) - CASABLANCA (CMN) - DAKAR (DSS)  
Departure date: 19/08/2022  
Return date: 10/09/2022  
Direct flight with Royal Air Maroc or Air Senegal. Thank you and we look forward to hearing from you.

Notice in the examples above the email was sent to “undisclosed recipients.” This means they are emailing multiple people to see which one “bites.” How do they know the airport codes? If they’re this travel savvy, why haven’t they booked this flight themselves? Another clue would be if you’ve never had any correspondence with this person. Be cautious of booking for friends of friends, or bookings from outside the US to other destinations outside the US if you do not know the client personally. If someone outside your country asks you to book an air-only reservation for someone you don’t know, this is a red flag. Delete the spam and move on.

The examples above were straightforward. Other cases may be more difficult to determine if it’s fraud. Use your best judgement and if you ever feel uncomfortable, listen to your gut and politely decline the client's request (or if an email, delete as spam).

### How do I fight a chargeback?

The agent must provide proof that the cardholder was involved in the booking, authorized the credit card transaction, was provided the terms and conditions of the booking, and either refused or accepted trip protection/travel insurance. You will need to provide:

- A copy of the card holder's government issued ID to prove the identity of the cardholder was validated.
- A signed credit card authorization form from the cardholder to prove the cardholder authorized the transaction.
- An initialed credit card authorization form that clearly shows the terms and conditions of the booking was accepted by the cardholder, and that the trip protection/insurance was accepted or declined.

The good news is this is all on one form that Xstream has provided to you! The Credit Card Authorization Form you can use for your bookings is located on your Xstream Agent Hub under Forms & Documents from the Resource Center. Be sure to also get a copy of the cardholder's government issued ID.

Although nothing can prevent chargebacks 100% of the time, the credit card authorization form is an important resource we've provided to help protect you and your business.

### Can I use the vendor's credit card authorization form?

Yes, as long as the form also has a place for the client to confirm they understand the booking terms and conditions AND allows them to accept or refuse trip protection/travel insurance. Some vendors may even require you to get their own credit card authorization form signed. There are also other credit card authorization form templates online that you can use.

If you decide to use another credit card authorization form, just make sure you are getting in writing that the cardholder authorizes the charge to their credit card, has reviewed the booking's terms and conditions, and has either accepted or refused trip protection/insurance. Also get a copy of their government issued ID to verify the client's identity.

### What if my client's refund is taking too long to receive from the vendor?

Contact the vendor and work with them to help your client receive a refund. Even if the refund process is taking a bit longer than the client anticipated, never encourage your client to chargeback for a refund. The chargeback process can take over 6 months depending on the vendor or bank, and you will be held liable to payback the funds either to the vendor or Xstream Travel.

As travel begins to pick up (and in the digital age when booking online is so easy) fraud increases. Although nothing can prevent fraud 100% of the time, the credit card authorization form is an important resource we've provided to help protect you and your business.

# The Booking Desk

## Booking Desk

The Xstream Travel Booking Desk is like an invoicing system and is located on your Xstream Agent Hub under the Booking Desk tab. Posting a booking to your Booking Desk is providing information to Xstream Travel so we know who to give commission to when it is received from the vendor. In order to receive any commission from Xstream Travel for bookings, you must post your bookings to your Booking Desk located on your Xstream Agent Hub.

## How to Post a Booking

**Step 1:** Log into your Xstream Agent Hub and click on the “Booking Desk,” tab. Next click on “Post a New Booking.” Here is where you will post your booking’s details, so be sure to have the confirmation information from the vendor handy.

**Step 2:** Select the vendor’s name from the drop-down menu. If you don’t see your vendor’s name listed, please scroll down the list to the very bottom, and click “other.” You can then type the name of the vendor into the box provided.

**Step 3:** Input the confirmation number for the booking into the “Booking Number,” field. Not sure what to put here? First, refer to your Vendor List in case there are any instructions on what to post. For example, Expedia TAAP asks that you put the Itinerary Number. If you still are unsure, please contact the vendor directly and ask what information they will reference when they send the commission to Xstream.

**Step 4:** Input the passenger’s name. If you have more than one passenger, please input the lead passenger, and then the group name. Then input the travel start date and total trip amount.

**Step 5:** If you worked with a referral agent, please add their agent ID by clicking the “Add Referral Agent ID,” button. If you did not work with a referral agent, please leave this blank.

**Step 6:** Feel free to add notes to your booking by typing them into the note box. You can add additional passenger names or whatever information you’d like. Please do not write notes to Xstream in this section. If you need to ask us a question, please submit a help desk ticket under the “Travel Agent Support” category, and we’ll be sure to get back to you to answer any questions you may have.

## Commission

### What is Commission?

There is a common misconception that commission is an amount added to the cost of a vacation by a travel agent. Travelers think that they are paying extra for a travel agent's services, and that by buying directly from the vendor, it saves them money. This is not true!

Commission is a dollar amount that's built into a discounted rate for a vacation that vendors only supply to travel professionals. This rate is not available to the public. The commission is calculated on the base rate of the package, before taxes and fees are applied.

### Vendor Commission Percentage

One of the main benefits in being a part of a host agency like Xstream Travel is Xstream has high productivity levels with our preferred vendors, so our agents are eligible for higher commission percentage rates than they would be working outside of our host agency. To see the commission percentage paid by each vendor, please review your Vendor List. Please note, there is no commission for air only bookings.

**Helpful tip:** Preferred Vendors pay on a higher commission tier and usually pay out commission faster than other vendors. This means you should always research your booking with a preferred vendor first.

### Commission Payout

Your commission payout is dependent on what commission tier payment schedule you fall under with Xstream Travel.

New Faces	Tier 1	Tier 2
75%	75%	85%

For example, if you book a client on a Carnival Cruise and the base rate is \$1,000.00, Carnival's commission percentage is 16%, so total commission sent to Xstream Travel will be \$160.00. If you're a Tier 1 travel agent, you will receive a commission payout of 75% of the commission received by Xstream. This means the total commission you will receive will be \$120.00.

We also run vendor promotions multiple times a year to receive commission bonuses on qualifying bookings where you can earn up to 100% of commission earned!

## Service fees

Can an agent mark up their commission or charge a client an additional fee for their services? The answer is yes, in most cases. It depends if you or your client lives in a state with Seller of Travel (SOT) laws. For many bookings, you will be able to charge a service fee through the supplier. Those who live or have clients who live in states with SOT laws, this may be your only legal way to charge a service fee.

When the supplier does not have the ability to mark-up commission to collect a service fee, you can charge your fees through your own merchant account (Stripe, Square, PayPal, etc.). If you go this route, make sure you have your own Errors & Omissions insurance policy. If you or your client lives in a state with SOT laws you should check that law for that state. You may need to apply for your own seller of travel number to charge your fee, or you may not be able to charge the fee for the booking.

The service fee should be clearly explained to the client and collected upfront. Be sure to have your client sign a service fee acknowledgement form. Templates are easy to find online. You can google "Service fee acknowledgement template," or check sites like [Jotform](#), Formswift, TravelJoy, etc. You can also ask your fellow agents at Xstream if they are comfortable sharing their template! Join the private [Xstream Facebook group](#).

## How Commission is Paid

Vendors send commission payments directly to Xstream Travel. When a payment is received by Xstream our Commission Department searches the Booking Desk for your bookings' confirmation number to apply the commission. If we can't find your confirmation number, we can't post your commission. It's crucial you post your booking to your Booking Desk immediately once you receive the confirmation number or hold group space for your booking regardless if you've made the deposit or final payment. You can always edit the booking up until final payment. The total trip amount can be an estimate.

Once the commission has been posted to your booking and travel has been completed, the funds will be direct deposited to your bank account through Payoneer. Commissions are paid weekly on Fridays after 4pmCT. Agents must be in good standing with Xstream Travel *on the day of the commission run* in order to receive their commission. An agent is in good standing if their Xstream Travel account is paid to date, has fulfilled their agent agreement, and does not owe monies on an outstanding invoice.

In the event you change bank accounts, please update your banking information with Payoneer from your Xstream Agent Hub. If you need assistance with your Payonner account, please contact Payoneer directly at 1-800-251-2521 or [customercare@payoneer.com](mailto:customercare@payoneer.com).

**Important: Xstream Travel does not mail commission checks**

## How Long Does It Take to Receive Commission?

Each vendor pays differently, but for most bookings it usually takes 30-60 days after the travel end date for commission to be paid. We can only get it to you as fast as it is received by the vendor.



Occasionally, commission is received by Xstream Travel before the travel date. When this happens, commission will be posted to your Booking Desk and scheduled to be released to your bank account a week after the travel date. This is to make allowances for any changes in commission, cancellations, or commission recalls associated to the booking.

### Missing Commission

Has it been 60 days past the travel end date and you're missing your commission? Don't panic, our Commission Department is here to help! Here are the steps you should take:

**Step 1.** Review the information posted to your Booking Desk to insure you've entered the booking correctly.

- Is your confirmation number correct? Double check your zeroes and your O's, and your L's and I's. It's something very simple but can cause a delay with your payment if you've posted your booking incorrectly on your booking desk.
- Did you post the correct confirmation number? Review your Vendor List for instructions on how to post your booking. Some vendors require you to post the Itinerary number instead of the confirmation number. Some cruise lines pay to the group confirmation number only and not the individual cabin or traveler confirmation numbers.

**Step 2.** Did you book directly with a hotel? Call the vendor directly and ask if you need to send an invoice. The invoice form can be found in the Resource Center under Forms & Documents.

**Step 3.** Submit a Travel Commission Research Form. This form is required for any commission inquiry and is located on your Agent Hub. You must fill out the form completely. Filling out the form partially will only delay the research process. Remember, you are an independent contractor, not an employee of Xstream, so you are responsible for contacting the vendor about payment information for your commission.

**Important tip:** Always check your Vendor List for instructions on how to work with each vendor. When in doubt, contact the vendor directly and ask them how they will reference the booking on the commission payment statement.

### Commission Recalls

Suppliers will, at times, recall a commission previously sent to Xstream. This can be done for multiple reasons including client cancellations, supplier cancellations, refunds, etc. If this occurs, the supplier will contact Xstream Travel requesting that a partial or full commission be returned. Xstream Travel will only notify the agent if the commission has already been paid to the agent. The agent can either repay the portion of the monies due -or- Xstream Travel can deduct the amount due from a pending commission payout.

### Travel Commission Research Form

If you have not received your commission, and it has been 60 days past the travel end date, please submit a Travel Commission Research Form. This form is required for any commission inquiry and is located on your Agent Hub. You must fill out the form completely. Filling out the form partially will only

delay the research process. Please know, as an agent it is your responsibility prior to submitting a Travel Commission Research Form to contact the supplier/vendor and verify the following information.

- Confirmed that the commission was mailed or submitted via ACH, and the amount.
- Check # (if applicable) and the date.
- If direct deposit (ACH), the date of deposit and the batch total.
- Confirmed check cleared date is paid by check.
- The confirmation number is referenced on the check or payment remittance.
- Document the name of the person that you spoke with.

Once the Commission Department has received your form, you will hear back within 1-2 business days to follow up with you concerning your submission. If the reason there was a delay in your commission payment was because your booking was not posted on the Booking Desk prior to us receiving the commission, you will be charged a \$10 research fee which will be deducted from your commission.

Please know, we only accept Travel Commission Research Forms up to 12 months past the travel end date. It's important to keep track of your bookings and when commission is due.

# Part 3

## Understanding Travel

# Geography

## Geography

As a travel agent, you are not just restricted to cruises, a beach vacation, or the United States. You are selling the whole world to your clients. In order to maximize the experience for your clients, you need to know the geography of the world. You don't need to be an expert, but just be aware of a few basics that will affect your clients in a general sense.

## Climate

It's important to know the general climate of a few different regions around the world. Latitude, altitude, terrain, and nearby water bodies all affect the climate of a place. For example, locations along the equator experience consistent warmer temperatures and day lengths all year round. The further you get from the equator, depending on the season, the more varied the temperature and day lengths get. For example, the sun sets in Scotland around 3-4pm in the winter season. You would need to keep this in mind if you sent a client to Edinburgh to visit family for the Christmas holiday and they wanted to do a day tour. You would need to make sure the tour was over by 3pm so the client wouldn't be sightseeing in the dark.

## Weather

Keep in mind that weather varies depending on the season and hemisphere. Pay particular attention to the seasonal differences between the Southern and Northern Hemispheres, and when rain and monsoon season are. The Northern and Southern Hemispheres experience opposite seasons.

### Northern Hemisphere

Winter: December, January, February

Spring: March, April, May

Summer: June, July, August

Autumn: September, October, November

### Southern Hemisphere

Winter: June, July, August

Spring: September, October, November

Summer: December, January, February

Autumn: March, April, May

Most countries measure their temperature in Celsius. Keep this in mind when you are researching countries or destinations for your client. A summer temperature in Croatia of 30 degrees is quite warm. This is handy to know when you're looking at international websites.

**Helpful tip:** If your client wants to have Christmas on the beach, where should you send them?  
Somewhere in the Southern Hemisphere because Christmas is in December which is a summer month.

## Time Zones

When dealing with flights that start in one time zone and land in a different time zone, the arrival and departure times are always in the local time zone of that airport. For example, if a flight from Dallas departs at 7:00 a.m. and arrives in Denver at 8:00 a.m., you might be tempted to think it's an hour flight, right? Wrong. Dallas is in central time zone and Denver is in mountain time zone. Dallas is an hour ahead of Denver, so really the flight is two hours long.

### **Times posted on air tickets and boarding passes will always be in local time**

It's also good to be aware that most countries in the world use a 24-hour clock or military time. This is used especially in the travel industry and for booking tickets overseas. For example, if you book a 5:30 flight from Paris to Brussels, be sure to double check if the ticket is in military time, and that the client is aware. You might be booking a ticket at 5:30 in the morning instead of the evening. Written in military time, 5:30pm is 17:30.

**Helpful tip:** It has been scientifically proven that flying east is more difficult on your body than flying west. Flying east shortens your day and the body has a harder time adjusting. This means it would be unwise to plan a day-long tour of Paris for your client's first day in Paris. A long, energy requiring event such as this would be better suited for a later day of the trip when they have had a little time to adjust to the time change.

## Dates

It's important to understand the date when you book a reservation. Clients traveling internationally should be informed that dates might be written differently and they should always ask for specification if they have any questions or concerns. For example, the American way to write the date is month, day, year. So October 12<sup>th</sup>, 2022 is 10/12/22. The European way to write the date is day, month, year so the 12th of October 2022 is written 12/10/22. Always double check you have the correct dates.

You also want to be aware of time zones affecting the date. When flying overseas your departure date could be different than your arrival date, so you'll need to book the accommodations accordingly. For example, let's say your client is flying from Dallas to Athens, Greece and leaves on September 6<sup>th</sup>. You notice on their ticket they don't arrive until September 7<sup>th</sup>. You need to pay attention to that arrival date to be sure you don't book their hotel in Athens on September 6<sup>th</sup> because they'll still be in the air.

### Some additional helpful tips:

- ❖ **Current events:** Stay up to date with what's going on in the countries around the world. Especially with any safety concerns the client should be aware of before choosing their destination.
- ❖ **Tipping and Bargaining:** Tipping and bargaining are practiced differently depending on the country. Some countries do it, some don't. Giving this information to your client provides a helpful touch they will appreciate.

- ❖ **Power converters:** Outlets are different all over the world, and it's good to look up and see what kind of outlets your client's destination uses. Sometimes the country could use U.S. outlets and that's very convenient. Other times, the client may need a power converter and/or adapter.
- ❖ **Social Norms and Faux Pas:** Make sure your client knows about any social norms that they might need to respect. Can they wear shorts in a cathedral? Is it a faux pas to tip after a meal? A little research into the culture of the client's destination can help educate them so they don't commit an embarrassing social gaffe.

**Note:** You will never be able to foresee every single issue that comes up. All you can do is best prepare for it. A quick internet search will give you a wealth of information, charts, and documents you can save to educate and prepare your clients.

### Airport Codes

As a Travel Professional, you should make yourself aware and know the airport codes for your home city and surrounding areas along with the major points of destination in the U.S. and abroad. You will find a pdf of the codes in your Agent Hub Resource Center.

**Hot tip:** Want to learn more? Check out the Explore the World tourism geography reference guide offered by The Travel Institute. It provides nuanced information and anecdotes that create manageable but meaningful destination overviews that include history, culture, climate, transportation, cuisine, accommodations and more.

# Cruising

## Brief History

Prior to the 19<sup>th</sup> century, most ships were primarily concerned with cargo. In 1818 Black Bell Line based out of New York was the first shipping company to offer regularly scheduled passenger services from the US to England prioritizing passenger comfort. It wasn't until 1844 that the first pleasure cruise took place. It was very luxurious and mainly reserved for the wealthy. Then with the advent of the first and second world wars and the rise of transatlantic flights, the luxury ocean liner industry crumbled. The shipping companies that once carried millions of passengers all around the world had to find new use for their ships or retire them. Some became cargo ships, others converted into troop carriers, some retired, and some created the modern cruise industry.

The beginning of the modern cruising industry began in the 1960s-70s. It was the first time in history cruises were advertised as complete vacation experience rather than simply transporting people from place to place. Massive transformations have been an integral part of the modern day-cruise industry and its growth since the 1970s. With the introduction of the first "mega" cruise ship, the Sovereign of the Seas by Royal Caribbean in the late 1980's, cruise ships today have become floating resorts, with everything from roller coasters, tattoo parlors, atriums to wave pools, and more. Hundreds of ships have been introduced in the last two decades alone, with innovative and modern facilities and amenities. Cruising continues to evolve, like the introduction of flexible and alternative dining, themed restaurants, modern health, spa, and fitness facilities, as well the addition of popular brand shopping options onboard. Your clients can wake up, visit a Starbucks, attend a spin class, purchase new sandals, then head to a Broadway show after a quick dip in the pool, all without leaving the ship.

Cruising is one of the best vacation products with one of the highest satisfaction rates in the industry, and cruise lines continue to raise the bar with newer more modern renovations, and more ports and destinations each year.

## Basic Terminology:

**BERTH:** Beds

**CABINS/STATEROOMS:** Rooms like a hotel room

**KNOT:** Measurement of speed

**ROLL:** Ship's side to side movement

**STABILIZERS:** Minimize the roll of the ship

**PITCH:** The up and down movement of a ship

**COUNTRY OF REGISTRY:** the country and the maritime law that the cruise ship is subject to operate under.

**GRT (GROSS REGISTERED TONNAGE):** Amount of revenue-producing enclosed space

**SPACE RATIO:** A ship's GRT, gross registered tonnage, divided by the number of passengers

**TENDERS:** small boats that take passengers from the large cruise ship to the shore when the harbor is too shallow or too crowded and there is not a pier to dock at.

**EMBARKATION POINT:** The original point of departure

**DEBARKATION:** The port where the cruise ends

**PORTS OF CALL:** The destinations a cruise ship visits

**PORTHOLES:** Windows

**GALLEYS:** Kitchen

**GANGWAYS:** The ramps to get on and off the ship

**PORT SIDE:** Left of the ship

**STARBOARD SIDE:** Right of the ship

**STERN OR AFT:** Back of the ship

**MIDSHIP:** Middle of the ship

**BOW:** front of the ship

### Different Ship Categories:

- **CONTEMPORARY:** These are the resort style brands. It's also known as the mass market category, and generally the size is mid to huge, the price is moderate, and the personality is casual with multiple on-board activities available. Some examples are Carnival Cruise Line, Royal Caribbean Cruise Line, and Norwegian Cruise line.
- **PREMIUM:** These are midsize to large, and the price is moderate to high. The personality is casual to upscale, so it's more resort style activities with plush features. Some examples are Celebrity Cruise Line, Holland America Line, and Oceania Cruise Lines.
- **LUXURY:** These are smaller to midsize, and the price is going to be high to deluxe. The personality can range from casual to upscale, so you have more personalized service, exotic ports, and plush features. Some examples are Crystal Cruises, Regent Seven Seas Cruises, and Silversea.
- **SPECIALTY/EXPEDITION:** These are niche, the size is usually small to midsize, and the price is moderate to deluxe. The personality is casual to upscale, so it has varying amenities and activities based on the distinct focus of the cruise. Some examples are the Delta Queen Steamboat, a riverboat cruise down the Mississippi, or Voyages to Antiquity, which is a cruise that explores the architecture, archeology, history, and culture of ancient civilizations along the Mediterranean.
- **RIVER CRUISES:** These are smaller ships because they need to fit on rivers. The price is usually moderate to deluxe. The personality is casual to upscale, and its varying amenities and activities are based on the distinct focus of cruise. Some examples are Viking River Cruises, AMA Waterways, Uniworld, and Avalon.

## Cruise Destinations

The most popular destinations for cruisers are the Caribbean, the Bahamas, and Eastern Mexico.

### Caribbean

- **Eastern Caribbean:** Ports of call include San Juan, Puerto Rico, St. Thomas, St. Croix, and the Dominican Republic. The most common embarkation point will be Florida. The high season is mid-December to mid-April, and the low season is summer and fall because of tropical storm and hurricane season. The Eastern Caribbean includes the Dominican Republic, Puerto Rico, and the Virgin Islands.
- **Western Caribbean:** Ports of call include Jamaica, the Cayman Islands, Mexican's Yucatán Peninsula, which has Cancún. Florida is the common embarkation point along with Texas and



Louisiana. The high season is mid-December to mid-April, and again this is because of the tropical storm and hurricane season in the summer and fall.

- **Southern Caribbean:** Ports of call include St. Maarten, Antigua, Martinique, St. Lucia, Barbados, Grenada, and more. Florida is the common embarkation point. High season is mid-December to mid-April, and low season is summer and fall because of the storms.

## Bahamas

Ports of call include Nassau, Grand Bahama, and Freeport/Lucaya. The most common embarkation point is Florida. High season is mid-December to mid-April, and summer and fall are the low seasons because of tropical storms.

## Bermuda

Ports of call include Hamilton, St. George, and Dockyard. The most common embarkation point is New York. The high season is April to October, and they are not available during cold months.

## Western Mexico

Ports of call include Ensenada, Mazatlán, Puerto Vallarta, Acapulco, and Cabo San Lucas. The most common embarkation point would be Los Angeles or San Diego. The high season is winter and spring, and the low season is summer and fall, again because of storms.

## Hawaii and South Pacific/Asia

Ports of call include the Hawaiian Islands, Tahiti, New Zealand, Australia, Singapore, China, and Japan. The most common embarkation points are Honolulu, Los Angeles, or San Francisco. The high season is December to April, and the low season is May to September.

## Alaska

Ports of call include Juneau, Sitka, Victoria, British Columbia; and Vancouver, British Columbia. The most common embarkation point is Vancouver, Seattle, or San Francisco. The season is May to September. These are the only months that you can cruise Alaska.

## U.S. East Coast/Canada

Ports of call include Prince Edward Island, Nova Scotia, Quebec, Bar Harbor, Boston, and Newport. The most common embarkation point is Boston. The high season is September to October during the beautiful fall colors, and the low season is May to August.

## South America

Ports of call include Buenos Aires, Argentina, Tierra del Fuego, Cape Horn, Galápagos Islands, etc. The most common embarkation point is going to be depending on which route you take. The high season is November to March, and the low season is April to October because remember they're in the Southern Hemisphere down in South America, so the seasons are flipped.

## Europe and Mediterranean

The second most popular destination for cruisers.

- **Northern Europe (Scandinavia and Russia):** Ports of call include Norway; Stockholm; Sweden, St. Petersburg; Russia, or Helsinki; Finland. Your common embarkation point is going to be

Copenhagen or Hamburg. The high season is June to August, and the low season is September & May. They do not sail year-round due to the cold temperatures.

- **Western Mediterranean:** Ports of call include the French Riviera; Barcelona, Spain; Malta; Sicily; Naples, Italy. The most common embarkation point is usually Italy. The high season is May to September, and the low season is October to April. Not all cruise lines sail year-round in the Mediterranean. Typically, the season is April to November.
- **Eastern Mediterranean:** Ports of call include Mainland Greece, Greek Islands; Istanbul; Turkey; Ephesus, Turkey. Your most common embarkation point will be Athens, Greece. The high season will be May to September, and the low season will be October to April.

### Specialty/Themed Cruises

Any type of cruise that's designed around a certain type of interest or theme. Examples are, beauty and fitness programs, food and wine, theater and the arts, Christmas and holiday cruises, etc. Another example is a world cruise, like The Grand Tour which tours the world and offers a jump on for part of the journey, so travelers can do part of the world or the whole world. There are also transatlantic cruises which cross the Atlantic Ocean and travel between the U.S. and Europe.

### Expeditions and Special Interest Cruises

Designed around special types of tourism. For example, Fathom sails to Dominican Republic and is designed as a humanitarian and voluntourism cruise. An example of an expedition cruise would be the Lindblad Expeditions and National Geographic cruises. They offer authentic exploration and adventure. Some of their most popular destinations are the Galápagos Islands and Antarctica.

### Repositioning Cruises

When a cruise line finishes a season, they need to move their ships to another part of the world. This is called repositioning and offer significant discounts.

## Life on a Cruise

Guests will be staying in cabins, also known as staterooms, while on their trip. Cabins are usually smaller than the average hotel room with most of the same basic amenities. In the typical cabin, a passenger could expect to have a television, a dresser, a closet, a mirror. The bathrooms will have a toilet and a washbasin as well as a shower. Only in Suites will you find in-cabin mini bars or refrigerators, or bathrobes, so depending on what your client wants, check and see what the rooms come with.

### 4 Most Common Cabin Types:

1. **INSIDE:** Smallest sized room with no windows or balcony.
2. **OCEAN VIEW:** Generally, the same size as an inside cabin with a porthole or large picture window viewing outside.
3. **BALCONY OR A VERANDAH ROOM:** Generally, a bit larger than an inside cabin and features a verandah or a private deck.
4. **SUITE:** A larger cabin often with separate living and sleeping areas, usually with extra amenities.

## Dining

- **Traditional Dining:** Every passenger is assigned a table that seats six to eight people. There are usually two sitting times, the first or early dinner and the second or late dinner, and the passengers usually decide or reserve which sitting time they would like.
- **Freestyle Dining:** First adopted by Norwegian Cruise Line, but now offered on many ships. No assigned seating or dining times, as well as multiple restaurants that passengers can choose where and when to eat.

Some cruise lines offer 24-hour dining and can accommodate special diets. Make sure you let them know ahead of time.

## Entertainment

Different ships come with different entertainment options. Some ships have shops, pools, kids only play areas, casinos, a library, dance clubs, lounges and bars etc. Ships also offer daily activities like movies, sports, games, etc., and these will be posted in the ship itinerary for passengers to attend at their leisure. Some ships even offer Vegas style shows and theaters, or on-board classes in dance, cooking, aerobics, yoga classes, etc. Again, these vary by ship.

## Shore Excursions

Shore excursions are land trips offered by the cruise line for an additional fee, that are usually conducted by local tour operators under contract with the cruise line. These are activities specific to the culture of the port a cruise is docked in, like swimming with dolphins or zip lining through the rainforest and can be purchased as a package from the cruise line on-board the ship or you as the agent can book them for the client using one of the 3<sup>rd</sup> party vendors and earn commission. The cruise lines shore excursions are not commissionable to the agent. Shore excursions can sell out before the ship sails, so it is in the client's best interest to pre-book them with the cruise line or purchase them from you.

## Pros and Cons of Cruising

PROS	CONS
<b>PREPAY FOR MOST EXPENSES:</b> this allows clients to get a more accurate idea of the cost of their trip because most expenses are paid up front.	<b>SEASICKNESS:</b> Can be handled with proper medication. Try putting them on a larger ship
<b>VARIETY:</b> Some ships visit multiple ports and locations. There are also multiple options for entertainment.	<b>CROWDS:</b> Some ships hold 6000 passengers. If your clients don't like crowds suggest a smaller ship or luxury cruise.
<b>LESS STRESS:</b> All activities, entertainment, destinations, and meals are taken care of. This can be less stressful than other forms of travel. Your client doesn't need to plan anything other than when they want to do whatever they feel like. Especially helpful for families. You can only go so far on the ship, it's easier to find family if you get lost.	<b>LESS FREEDOM IN PORT:</b> There are specific times passengers must return to the ship after shore excursions. May be an issue with those that prefer a more independent type of travel

## Price

### What's included?

The price of the cruise includes the cabin, meals, entertainment, and most activities.

### What's not included?

The price of the cruise does not include tips/gratuities, which range from \$12 to \$16 per person per day, personal purchases, specialty restaurants, gambling, salons, shore excursions, and usually any specialty drinks like alcohol and soft drinks. These are wine, beer, bottled water, cocktails, etc., but most can be purchased as part of a drink package, which is a one-time fee to include all drinks during the passenger's trip. Any purchase not included in the price of the cruise are added to the room on a credit system. The passenger then pays to at the end of the cruise. This is much like charging a room when you are staying at a hotel and must pay before check-out.

### What affects the Price?

- **NUMBER OF PEOPLE IN A CABIN:** Prices quoted are per person at a double occupancy rate. Cruise lines expect two people per room. There are single supplement charges, as well as a third and fourth person rate if more than two people will be sharing the room.
- **THE TYPE OF CABIN:** an inside cabin will be less expensive than a suite.
- **LOCATION OF CABIN:** The higher the deck, the closer to midship, forward or aft determine the price of the cabin.
- **LENGTH OF CRUISE:** The longer the cruise, the higher the price.
- **SEASON:** High season will be more expensive, lower season will be less expensive.
- **THE SHIP ITSELF:** Some ships are more expensive to travel on.
- **TAXES, FEES, AND PORT CHARGES:** These are not always included in promotional prices. If you see a cruise being advertised for \$200, be sure to look at the fine print. This price may not include taxes, fees, or port charges.

## Training

The main thing to do before selling cruises to your clients is to become educated. All major cruise lines offer free training to familiarize yourself with their products and destinations. You can also take advantage of trainings with CLIA and the American Society of Travel Agents (ASTA). Keep in mind, even if you take every single training opportunity out there, it's next to impossible to memorize every ship, itinerary, services, etc. Don't overwhelm yourself with information. Start by working with our preferred cruise vendors first. Be sure to check your vendor list for instructions on how to work with each vendor.

**Did you know?** 70% of cruises are booked through travel agents, so cruise lines want to offer you as much training as possible to sell their products and services!

## How to choose the right cruise

So, your client wants to go on a cruise, but how do you start? First, qualify your client/s. Figure out their personality, what they like, where they want to go, how many people are going on the trip, what kind of activities they like, do they have young kids, is this a romantic getaway, etc. Realize that there is no all-encompassing website or perfect place to go to plug in all your information and the perfect cruise will just pop up, you will need to do some research and filter out unsuitable choices. Each cruise line has a different personality. Filter down vendors by cruise line, destination, the length of cruise, embarkation point, the date, and the type of ship. This should narrow down your results for you to choose the best ship to make one or two quotes for your client. Be sure it includes most if not all the requirements based on how your client answered your qualifying questions.

## Making a booking

Reservations need to be made as early as possible to get the best rates. You should plan on booking 8-20 months in advance of the sail date. You need the names, ages, and citizenships of all travelers (as it appears on their passport). You need their cabin type preference, first or second seating in dining room preference, special occasions that are being celebrated, first time or repeat customer with this cruise line, pre-booked shore excursions — remember, you can make commission on these when booked with a 3<sup>rd</sup> party vendor — and any additional needs such a medical or accessibility requirement, if they have dietary restrictions etc.

**Important:** A passenger cannot be more than 24-weeks pregnant or they will be denied boarding. A polite way to bring this up in conversation is, “Are there any medical conditions or accessibility requirements that I should know about before making your booking? For example, does anyone require wheelchair access or is there a pregnancy?” If they say yes to pregnancy tell them about the 24-week policy. Additionally, be sure to let your passengers know that there are limitations of onboard medical care. Travelers with medical conditions should consult their physicians to insure they are healthy enough to travel.

Once you receive a Credit Card Authorization Form from your client, make your first payment immediately. Keep track of all payment due dates. It is your responsibility as an agent to notify your clients before a payment is due, and to make payments on their behalf before the deadlines. If there are any itinerary changes (due to weather or political issues) tell your client.

Now that you have chosen the cruise your client wants, and have applied the deposit, you will receive or can email yourself the Booking Confirmation. Each cruise line will provide an agent copy (showing commission) and a client copy (no commission showing).

## Reviewing the Confirmation

The first thing you need to do is carefully go over the confirmation, making sure that the client's name is spelled correctly and that all the other information is correct. The rate breakdown is as follows: Guest 1 & Guest 2 will typically be the same cost unless there is a special promotion like the 2<sup>nd</sup> person is half off.

Agent copy:

- ❖ **CRUISE FARE**- this is the base rate of the cost of the cabin. It does not include any taxes, port charges or misc. fees. This is the fare that your commission is based on. In this example, your commission is based off \$1498. \$2850 minus the discounts of \$1352.
- ❖ **NON-COMMISSION CRUISE FARE (NCF/NCCF)** – You will not be paid commission on this amount. It is a combination of misc. charges that the cruise lines charge. This example shows a discount promotion that RCCL was giving at the time of booking. This amount has been deducted from the total cost.
- ❖ **VPP** – Vacation Protection Plan. This client has declined the protection
- ❖ **TAXES, FEES, AND PORT CHARGES/EXPENSES** – The total of all these charges
- ❖ **GROSS CHARGES** – The total of all of this added and subtracted to give a final cost for the client
- ❖ **COMM/ADMIN** – Your commission amount
- ❖ **NET CHARGES** – The Net cost of the cruise (No commission included)
- ❖ **AMOUNT PAID** – Any payments made will be shown here
- ❖ **BALANCE DUE** – Balance after any payments made
- ❖ **THE FINAL PAYMENT DATE.** (Keep in mind that most cruise lines will automatically cancel the reservation if the payment is not made by this date)
- ❖ **CANCELLATION POLICY AND BOOKING TERMS.** You need to be sure to email the client copy to your client. That way you are giving them all the important information including the cancellation policy.

Guest Copy:

- ❖ **CRUISE RATE** – This is the Base Fare + the NCF's. All cruise lines will show this figure to the client as one total. All their advertising rates will include the NCF's.
- ❖ **TAXES, FEES & PORT EXPENSES** – This is the total of all these charges
- ❖ **TOTAL CRUISE CHARGES** – The total of these two.
- ❖ **ANY PAYMENTS MADE AND THEN THE GROSS BALANCE DUE** from the client and the final payment due date.
- ❖ **EMAIL THIS COPY TO THE CLIENT** as it has important information and disclosures. If the cancellation policy is not listed, you will need to give it to them.

## Air/Sea Packages

Travelers will need transportation to and from the embarkation point. Many travelers arrange their own flights and pay a cruise-only rate for the cruise itself. Others will take advantage of special fly/cruise arrangements. These air/sea packages come in three varieties:

- The cruise line arranges air charter between major cities and the point of embarkation.

- The cruise line gives the travelers an air credit, and they arrange their own itinerary. If the flight they choose costs more than the credit, the traveler pays the difference.
- The cruise line negotiates a schedule and rate with the airline and pays for the round-trip air service to the embarkation point. Travelers do not have control over the choice of airline or schedule.

The benefit of an air/sea package is that the cruise line is responsible for getting the passengers to the ship and for any transfers. If there are any delays or cancellations the airline will assume responsibility for any refunds or fly the travelers to the next port of call to catch the ship. In contrast, when travelers make their own flight arrangements they are responsible for making it to the ship on time.

### Go the Extra Mile

Some agents choose to go the extra mile to give their clients a memorable and positive experience of working with a travel agent. You can set up bon voyage gifts for you clients like a bottle of wine or a gift bag in their room. It could be something as simple as giving them information on their destinations, immigration information, customs forms, or suggestions on fun activities or restaurants to check out at their ports of call. Make your client's trip memorable, and they are more likely to come back to you with future business.

## Introduction to ocean cruise vendors

Cruise lines have undergone a great deal of consolidation and mergers. Back in the mid-1980s, Carnival Cruise Lines' fleet consisted of five ships; now there are over 20 ships plying the waters under the Carnival logo alone. The parent company, Carnival Corporation, consists of six different cruise lines called The World's Leading Cruise Lines. These include Carnival Cruise Lines, Costa Cruises, Cunard Line, Holland America Line, Princess Cruises, and Seabourn. All of these cruise lines have kept their separate identities, with distinct products, unique services, and a wide range of offerings.

When Celebrity Cruises became part of the Royal Caribbean International Corporation in 1997, the cruise lines remained separate, each forging ahead with their own distinct branding. In 2007 a third cruise line, Azamara Club Cruises, was launched. A premium cruise line, Azamara has more intimate ships sailing to more exclusive destinations.

First established in 1966, and then called Norwegian Caribbean Line, Norwegian Cruise Line was one of the early cruise lines known for industry firsts, such as offering the first private "out island," and famous name entertainment onboard. Norwegian continued to forge into new markets with unique choices, specializations, and new ships. In November 2014, the parent company, Norwegian Cruise Line Holdings, Ltd., acquired Prestige Cruises International, which includes Oceania Cruises and Regent Seven Seas Cruises.

Another growing cruise line is MSC Cruises. In 2003 they launched a \$3-billion expansion program. This continues with more new ships entering service over the next few years. MSC Cruises' parent company, Mediterranean Shipping Company, is the second largest freight container company in the world. They've expanded their North American efforts with MSC Cruises USA located in Ft. Lauderdale. Building brand

awareness into the North American market is a key focus as the cruise line expands. In addition, the cruise industry has seen the emergence of the “deluxe/upper premium” category, and growth of the luxury cruise lines. And the explosive expansion of the river cruise industry continues, not just over in Europe, but in the U.S. as well.

## Meet the vendors

### Carnival Cruise Lines

Carnival Cruise Lines has long been known for its success with the “Fun Ships” branding and has led the way in unique cruise ship designs and themes. With spacious staterooms, Carnival continues with a wide variety of entertainment offered in its lounges, showrooms, and clubs. Expanding alternative dining options, creating waterparks, and adding more partnerships have created even more options for guests.

In 2011 Carnival Cruise Lines launched their Red Frog Pub, along with a private label beer. In 2014 they entered into an exclusive agreement with Cigar City Brewing, and now offer two craft beers on 13 of their ships. Although the ships vary as far as size, design and passenger capacity, consistency is a key focus. In addition to expanding with new ships, Carnival Cruise Lines enhances their existing ones. “Evolutions of Fun,” involved extensive makeovers on their eight “Fantasy-class” ships, which included adding expansive Carnival WaterWorks aqua parks.

Carnival’s cruises range from three to 23 days and destinations include the Caribbean, Bahamas, Mexico, Alaska, Hawaii, New England, and Panama Canal.

### Costa Cruise Lines

With its tagline and marketing theme “Cruising Italian Style...That’s Amore,” Costa Cruises has long been known for its Italian ties and tends to appeal to both the international as well as U.S. cruise markets. Costa offers a wide variety of itineraries throughout Europe in spring and summer months and is known as “Europe’s # 1 Cruise Line.” Costa has seasonal sailings to the Caribbean. The successful launch of their Samsara Spa in 2006 and exclusive Spa accommodations provide options for guests and groups. Their ships offer a European flair and Italian-style themes, seen with the use of extensive marble in their designs.

Costa’s ships sail extensively in Europe, but also travel to other destinations. They cruise to the Red Sea, Eastern/Western Mediterranean, Far East, Dubai, Norwegian Fjords, South America and Transatlantic.

### Disney Cruise Line

Disney Cruise Line’s ships offer the elegance and décor of superliners of yesteryear, coupled with modern facilities designed with the entire family in mind. Expansive, dedicated children’s areas and extensive youth programs are the line’s strength, but they have also successfully created entertainment and areas specifically for adults. The entertainment is particularly strong, with full Broadway-style shows included. Even the dining offers an entertainment twist, with themed dining rooms, as well as a reservations-only restaurant for adults. And Disney’s private Bahamian island, Castaway Cay, continues with the theme of offering beach facilities geared towards all its passengers. There’s even a private,



adults-only beach. Disney Cruise guests can also enjoy poolside movies on a state-of-the-art jumbo LED screen affixed to the forward funnel on deck 9.

Disney Cruise Line's four ships sail to the Caribbean, Europe, Alaska, and Bahamas.

### MSC Cruises

Founded in 1990, MSC Cruises is part of the Mediterranean Shipping Company family, a privately-owned shipping group that includes the second largest freight container company in the world. MSC Cruises' fleet has gone through an aggressive expansion program - 640 percent growth in just a 10- year span, with 12 modern ships and four new ships scheduled. MSC's ships sail year-round out of Europe, but they've been expanding their presence in the North American market. MSC Cruises provides Mediterranean hospitality and international cuisine.

They also offer a variety of theme cruises. In 2008, MSC Cruises introduced a cruise industry first on their MSC Fantasia. Called the MSC Yacht Club, this "ship within the ship" area features a special luxury suite area, butler service for guests, private pool, lounge, restaurant, and a dedicated concierge.

MSC sails to the Caribbean, Panama Canal and South America, as well as extensively in the Mediterranean.

### Norwegian Cruise Line

Known for innovations, Norwegian Cruise Line was the first major cruise line to offer true flexibility for their guests when they introduced "Freestyle Cruising" in 2000. Adding more dining options, and with no fixed dining times or pre-assigned dining, as well as expanding restaurants, Norwegian Cruise Line has elevated cruising to more personal choices. They have specialty restaurants along with complimentary ones. Part of "Freestyle Cruising" involves dress codes that are resort casual, with an optional formal night. In addition, Norwegian Cruise Line led the way by simplifying their tipping program by automatically adding gratuities to the guest's account, which the guest could alter if desired. (Other cruise lines quickly followed their lead.)

In 2004 Norwegian Cruise Line began offering year-round sailings around the Hawaiian Islands. Currently their ships sail to the Caribbean, Hawaii, Alaska, Bermuda, Canada/New England, Bahamas and Florida, Europe, Mexican Riviera, and Canada. And Norwegian Cruise Line continues to lead the way with their innovative staterooms. These include the Studios for solo travelers, which includes their own Studio Lounge. Another is The Haven by Norwegian™, their exclusive enclave with spacious accommodations, The Haven Courtyard area with private pool, sundeck, hot tub, and private fitness area, along with butler service and more. Norwegian Cruise Lines has led the way with aqua parks, sports complexes as well as Broadway entertainment, shows and comedy.

### Princess Cruises

A cruise line not content to sit back on its success and name recognition, Princess Cruises has led the way when it comes to more innovation in its cruise ship designs and is one of the best-known names in the cruise industry. In 2015, Princess Cruises celebrates its 50th year. Princess Cruises made the balcony stateroom affordable and launched the first 24-hour casual dining restaurant in the industry, as well as its "Anytime Dining" option and specialty restaurants.

Always well known for excellent entertainment, Princess Cruises introduced “Movies under the Stars,” offering outdoor movies for cruise guests to enjoy. And they’ve continued to offer more industry firsts on their ships, including the Skywalk, new dining options, and private pool areas.

Princess Cruises has some of the most expansive and global cruise itineraries, sailing to Europe, Alaska, Caribbean, Mexico, Canada and New England, Asia, Panama Canal, Australia and New Zealand, India, Africa, South America, Hawaii, Japan, Tahiti, and the South Pacific.

### Royal Caribbean International

Royal Caribbean International has long been a leader in the contemporary cruise line category. They continue to build new ships, yet continually update all their ships to make sure their guest-favorite experiences are onboard. In 1988, Royal Caribbean’s Sovereign of the Seas, was the first ship to offer a multi-level lobby. Then came other features on their next ships-dome-covered pool areas, in addition to the regular outdoor pools, and two-level dining rooms. New innovations continued, from ice skating rinks, rock climbing, miniature golf, and atrium view staterooms to the cruise industry’s first Flowrider surfing simulator and zip lining. The debut of Quantum of the Seas in November 2014 included even more firsts. “Dynamic Dining” has completely changed the dining experience. Main dining restaurants have been replaced with five different complimentary dining experiences, each handling a maximum of just 435 guests or less. Guests enjoy more flexibility, yet have additional options, including seven different specialty restaurants. Fun technology continues with Quantum of the Seas using wrist bands instead of key cards.

Their ships sail to the Caribbean, Alaska, Bermuda, Bahamas, Asia, Australia, Europe, New Zealand, Hawaii, Mexico, Panama Canal, and Canada/New England and South America.

### Holland America Line

Holland America Line lets guests enjoy the pleasure of sailing on mid-size ships that are elegant and uncrowded with unique onboard experiences. The ships have long been characterized by attentive dining room service and understated elegance. The first “Signature of Excellence” initiative launched in 2003 included enhancements - accommodation features like the Mariner Dream Bed, flat-screen TVs and special dining enhancements like the Pinnacle Grill. The Exploration Café, powered by The New York Times and the groundbreaking Culinary Arts Center, were also added. The Culinary Arts Center includes an innovative show kitchen where guests could enjoy cooking demonstrations. And the exclusive Greenhouse Spa & Salon was added. The “Signature of Excellence” initiatives continue.

Holland America Line covers the world, best known for Alaska and the Yukon, they also sail to the Caribbean, Panama Canal, Trans-Atlantic, Europe, Far East, Hawaii, Mexico, South America, Antarctica Canada/ New England, Asia and Pacific, Australia, and Pacific Northwest.

### Celebrity Cruises

Celebrity Cruises is characterized by a bit more refined cruise experience, European-style service, expansive staterooms, the largest spas afloat and cuisine that has been critically acclaimed. Exceptional dining was one of Celebrity’s early strengths, thanks to Master Chef Michel Roux, a well-recognized French chef who designed all of Celebrity’s menus and train staff, with a partnership that lasted until 2007. Celebrity Cruises has taken cuisine to new levels with menus crafted by a James Beard-featured chef. Celebrity was the first cruise line to have real grass at sea with their inviting Lawn Club area. A

specialty dining restaurant, The Lawn Club Grill is featured on some of their ships. Guests staying in the special AquaClass staterooms and suites have complimentary access to the Persian Garden and Relaxation Room, as well as dining at Blu. And Celebrity has a Concierge class with verandah staterooms. Celebrity ships also feature martini bars, champagne bars, a wide range of specialty restaurants, main restaurant, cafes and casual dining. Celebrity Select Dining provides more flexibility.

Celebrity Cruises offers sailings to Alaska, the Caribbean, Europe, Hawaii and Pacific Islands, Mexico, Panama Canal, Asia, Australia and New Zealand, Canada, and New England, Mediterranean and South America. The Celebrity Xpedition cruises to the Galapagos.

### Oceania Cruises

Formed in 2002, Oceania Cruises was designed to offer an onboard experience to emulate the casual elegance of a country club and offer outstanding cuisine, with destination-oriented itineraries. Renowned chef Jacques Pepin has created their gourmet culinary program. Oceania has the acclaimed Canyon Ranch SpaClub onboard, and their mid-size ships feature large-ship amenities. The Prestige Tranquility Bed is an Oceania Cruises exclusive, and they have gourmet restaurants on their ships. Their Bon Appétit Culinary Center is the first complete hands-on cooking school at sea.

A leader in destination cruising, Oceana sails to Europe, Asia, South Pacific, Caribbean and Panama Canal, Australia, Alaska, Africa, and New England and Canada.

### Azamara Club Cruises

Launched in 2007 by Celebrity Cruises, Azamara Cruises was developed to appeal to the upscale, small-ship traveler who enjoys sailing to exclusive destinations. The Azamara Journey and the Azamara Quest are elegantly designed and intimate. These ships also feature butler service as well as concierge-type amenities. In addition, Azamara Club Cruises' ships each offer two specialty restaurants at no charge to their guests in addition to a main dining room with open seating and other dining options.

Known for their "Destination Immersion," Azamara Club Cruises has numerous overnight stays, offering itineraries throughout the world.

### Crystal Cruises

What makes Crystal Cruises' fleet unique is their size when compared to other luxury brands. Crystal's ships tend to be more mid-sized and offer high standards as far as personal service, appeal to more sophisticated passengers, have advanced technology and offer more unique itineraries. In 2014 Crystal Cruises launched a menu concept that includes a new nightly dining experience in their main dining rooms with more than 100 new dishes. The Crystal Dining Room includes two menus, "Modern" and "Classic." The addition of their new Outdoor Fitness Garden as well as other upgrades bring new options for guests. Gratuities and all liquors are included in the fare. Their itineraries are worldwide.

### Cunard

Continuing with a tradition that began back in 1840, Cunard Line is one of the more recognized brand names in the cruise industry, and proudly offers "The Most Famous Ocean Liners in the World." When the Queen Mary 2, entered service in 2004, she was one of the most expensive ships ever built, at a cost of over \$800 million. She was carefully designed to offer several firsts, including the first Canyon Ranch Spa at sea and Todd English Restaurant. In 2007 the Queen Victoria entered service and then came the

Queen Elizabeth in 2010. She was christened by Her Majesty the Queen, Queen Elizabeth II. Known for gourmet cuisine, as well as a reputation for personalized service, luxurious accommodations and attention to detail, the ocean liners in the Cunard fleet offer exotic and extensive cruise itineraries including transatlantic crossings and world cruises.

### Regent Seven Seas Cruises

Known for destinations and diverse itineraries, Regent Seven Seas Cruises prides itself on offering an unregimented luxury cruise experience to well-traveled guests on their four ships. Regent Seven Seas Cruises' ships are also known for offer amenities normally found only on larger ocean liners and provide destination-intensive cruises. Guests enjoy concierge amenities, with up to four gourmet restaurants, along with diverse entertainment and an elegant casual dress code. Guests also enjoy free unlimited shore excursions, along with unique enrichment programs. The ships have Canyon Ranch SpaClub® and sail to more than 250 ports throughout the world.

### Silversea

Silversea Cruises is one of the few cruise lines that offers a complete "all-inclusive" cruise product. No tipping is required, and open seating dining options offer guests the opportunity to dine when, where, and with whom they desire. Their fleet includes the Silver Cloud, Silver Wind, Silver Shadow, Silver Whisper, Silver Spirit and they also have three purpose-built expedition ships - Silver Galapagos, Silver Discover and Silver Explorer. They offer an interesting variety of onboard programming for guests that concentrate on art, cooking, architecture, and culture. The ships' small size allows them to navigate and explore smaller harbors. Built and designed for the "ultra-luxury" market, Silversea Cruises has won countless awards and is recognized as the "defining elite luxury experience."

### Virgin Voyages

for clients who seek curated Adult-by-Design experiences for those 18-years and older. They style themselves as highbrow meets lowbrow. Where grit meets glam. They've ditched buffets and pre-set dining times to bring your clients fresh flavors and unexpected pairings with made-to-order food from 20+ unique eateries—all included. They offer longer stays and overnights at ports, and diverse entertainment and dining experiences. Plus, their voyages always include over \$600 in extras, like dining at 20+ unique eateries, WiFi, group fitness classes, tips, and essential drinks. Lastly, they've prioritized technology and sustainability all around; tinted windows, LED lighting, eco-sensors, and thoughtfully sourced materials are just a few of the design choices that help their ship use less energy, without sacrificing style.

## River Cruising

The river cruise industry has gone through explosive growth in the last few decades, providing even more options for river cruising, and is very lucrative for travel advisors. The number of ships has increased by 210% with the top 8 river cruise line companies and has seen an estimated increase of over 300% in passenger growth since 2011.

With river cruising, you're never far from shore which offers safety and peace of mind, and access to unique ports and river towns not accessible by large cruise ships. The smaller vessels can often dock right in the heart of these towns, and many provide an all-inclusive way to explore a destination. Guests have a wide range of dining options at no additional charge, along with complimentary specialty coffees, wine, beer, and soft drinks. Culinary experiences will vary and are usually reflective of local cuisine. Many river cruises also offer cooking classes! While large Broadway scale shows are not the norm on a river cruise, the cruise will offer unique tours and activities daily, like hiking tours, bicycle tours, and specialty experiences and excursions like wine tasting, cooking classes, and more.

It's important to realize that not all river cruises are the same, and that "luxury," is a subjective term. It's important to qualify your client to determine what kind of experience they're expecting. Clients who are a fit for river cruising generally want a more immersive experience in the culture, history, and cuisine of the destination. Consider offering river cruising to past clients who may want to revisit a destination or those who want a more unique or personalized experience over ocean cruising.

**Important:** Weather related factors can cause disruptions to river cruises. For example, bridges can pose a navigational obstacle if the water level is too high, or droughts can cause water levels to dip too low to accommodate the ship. Typically, September, early October, and the last three weeks of May have less water level related disruptions.

Some major rivers around the world that offer river cruising

- **EUROPE:**
  - ◆ Austria-Danube
  - ◆ France-Seine, Rhone, Saone, Dordogne, Garonne, Gironde
  - ◆ Germany- Moselle, Elbe, Main, Rhine
  - ◆ Portugal- Douro
  - ◆ Italy- Po
- **ASIA:** Irrawaddy, Ganges, Mekong, Yangtze, Li
- **NORTH AMERICA:** Columbia, Cumberland, Mississippi, Ohio, Snake, Tennessee
- **SOUTH AMERICA:** Amazon, Marañon, Ucayali, Magdalena
- **AFRICA:** Zambezi, Chobe, Nile
- **RUSSIA:** Neva, Svir, Volga (not as common recently due to conflict)

## Popular times to cruise

- ❖ Tulip time in The Netherlands and Belgium
- ❖ June in Provence to see the lavender fields
- ❖ Summer multi-generational vacations throughout Europe
- ❖ Christmas markets in late November and December
- ❖ Southwest Asia in the late fall through winter months
- ❖ March through November in Africa (milder than their summer months)

**Tip:** Offer pre or post day stays. Many clients will arrive at their destination early in the morning, but accommodation will not be ready until the afternoon. Consider having your client arrive one or two days early to acclimate to the time difference, and in case of any travel-related delays.

## Meet the vendors

### Avalon Waterways

Avalon Waterways began its first operating season in 2004 and is a part of the Globus family of brands, a worldwide leader in escorted tours. Avalon Waterways' ships cruise throughout Europe's waterways in conjunction with Globus land packages. In addition, Avalon Waterways has an English-speaking crew, and the line was designed more specifically for the North American market. Itineraries include Europe, Asia, and South America, they also have special themed cruises

### AMA Waterways

Ama Waterways was created in 2002 by cruise industry veteran Rudi Schreiner and Jim Murphy, the former owner, and CEO of Brendan Worldwide Vacations. On cruises designed for the English-speaking market, guests can enjoy complimentary wine, beer, and soda with dinner as well as complimentary cappuccinos and espressos with every meal. They offer river cruises in Europe, Vietnam & Cambodia (Mekong River), Africa and Myanmar (Burma.)

### Uniworld

Uniworld Boutique River Cruise Collection provides intimate, boutique-style river cruise ships that feature beautifully appointed river view staterooms and have professionally trained, all English-speaking staff. They also include custom-blended shore excursions hosted by English speaking guides. Some additional features – complimentary transfers are included on the day of arrival and departure for all of their cruises and tours. In addition, guests enjoy complimentary wine with dinner, 24-hour specialty coffees including cappuccinos and lattes as well as bottled water in each stateroom. Uniworld offers river cruising in Europe, Russia, Egypt, China, and India, as well as Vietnam & Cambodia.

### Viking Cruises

First established in 1997 by Torstein Hagen, Viking Cruises (formerly known as Viking River Cruises) has deluxe vessels sailing the river waterways of Europe, Russia, and Egypt as well as China and Southeast

Asia. With rapid expansion, they've become the world's largest river cruise line. Their vessels are floating hotels, surrounded by the highest form of traditional European hospitality. Itineraries are exclusively designed to provide travelers with comprehensive sightseeing opportunities, late evenings, and overnight stays.

### Scenic Cruises

Scenic Cruises provides a true luxury river cruise experience. Their 12 "Space-ships" sail on the waterways of Europe and Russia. Intimate, and all-inclusive, the "Space-ships" include up to six different dining venues, all drinks, prepaid gratuities and free WiFi throughout the ships. All shore excursions are included at no additional charge. Scenic Cruises has been expanding their efforts to reach out to the U.S. market.

### Tauck

Although well known for their tour offerings, Tauck also has its own branded line of river cruise ships in Europe. Their cruises sail on the Rhine, Main, Danube, Rhone, and Moselle rivers. Tauck also includes dining ashore and provides exclusive cultural experiences. The river ships have no more than 130 guests, and Tauck provides an all-inclusive experience, from shore excursions, gratuities and dining to premium spirits, beer, and wine.

### Collette

Like Tauck, Collette is known for their tour offerings but also offers river cruising options. Climb aboard for a slower, more intimate way to explore the world. These adventures, on small 4-star vessels, are a scenic and relaxing way to travel through the world's beautiful waterways. Plus, many other tours now have on-ship stays, whether it's exploring Nordic fjords or taking a privately chartered yacht to the Galapagos.

### American Queen Voyages

Relatively new to the river cruise industry is American Queen Voyages, which started in 2012. They operate two paddlewheel steamboats. The American Queen cruises on the Upper and Lower Mississippi River as well as the Ohio and Tennessee rivers. The American Empress, introduced in 2012, sails between Portland, Oregon and Clarkston, Washington. Guests enjoy a complimentary shore excursion in each area they visit. There are multiple specialty dining venues at no additional charge, along with complimentary bottled water and soft drinks, as well as wine and beer with dinner. Themed cruises are offered throughout the year.

## Wrap Up & Next Steps

The cruise business is growing and perhaps the perfect choice for your group travelers. Not only do they provide tremendous group gathering opportunities, numerous options to experience and relax, allows your group members to try new things and conveniently visit wonderful destinations throughout the world, but they provide pampering and comfort. Knowing what to expect in advance without unexpected surprises, the nearly all-inclusive pricing and plenty of time for individual exploration and growth make group cruising a wonderful experience. With so many choices now available there has never been a better time to think about organizing a group cruise trip. And cruise lines want your

business! Learning the basics of the cruise business is a good start because cruises are a great way for your group to travel together.



# Tours

## Tour/Vacation Package

A tour, or “vacation package,” offers a combination of arrangements that are purchased in advance as a single unit and can include any combination or variation of travel products like rail tickets, car rentals, transfers, air, hotels, sightseeing tours, etc. The terms “tour wholesalers,” and “tour operator,” are often used interchangeably. These are the suppliers that assemble the components of the package, such as airfare and hotels, but they also operate tour aspects like the vehicles used for travel or employing personnel to operate an escorted tour. Examples of tour wholesalers that offer vacation packages are, Travel Impressions, Delta Vacations, or Pleasant Holidays.

Tours offer key benefits over other types of vacations like:

- **Easy budgeting:** tours are prepaid and additional costs are easily calculated or budgeted in advance. This means they are good for travelers on a budget.
- **Savings:** Tour operators negotiate prices and discounts with suppliers. This means that ready-made or prepackaged tours are generally less expensive than if the traveler bought each element of the tour separately.
- **Guaranteed entrance:** tour operators reserve a block of tickets to events and attractions in advance in order to insure travelers gain access to them. Individual travelers may not be able to gain access to the same attractions as those in tours. Tour participants may also avoid long lines or waiting times because of these reservations.
- **Security:** All elements of the tour are chosen with safety of the traveler in mind.

5 Components of a Vacation Package:

1. **TRANSPORTATION:** Air travel, transfers, group transport, etc.
2. **ACCOMMODATION:** Hotel or other lodging.
3. **ITINERARY:** This is the schedule. It will include the number of stops, travel time, leisure time, etc.
4. **MEALS:** The number of meals included and where they’re taking place.
5. **“OTHER”:** Sightseeing, special events, activities, etc.

Vacation Package Types

1. Custom-designed or "Foreign Independent Travel " (FIT): These can be international or domestic, so don't let the term "foreign" in FIT confuse you. These are custom made independent vacation packages that usually include airfare, hotel, transportation to and from airport and resort that are put together by an agent. These are not guided tours. Because they are custom designed to a traveler’s unique needs, dates, interests, and specifications, they are generally more expensive than ready-made tours and do not receive volume discounts. Think of them like custom made clothing versus something off the rack. As FITs become more popular,

more and more suppliers offer dynamic packaging, which is the ability to quickly put together a travel packaging involving multiple components from a variety of sources and offer them at a single price. Examples of vendors that offer FITs are Avanti Destinations, Travel Impressions, or Delta Vacations.

2. **Guided/Escorted Tour:** This is what most people think of when you see the word “tour.” These are structured itineraries put together by the tour wholesaler for groups that are accompanied by a “tour escort,” or “tour guide.” These generally include sightseeing, some meals, transport, and accommodations. Escorted tours offer convenience, guidance, and security for travelers. Examples of vendors that offer escorted tours are G adventures, Globus, and Trafalgar. Be sure to know the difference of “visit” and “see” when reading the description of the tour itinerary. Your clients will not be happy with you if they find out that they are not allowed time to “visit” (go inside) a particular site when their tour only drove past it (see).
3. **Convention Package:** These are designed for those attending a convention or trade show.
4. **Affinity Groups:** These are for people who share a similar interest or belong to the same group or club.
5. **Incentive Group:** These are given by companies as rewards or prizes for their employees.
6. **Special Interest Tours:** Tours designed around one particular interest in a specific topic or activity like food or wine, nature, religion, history, art, etc. A type of special interest tour that is becoming more popular is ecotours, which is tourism that involves visiting scenic or remote natural area and attempting to minimize negative impacts on the local environment and inhabitants. Another type of special interest touring includes adventure tours, which center around sports or physical activities like hiking, camping, kayaking, etc. An example of a vendor that offers adventure tours is G Adventures.

### Pros and Cons of an Escorted Tour

PROS	CONS
<b>SECURITY:</b> The guide knows the destination well and is likely familiar of safe areas and practices.	<b>TRAVELING WITH PEOPLE YOU DON'T KNOW:</b> Be sure you qualify your client to determine if they prefer traveling by themselves or with a group.
<b>LESS STRESS:</b> The trip is pre-planned. Your clients don't need to worry about getting lost, figure out how to get to the next city, or where the nearest restaurant is. The tour guide is there to handle all the details and answer questions.	<b>LESS FREEDOM FOR THE INDEPENDENT TRAVELER:</b> You're on a regimented schedule.
<b>EXPERTISE:</b> The tour guide has local knowledge that can really increase the value of the trip.	
<b>SOCIALIZE:</b> You get to socialize and meet new people while you're with the group, so you can make new friends!	
<b>EASY BUDGETING:</b> Escorted tours have detailed itineraries. Your clients will know the types of	

hotels they're staying at, the number of meals and excursions included, so it allows the client to budget accordingly.	
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## Itinerary Types

- **CIRCLE ITINERARY:** It begins and ends in the same location.
- **OPEN-JAW ITINERARY:** It begins and ends in different locations.
- **HUB-AND-SPOKE ITINERARY:** Travelers have a “home base,” in one location, and travel out to others, but return to the same hub. The hub-and-spoke itinerary is great if there are a lot of things to see in a relatively small geographic area.

## Price

Tours are usually priced per person as double occupancy, which means that each person pays this price when sharing a room with another person. Single occupancy prices are higher and pay an additional fee called a single supplement. Some tours will try to pair a single traveler with a roommate, but the operator cannot guarantee a roommate. If no roommate is found for the single traveler, the traveler will pay the single supplement fee which is then referred to as a forced single in this instance. Some vendors will not charge the single supplement fee if they are not able to pair you up with a roommate. G Adventures does not charge you if they are not able to pair you with a roommate.

## How to Begin

Be sure to qualify your clients and work with them to put together a tour or vacation package that meets their expectations and requirements. If you have questions while putting together the tour or vacation package, ask the supplier! They want to help you sell their travel products, so don't be afraid to give them a call. The primary things are to ensure your clients understand the itinerary details, what is and is not included (How many meals- if any- are included? What is optional vs. suggested? Are tips included?), deposit and payment schedule, and knows the policies and procedures including the cancellation policy.

A cancellation policy not only goes over what penalties or fees a traveler is liable for if they cancel their trip, but also if a tour operator cancels some or all elements of the trip. Tour operators reserve the right to cancel a tour before departure. This could be due to weather, political events, social conditions etc. Escorted tours may also be cancelled if there are an insufficient number of participants. In most cases the tour operator will refund the traveler of the portions on the tour that were cancelled, or substitute tour elements without notice. If the quality or value of the substitution is less than the price of the original tour element, the client will receive a refund of the difference in price. It is important to review the cancellation policy with your client, so they understand these details well in advance.

The best way to start understanding tours and vacation packages will be to take the training provided by the travel wholesalers like Delta Vacations, Travel Impressions, Trafalgar Tours etc., located on their website. Remember, always start with our preferred vendors first. You will find information about the vendors we work with, and instructions on how to work with each vendor, on your Vendor List located on your Xstream Agent Hub. Never register directly with any vendor before checking your vendor list for

registration instructions. If you register incorrectly, it will affect your commission. Keep in mind, some vendors require that Xstream Travel register you under our agency for you to receive commission. So always check your Vendor List!

### The Benefits of Selling Tours

- ❖ **EASE:** All aspects of the tour are generally purchased from a single tour operator, making the booking easier to manage and sell than if all components were purchased individually.
- ❖ **HIGHER COMMISSIONS:** Xstream's preferred vendors offer higher commission percentages than other vendors due to the special relationships with have with these vendors. You should always check your vendor list for preferred vendors first.
- ❖ **KNOWLEDGEABLE STAFF:** From the employees at the destination to the tour operator, these people know their destination. They can provide advice on attractions, entertainment, climate, culture, current events, etc.

## Accommodations

“Accommodations,” in the travel industry generally means a place to sleep. Other terms for this industry are lodging, hospitality, and hotel industry. Not only is this industry one of the oldest, but it also employs the most people. It is also closely linked and has evolved alongside the transportation industry. Anywhere people go away from home, they will need a place to stay while they’re there. This is especially true after the creation of the interstate highway system in the 1950’s when travelers needed lodging more convenient than downtown hotels, and thus the motel industry boomed to meet that need.

There are different types of accommodations that provide different amenities and advantages based on your clients' needs. Giving good advice can be challenging because accommodations vary tremendously and judgments about accommodations are usually subjective. Travelers often have their own subjective expectations that can be hard to define let alone meet. A good first step in learning to evaluate accommodations is to become familiar with the different types.

### Types of Accommodation

Type	Definition	Example
<b>Airport Hotel</b>	Located near or on airport property. Convenient for travelers leaving on early morning flights, or that don’t need to go downtown.	Hyatt Regency DFW International Airport
<b>Convention Hotel</b>	Located near or inside convention or expo centers. Cater to business travelers or groups that do not need to leave the property.	New Orleans Downtown Marriott at the Convention Center
<b>Motel</b>	Basic lodging with very few amenities that cater to road trippers and motorists	Motel 6
<b>Extended stay hotels</b>	Equipped to house people for a few weeks or months at a time.	Embassy Suites
<b>Villas/condos</b>	Full apartment-style accommodations. Usually have a separate sleeping and living area, and come equipped with a kitchen.	Generally privately owned
<b>Youth Hostel</b>	Dorm-like accommodations for youth and young adults. Rent by bed and share community style bathrooms and living	Hostel van Gogh in Amsterdam

	areas. Some separate men and women into different sleeping areas.	
<b>Bed and Breakfast (B&amp;B)</b>	Generally a privately owned and operated small establishment or house that offers private rooms and usually offer breakfast in the morning. Good for travelers that want unique lodging that offer a taste of local life.	Swallow B&B in Galway city, Ireland
<b>Inn</b>	Offer hotel-like amenities while still showcasing local charm	Fredericksburg Inn and Suites in Fredericksburg, Texas
<b>Resort</b>	Usually first-class accommodation with entertainment and/or activities. These are vacation destinations in themselves.	Horseshoe Bay Resort in Horseshoe Bay, Texas
<b>All-inclusive resort</b>	These are resorts that offer meals, lodgings, beverages, activities and sports all for one all-inclusive price.	Excellence Punta Cana in the Dominican Republic
<b>Spa</b>	Resort that emphasizes health and well-being	Canyon Ranch

Rating system

Some countries have their own formal rating system. The US does not, but there are reference books that publish their own rating system like the Official Hotel Guide or OHG, the Five Diamond rating system from AAA guidebooks, or the five-star rating system from the Mobil Travel Guide.

The most well-known informal rating system of hotels is TripAdvisor. TripAdvisor allows for reviews of accommodations as well as restaurant and activities. Anyone can access this review as long as you have the Internet, and a lot of businesses use TripAdvisor as their own system for feedback from customers.

Price Categories of Hotels

<i>Budget</i>	Few amenities, small lobby, basic rooms, and limited space. An example is Motel 6.
<i>Economy</i>	slightly upgraded with more amenities such as a pool, better décor, larger rooms and maybe breakfast. Some examples of this are Super 8, Fairfield Inn, Travelodge, or Red Roof Inn

<i>Budget luxury</i>	Slightly upgraded from economy, with most offering larger furniture, more space in rooms, more likely to have amenities such as toiletries and outdoor swimming pools. Most likely they would offer a continental breakfast. Some examples of these are Comfort Inn and Hampton Inn
<i>Mid-priced</i>	Most offer a restaurant, large lobby with lounges and a bar, room service available as well as a 24-hour desk attendant to assist with needs. Usually easily accessible to large meeting venues or conference centers. Some examples of these are Quality Inn, Holiday Inn and Courtyard Inn
<i>First class</i>	Updated furnishings and designs throughout the lobby and rooms, offer bars, restaurants, concierge, indoor swimming, 24-hour gym facilities and room service. Some examples of first-class accommodations are Hyatt, Hilton, Marriott, Sheraton, and Embassy Suites
<i>Luxury</i>	Incredible service and ornately decorated, these hotels are known for their tasteful elegance. Health clubs, five-star restaurants, spas, concierge service and incredibly high-quality furnishings are the norm. Some examples of a luxury accommodation are St Regis, Fairmont, Ritz-Carlton and the Four Seasons

## Rate Changes

There are many factors that determine the price of a room, and that price fluctuates depending on several different factors including weather/seasons, demand, day of the week, etc.

### What Affects the Price?

- **LOCATION** (of hotel): Where the hotel is located and where it is within the city will affect its price. A hotel located in Reno, Nevada will be cheaper than a hotel in Las Vegas, Nevada. A hotel located in the middle of a city near an airport or near activities or entertainment (think conventions centers or theme parks) will be more expensive than a hotel located on the city's edge.
- **LOCATION** (of the room): The location of the room within a hotel determines price as well. A room with a nice view -or- is located near the lobby -or- the pool, may be more expensive than rooms located on the far end of the building.
- **LENGTH OF STAY**: Not only how long a traveler will stay but also the duration. Some hotels offer discounts for long stays or have different pricing for day rates (those not sleeping overnight. Common for businesspeople, or people who need to stay longer after checkout).
- **DAY AND SEASON**: This is based on demand. You should always check when the peak season (the busiest time of year) is for a destination. Demand can also be higher on certain days of the week. For example, weekends may be pricier at resorts which have weekend travelers, but some hotels that cater to business travelers may be higher priced during the week. New York City is a prime example.
- **FURNISHINGS**: Some rooms are more updated than others and may have better technology or better décor.
- **ROOM SIZE**
- **OCCUPANCY**: Hotel rooms are usually designed for two people, meaning double occupancy. Many hotels charge the same amount for a single occupancy as a double.
- **MEALS AND MEAL PLANS**: There are a few different meal types

- ◆ European plan or EP: No meals are included.
- ◆ Continental plan or CP: Light or continental breakfast included.
- ◆ All-inclusive or AI: All three meals included and sometimes drinks as well.
- **CURRENCY VALUE:** The currency exchange rate on the day of payment. If your client is traveling to another country, they should be aware that the exchange rate could change by the time they pay for the room if not already pre-paid.
- **SPECIAL FEATURES:** Any unique or upscale amenity that can add to the price of your room.
- **SPECIAL RATES:** Rates for certain circumstances like special rates for frequent guests, or a group rate for a large number of people staying who have booked a group of rooms together.

## How to Begin

1. **Qualify:** First, be sure to qualify your clients and work with them to assess their expectations and requirements. What's the purpose of the trip? Are they on vacation, visiting family, or there for business? What's the client's budget? Do they really care about an ocean view, pool, continental breakfast, or in-room wifi? Do they need a room near the elevator or on the ground floor due to mobility issues? Make sure to ask questions to find out!
2. **Get Booking Info:** You will also need basic information to book like the dates the client will be staying, the time they will arrive, the names of all travelers, number of people staying, how many people and beds per room, the ages of all travelers (this is especially important if you're dealing with children or seniors because they could be eligible for a discount), the type of room, any membership to clubs that your clients may have that can get them some special rate or add to their points in any way, or any special requests or requirements (smoking room, a non-smoking room, wheelchair accessible, etc.).
3. **Research:** Next, research! Use your resources to research different hotels. Filter out hotels based on the client's budget, the amenities they want, location, and compare ratings and reviews online. You can search by using one of the vendors located on your Vendor List in your Agent Hub, or search hotels directly online. Be sure to also offer any activities or other travel components your client may need with their stay (like hotel transfers, mobility aid rentals, car rentals, etc.).
4. **Quote:** Once you are ready to get a quote, depending on the destination and/or international stay and if this is a vacation trip or a 1 or 2-night stay, will determine if you should be booking through one of the vendors located on your Vendor List in your Agent Hub, or use one of the wholesale hotel only vendors like BedsOnline. If it is for an international resort or hotel, you should be using one of the vendors on the vendor list. Vendors can sometimes offer lower prices or rooms in otherwise sold-out hotels. Always check the preferred vendors first before using another vendor on your Vendor List. (Preferred vendors have a ribbon next to their name on the Vendor List)



5. Remember:

- Be sure to get a physically signed Credit Card Authorization Form (CCAuth Form) for each credit card being used. Your client will need to accept or decline trip protection/travel insurance on the form, so be sure you have offered it. Most wholesale vendors (like any of the suppliers in Vax) will have this as an option at the time of booking. You can provide the client with a link to details of the protection policy. They must either initial the CCAuth Form next to decline trip protection or pay for the policy with the booking and initial on the form they have accepted trip protection.
- Take note of all reservation information including payment schedule and cancellation policy, and provide this information to your client.
- Post your booking to your Booking Desk to ensure you're paid for your booking when the commission comes in to Xstream.

### Booking directly with a hotel vs. choosing a supplier from the Vendor List

It's always best to work with one of the suppliers on your Vendor List when you can. Xstream travel already has working relationships with the vendors on your Vendor List. This means we have access to special promotional pricing, higher commission percentages, and have set up a payment process to expedite your commission payment. The vendor may also provide additional services that are part of the vacation package that are not only commissionable, but easier for you to book for the client in one place (trip insurance, activities, air, etc). However, occasionally your client may request a specific hotel or resort that is not listed on your Vendor List or available on one of the hotel supplier sites (like Bedsonline, AIC Hotel Group, Marriott, etc). When this is the case, you may choose to work with a hotel directly.

**Important:** Promotional prices and commission percentages may differ, and the commission payment process may be different and take longer when booking directly with a hotel or resort.

## How to book directly with a hotel or resort

1. Like booking with any of the wholesale vendors or suppliers on your Vendor List, you will qualify your client and get their booking information. Then you will begin the research process after first looking into the vendors on your Vendor List.
2. Next, contact the hotel directly and identify yourself as a travel agent with the host agency Xstream Travel and give them Xstream Travel's IATA 45609642 (Xstream's company information is located on the Vendor List located on the Xstream Agent Hub under the Tools tab). The vendor will let the agent know if verification is required for the agent, or if they need additional information to set up an agency account for Xstream. If you need assistance, please submit a help desk/support ticket from your Xstream Agent Hub so we can forward this information to the hotel.

3. Then, mention any current promotions to the hotel that you found online, and make sure the promotion is for a commissionable rate before booking. It is as simple as asking, “Is this promotion offered as a commissionable rate to travel advisors?” If yes, get a quote and send it to your client. Agents are encouraged to log into their Travelsavers account frequently for current Partner of the Month promotions or check the [Travelsavers Promotions Archive](#).
4. When your client is ready to book, be sure to get a physically signed Credit Card Authorization Form from your client. It must indicate if they have accepted or refused trip/travel protection. Many hotels will not offer an insurance policy directly, so you will need to choose a travel insurance vendor from your Vendor List and offer your client a quote based on their trip information.

**Remember:** You are a travel advisor, not a licensed insurance agent. You can suggest and offer policies to your clients, but it is in your best interest to not actively sell the policy. Give your clients the full policy for them to read and review. If the client wants clarification or more information on the policy, they should be referred to the insurance company directly. The travel insurance representative will explain the policy to the client and ensure you are credited with the sale.

5. After the client has signed the CCAuth Form and accepted or declined a trip protection policy, you will gather payment information from your client and provide the information to the hotel. Give your client any confirmation documents received, as well as information on the cancellation policy, their trip protection policy and contact details for their insurance provider.
6. Post your booking to your Booking Desk. You may also need to post the insurance policy number, or any other activities booked separately on your Booking Desk. Remember, when booking multiple travel components through different vendors, you will need to post each component separately to your Booking Desk to be paid.
7. After your client travels, contact the hotel to collect your commission.
  - They may have an automatic payment system through a third-party payment processor like TACS or ONYX. If this is the case, no further action is needed by you. Xstream will receive your commission directly once it's issued.
  - If the hotel does not work with a third-party processor, they may request an invoice. A sample hotel invoice is provided for you on your Xstream Agent Hub under Forms & Documents. If the hotel requests a W9 from Xstream, please submit a Help Desk ticket from your Xstream Agent Hub and provide us with the confirmation number, dates of stay, and guest name or group name for your booking. We will then email the hotel directly with our W9.
  - Xstream will post your commission as soon as it is received from the vendor.

## Booking for Groups

Booking a group hotel reservation is similar to individual bookings in some ways but there are some differences. Hotels may have a separate department for groups, so be sure to ask. You may also have to make your reservation more in advance if you have a large number of travelers. You can usually book

one or more rooms with one name. If you have more than one room and want separate reservations, book separately and get a Credit Card Authorization Form for each. Be sure to find out if your clients need adjoining rooms (hotel rooms located next to each other) or connecting rooms (hotel rooms that are next to each other that are linked by a door between them). Again, if this group is for an international destination or Hawaii, you will need to book it using one of the preferred vendors. If you have a group that is needing 10 or more rooms at a hotel in the Continental U.S., you may call the hotel to block group space for them. Be sure when you receive the contract that you pay close attention to if there are any attrition penalties and any cancellation dates that you need to be aware of.

### Hold Time

This is the deadline for holding a hotel without payment or deposit. In order for the reservation to be secured, the traveler needs to arrive by the hold time, whatever the hold time is for that hotel. If they do not, the reservation is canceled. If the traveler shows up wanting their room after the hold time, the hotel has no obligation to fulfill their reservation.

### Guaranteed for Late Arrival

If you give a deposit or credit card, the reservation is guaranteed, and the traveler can come at any time. An exception to this is overbooking. Like airlines, hotels overbook their rooms. When this happens, there's something called 'walking the guest'. This is when a confirmed or guaranteed guest is given nearby accommodation of equal or better value to their overbooked hotel. This doesn't happen often, but it does happen. Bookings made on websites like Expedia, Priceline, Travelocity, etc. are well known for this happening. This is why booking with a wholesaler is always the best option. E.g. Pleasant Holidays, Avanti, etc.

### Cancellation Policy

Most hotels have no penalties for cancellations until a certain date. Then there are penalties, and they are all different. This policy MUST be given to your client. If your client does cancel, the hotel will give you a cancellation number which you must keep for your records in case of any issues or charges.

# Air Travel

**Important:** Before we get into flights and booking air tickets you need to know that booking air only is a huge liability to agents, and we do not recommend booking air only reservations unless it's for someone that you know personally (family or close friend). No matter who it's for, **always** get a Credit Card Authorization Form for the booking.

## History

Prior to 1978, the US airline industry was controlled by the government. The Airline Deregulation Act gave the airlines the chance to determine their own fares, commissions and routes. This changed a lot for the airline industry, and this deregulation has pros and it has cons. One of the obvious cons for us as travel agents is the airlines cut the commission they were paying to travel agencies. For passengers it meant there were more options, which is great for bargain hunters, but that also means there are hundreds of different published fares for the same flight. The prices for fares can even change hourly making choosing a flight much more difficult.

## Airport and airline codes

Every airline is assigned a two-letter code. For example, American Airlines is AA, Delta Airlines is DL, Air France is AF. Every airport in the world has a specific three-digit code used to identify it. For example, ORF for Norfolk International Airport, or DFW for Dallas Fort Worth International Airport. While it's not necessary to memorize all codes in the world, having a list handy will make booking flights faster and easier so you don't have to memorize airport codes but it is nice to know some really commonly used ones. You don't want to use the wrong one as there are many cities with airports around the world with the same name. For example, there's Manchester, New Hampshire, USA, airport code MHT. Manchester, England, airport code MAN. This would be two very different locations to send your clients to.

## Types of Airlines Service

### Passenger Service

- **CHARTER:** A flight that has been specially reserved by a vendor or wholesaler. Charter companies own or lease an entire plane or several seats, then resell the seats to the public at a lower price in conjunction with the resort as a vacation package.
- **SCHEDULED SERVICE:** Consists of flights that have designated routes that are published on the schedule by the airlines, and available for purchase for the public.
- **INTERNATIONAL LOW FARES:** These are done through Air Consolidators. Consolidators are distribution companies that negotiate contracts with many airlines so that they can sell discounted air tickets, which they then in turn sell to consumers directly or through travel agencies.

Most flights will also have three classes of service; First, business, and coach/economy. Many of the airlines have also started adding in economy plus and also economy basic. These are the most common,

but not uniform across every airline company. Each offers its own set of passenger benefits or advantages. Please check with the airline for more information about classes available, and a description of each.

## Types of Flights

- **NONSTOP FLIGHT:** There is no stop from the first destination to the second.
- **CONNECTING FLIGHT:** There is a stop where passengers change planes.
- **DIRECT FLIGHT:** There is a stop, but the passenger does not change planes.
- **ONE-WAY FLIGHT:** A flight from point A to point B with no returning flight.
- **ROUNDTRIP:** A flight from point A to point B, then point B back to Point A. You end up back at your original destination.
- **OPEN-JAW:** A trip in which an airline passenger flies in to one destination and returns from another. For example, you fly from Dallas to Chicago and spend a few nights there. Then you meet up with friends and rent a car and drive to Minneapolis. When you're finished with your trip you take a flight from Minneapolis back to Dallas. The trip is open-jaw because you did not fly back from Chicago. Dallas -> Chicago **Open-Jaw** Minneapolis -> Dallas.
- **MULTI-STOP:** A trip in which the final return flight is not to where the passenger started from. Essentially, they are one-way flights to multiple cities. This is common with clients who island hop in Hawaii or visiting multiple destinations in Europe, especially European cruises which start in one location and end in another.

**Helpful Tip:** Many people confuse direct flight and nonstop flight. At some point you will hear a client ask for a direct flight. They are probably asking for a non-stop flight. Be sure to check the flight schedule before you let your clients know that they have a non-stop when they really have a direct flight. Even though they do not get off the plane, it does take longer to get to their destination because of this stop.

## Baggage

Most airlines classify three different types of baggage; personal items, carry-ons, and checked baggage. A general rule of thumb with baggage is to check with the airline because their policies and regulations vary from airline to airline for what they charge and what is acceptable. Be sure to include the airline's web address in your documents that you give your clients and instruct them to check with the airline on baggage allowed and the cost.

1. **PERSONAL ITEM:** This is usually a small backpack, purse or briefcase. On most flights you can have one per person, and there is usually no charge for a personal item. Be sure to check with the airline as some of the discount no frills airlines charge for a personal item.
2. **CARRY-ON:** These bags are brought onto the plane with you and usually stored in the above seat storage areas. The average accepted size of a carry-on bag is 45 linear inches, this is the total length, width and height of the piece of luggage. It usually comes in the form of a 22 by 14 by 9

inch bag. Remember, the measurement is the total of the length, width and height so it can have different dimensions so as long as it's not over 45 linear inches. There are security regulations that determine the different items not allowed in a carry-on bags, like containers of liquid over 3.4 ounces, sharp objects, tools, sports equipment, guns and firearms. Be sure to check the airline's policy on charges associated to carry-on baggage. Not every airlines charges for a carry-on, but some do.

3. **CHECKED BAGS:** This is a larger bag you drop off at the kiosk before you go through security. Size and weight restrictions regarding checked baggage vary from airline to airline. Generally you will be allowed a certain weight and size maximum, after which you will be charged extra fees for transport. The number of bags allowed per person and the fees required to pay for extra bags varies with each airline.

## Travel Requirements

Be sure to check the travel requirements (including covid testing and vaccination requirements) to your client's destination country as well as any returning requirements to their home country. Check both countries' .gov embassy site for important updates. Another handy tool you can use is one provided by [Sherpa](#).

You can also view The U.S. Department of Transportation's new [Airline Customer Service Dashboard](#) to ensure your client has access to information about services that U.S. airlines provide to mitigate passenger inconveniences when the cause of a cancellation or delay was due to circumstances within the airline's control.

## Special Services

Be sure to check with your client about any needs or requirements while flying.

- If your client requires a special meal due to an allergy or ethical/religious requirement, this can be arranged online through the airline's website. Please do this at least 48 hours in advance. You can check the airline's website for type of meals and foods available.
- For clients with disabilities: Be aware of, and provide, the [TSA's rules](#) for travelers with disabilities and medical conditions to your clients. You can [request assistance from TSA through the TSA Cares](#) program online, or call (855) 787-2227 if your client's flight is within 72 hours. This program provides assistance to travelers with disabilities at airports.
- See also the [U.S. Department of Transportation's Disability Resource Center](#).
- For clients with sensory issues, research the airport to see if they have "sensory rooms." These are places for people to take refuge from sensory overload and decompress from the stressful atmosphere at the airport.
- For LGBTQIA+ travelers: They should visit the TSA website for information on how to [make a correction](#) on their passport, or [change their gender marker](#) if applicable. Please also provide [TSA's policy for transgender travelers](#) to your transgender clients. They'll also find additional information on knowing their rights and airport security through the [National Center for Transgender Equality](#).

For any other needs or requirements, please contact the airline directly

## Booking Air

We do book flights in conjunction with vacation packages or with cruises, however air only bookings (meaning not a part of a vacation package or cruise) are a huge liability and we at Xstream Travel do not recommend booking air only unless it is for you or someone that you know personally (family or close friend). Also, keep in mind that there's no built-in commission with air only travel, unlike booking vacation packages or cruises where the commission is built-in. You will need to add a service fee to get paid for making these bookings. The vendor will send the service fee to Xstream, and it will be posted to your booking as commission.

Like all bookings, you must get a signed Credit Card Authorization Form first before booking. The air consolidators we work with also require a copy of the client's ID and credit card. If your client does not want to provide these, then you cannot book the flight for them. You will also need to be sure you are following US government policies. You need to have the ticket holders exact name as it appears on their Driver's License or government issued ID, as well as their birth date. Air tickets are not changeable once ticketed. If you misspell your client's name, you will be responsible for having to pay the fees to purchase them another ticket. It's important to check, and then double check the information is correct.

Once you purchase the ticket, you will receive an email receipt from the airline or the air consolidator you booked with and then another email with an e-ticket (electronic ticket). Make sure your confirmation has a ticket number. This is a 12-15 digit number. The confirmation number/record locator is not a ticket number. **No reservation is actually confirmed and booked until you have a ticket number.** Be sure to instruct your client to check in early. Most airlines allow you to check in 24hrs in advance of your flight take off time. This can be done online, via phone app, or at the ticket counter at the airport, just be sure to get their early. The client can retrieve their boarding pass when they check in.

Occasionally, a flight may be overbooked. This is when airlines sell more tickets than there are seats. If your client is bumped from a flight the airline will book them on the next available flight and compensate the client for their time. It's good to know that airlines are not required to compensate for flight delays and cancellations, however they will try to get the passenger on the next available flight.

Lastly, air tickets are non-refundable. If a client needs to cancel their ticket, they will not get a refund. Air tickets are good for up to 1yr from date of purchase, and the client is responsible for paying the change fees to purchase a new ticket and any additional amount if the new ticket is a higher cost than their previous ticket.

# Ground Travel

## Train/Rail Travel

Traveling by train is a unique way to travel, and a vacation experience in and of itself, offering your clients a once in a lifetime experience to see new places and expansive countryside. Traveling by rail is a great alternative to flying and offers many benefits:

- Relaxed travel
- Allows for more spontaneity with your itinerary
- Usually cheaper than traveling by air. Also, a good alternative for those that prefer not to fly
- More baggage allowed per person
- Discounts for different age groups like children, youth that are 18-25 years old, or seniors
- Combines accommodation and transportation (when applicable)
- Includes ferries
- Domestic rail vacations are a great alternative to cruising for those who do not have a passport

## Passes Vs. Tickets

There are two options for rail-only travel; individual tickets for point-to-point travel, and rail passes.

1. **POINT-TO-POINT TICKETS:** Good for short distance travel, such as travel from city to city within a country, and good value if you plan to restrict your travel and are only going to one or two places.
2. **RAIL PASSES:** A rail pass will allow your client to hop off and on multiple times during their vacation. A good value if you plan to travel extensively throughout one or several countries, or if you plan to cover long distances. They can save your client money depending on the destination and duration of travel.

For example, if your client wants to travel from Venice, Italy to Rome, Italy, it's probably not worth it to get them a three-day unlimited Italy pass. However, if you have a client that wants to take a trip across Slovenia, it will probably be cheaper to get them a 3-8 day Eurail Slovenia Pass to travel any 3-8 days an unlimited amount of times and distance within a one month period.

**Important tip:** Most rail passes will get you on the train, but you will also need to make sure to tell your clients to reserve a seat. Reservations are necessary for all sleeping compartments and high-speed trains, and generally cost a fee.

Most countries and continents have a rail system within their borders. Here are just some examples of rail and rail vacation vendors:



## Alaska Railroad

The Alaska Railroad (ARRC) provides year-round rail transportation services throughout Southcentral and Interior Alaska, offering vacation packages and rail only. Routes traverse miles of remote and wild landscapes, safely bringing millions of tons of cargo and nearly a half-million passengers to railbelt destinations each year. The Alaska Railroad operates a regularly-scheduled public transportation service connecting Alaskans and visitors to communities from Seward to Fairbanks. Passengers gain access to remote regions and areas off the road system, and to public land treasures including the Chugach National Forest and Denali National Park, which are visited by hundreds of thousands of people annually.

## Amtrack

In the US there's Amtrak, which sells passes by days counting segments, and Amtrak Vacations. A travel segment is any time you get on and then get off a vehicle (train, bus, ferry or other allowable leg) regardless of length. **Please note: point to point Amtrak tickets do not pay commission.**

Pay particular attention to segments when purchasing rail passes for your clients, when direct routes are not available. For example, because there is no direct route from Washington, DC to Oklahoma, City, OK, if you want to travel from DC to Oklahoma City, you could ride the Capitol Limited train from Washington to Chicago (segment 1), then ride the Texas Eagle train from Chicago to Fort Worth (segment 2) and finally ride the Heartland Flyer train from Fort Worth to Oklahoma, City (segment 3). This journey from Washington to Oklahoma City would use three of your allowable segments.

Amtrak Vacations (sister company of Railbookers) has been the national tour operator for Amtrak since 2006 and provides hundreds of vacation packages to choose from. From quick weekend getaways to vacations 1,2, and 3 weeks long, all their itineraries are customizable and independent (not escorted). National Parks are the most popular, and their vacations include rail, hotel, sightseeing, and meals. **Amtrak Vacations does pay commission.**

## BritRail

A passenger rail system that allows travel between England, Scotland and Wales as well as some domestic ferries.

## Eurail

A passenger rail company that sells rail passes only, and services multiple European nations (not including Great Britain). Keep in mind, cars on trains can split and go in different directions, so keep your luggage with you and make sure you're in the right car.

## Grand Canyon Railway

The Grand Canyon Railway makes it easy for travel professionals to plan for their clients by providing a full-service reservation department, groups department, and packages that combine all the elements necessary for a rewarding Grand Canyon vacation including a stay at the Maswik Lodge North inside the park with the ease of one phone call. Explore multiple options to satisfy what your customers wish to see, the time they would like to invest and the level of service they desire to fulfill their Grand Canyon adventure.

## Rail Europe

A rail company within Europe that is only available for purchase within North America.

## Railbookers

Railbookers offers an ever-expanding portfolio of vacations to inspiring, sought-after destinations across Europe, the USA, Canada and beyond. Discover the joy of the journey, pass spectacular scenery and enjoy a hassle-free vacation. Choose from one of their expertly-planned, independent vacations –or- let one of their knowledgeable Rail Experts build your own tailor-made trip.

## Rocky Mountaineer

Rocky Mountaineer offers over 65 unique Canadian vacation packages and four distinctive rail routes through British Columbia, Alberta and the Pacific Northwest. Our world-renowned, luxury train travels by daylight through the wild beauty of Canada West and is the best way to experience the majestic Canadian Rockies.

## Trans-Siberian Railroad

The Trans-Siberian Railroad is the longest railroad in the world. It stretches from Moscow through Mongolia and into China, all the way to Beijing. The construction of this railroad was started by Tsar Alexander III and finished by Tsar Nicholas II. Traveling by train on specialty rail services offers something unique to your client — the chance to travel back in time. The historical Orient Express takes you across Europe in a train completely styled and decorated in the 1920s fashion. The Orient Express celebrates the past and how people traveled back in the 1920s.

## VIA Rail

The passenger train network of Canada and also some of the US.

## Yankee Holidays

Operates 3 travel brands, Amtrack Vacations, Railbookers, and Yankee Holidays. They are the largest independent rail vacation provider in the US, Canada, and Europe.

**Important tip:** Always have your ticket and passport ready (if traveling internationally) for inspection while riding the train. You could be asked at any time to show your travel documents.

## Rail Vacations

Rail vacations differ from rail as transportation only. Rail vacations combine and personalize a full vacation package around the train offering transportation, accommodation, entertainment (usually tours both on or off train, and off train excursions and activities), and meals. Think of them similar to land cruises.

Some packages will offer onboard sleeping accommodation, others will offer hotel stays at a destination as part of the package, and still others will offer a combination of the two (sleeping onboard and hotel stays). Qualify your client to determine what their needs and expectations are before booking. Please review the vacation package and what it includes.

## Sleeper cars

Some rail vacation vendors offer onboard overnight stays and have room categories much like cruise ships. These are for your long distance/overnight trips onboard, and generally include additional features, services, and amenities to ensure a smooth and relaxing journey. This will differ per vendor, but let's take a look at Amtrak Vacations to get a feel for accommodation options:

### Roomette (most affordable sleeper category)

- ◆ Accommodates 2 adults
- ◆ Capacity for two small suitcases and a small personal item or garment bag
- ◆ Toilets and showers are conveniently located nearby but not in the room

### Bedroom Suite

- ◆ Accommodates two adults. Some suites can be combined to make a suite for four people
- ◆ Capacity for two suitcases
- ◆ In-room sink and vanity with enclosed toilet and shower

### Family Bedroom

- ◆ Accommodates two adults and two children
- ◆ Capacity for two to three suitcases
- ◆ Toilets and showers are conveniently located nearby but not in the room

### Accessible Bedroom

- ◆ Accommodates two adults
- ◆ Capacity for two small suitcases and a small personal item or garment bag
- ◆ In-room sink, vanity, toilet, and shower
- ◆ Fully accessible to passengers with mobility impairment

All sleeper categories include a large picture window, electrical outlets, climate controls, reading lights, small closet, and more. When clients book a sleeper option, meals are included.

All in-room features include private daytime seating that converts to a bed at night, bed linens, toiletries, bottled water, coffee, turn-down service, a dedicated Sleeping Car Assistant, priority boarding, and use of Amtrak's Metropolitan Lounge at select stations.

## Additional Cars and Services

Rail Vacation trains will generally offer additional cars like lounge cars, viewing platforms, coach class for Amtrak short journeys, restaurant/dining cars, cafes, and more. Some meals may be included on the train, others may be included for restaurants off train. It depends on the package type and the specific train.

Another benefit of train vacations is the activities and excursions. Many trains travel to beautiful parks and landmarks and offer tours and day activities in some of the most beautiful destinations in the country! Please review the vacation package and what it includes. Most packages are customizable to meet your clients' travel needs and desires.

## Car Rentals

The majority of car rentals happen at airports, and the car rental market is primarily made up of the following three categories: **BUSINESS TRAVELERS**, **VACATIONERS**, or **REPLACEMENT MARKET** (short term rentals while the owner's car is being repaired).

Six general classes of a rental car:

1. **ECONOMY OR A SUBCOMPACT**: Fits one to two people comfortably with little room for baggage or luggage.
2. **COMPACT**: Fits one to three people comfortably.
3. **MIDSIZE OR AN INTERMEDIATE**: Fits three to four people comfortably. Usually a little more trunk room.
4. **FULL SIZE OR A STANDARD**: Fits at least four people comfortably, with trunk room for baggage or luggage.
5. **PREMIUM**: Fits one to five people comfortably or one to two people, depending on the style of luxury model (sport or luxury car model).
6. **SUV OR A VAN**: Can fit up to seven people comfortably.

### Rental Car Rates

Car rental rates are based on 24 hours, and price varies based on the class of car, whether the client chooses manual or automatic transmission, if the reservation is made in advance, city, how long you rent the car, day of week, and demand. Be sure to check for any mileage charges.

- Mileage charge: There's a 24-hour rate plus a fee per mile driven.
- Mileage cap: There's a 24-hour rate plus a fee per mile only after a certain number of miles.
- Unlimited mileage: There's a 24-hour rate with no additional charge for number of miles driven.

**Helpful tip:** Watch out for one-way rentals; they usually charge a one-way rental drop-off fee.

### What You Need to Rent

- Must fulfill local age requirement (usually 25, some companies allow 21 with an underage fee).
- Must have a good driving record.
- Valid driver's license
- Credit card – Many car rental companies will not accept a debit card to rent a car. The ones that do you need to let your client know that the rental company will place a hold on the funds in the account of up to \$400. You or the client would need to call the company and ask them if they accept debit cards and how much the hold would be for.

## Insurance and Waivers

It's ultimately up to your client to choose rental insurance and waivers or not. It's not your job to convince the client to get insurance, just to inform them about their options. A rental company will ask if the renter wants the following waivers for an additional charge:

- **COLLISION DAMAGE WAIVER:** The rental company will not charge the renter for any damages caused by collision.
- **LOSS DAMAGE WAIVER:** Rental company has no right to recover damages from vandalism or theft to the car. Example, someone breaks into the vehicle and steals the entertainment system. The client will not be responsible.
- **PERSONAL ACCIDENT INSURANCE:** If the renter incurs any type of personal bodily injury, the personal accident insurance will cover that injury. Often the renter's own car life and health insurance will cover the damage done by a car accident in a rental but their insurance premiums will go up.

## Motor Coaches (Buses)

A great alternative to rail or renting a car, buses are a great affordable way to travel. Many buses cover routes inaccessible to rail and offer some of the same amenities of car travel like comfortable seats, air conditioning, reclining seats, power outlets for your chargers, and some even offer wifi on board. Motor Coach companies do not pay commission. They will give you a net cost and you can charge a service fee to your clients that you would collect separately.

## What is a Transfer?

In travel, a transfer is a local travel component arranged as part of an itinerary. These can be simple point to point transfers like a transfer from airport to hotel, resort, or their vacation destination –or– luxury or deluxe transfers that can include additional amenities such as a customized banner or welcome sign, fresh towels, a bottle of wine, flowers and beer, to mention a few. Deluxe private transfers are a magnificent way to amaze your clients and customize your client's trip. A transfer may also be necessary to accommodate travelers with accessibility needs, or families with small children who require car seats or other special seats.

Although transfers are usually a short part of the trip, they can leave a lasting impression. As a travel advisor it's also important to realize that these travel components are commissionable. Booking transfers for your clients is really a win-win. However, if the client prefers to make travel arrangements themselves, be sure to tell them the transfer options available to them (taxi, bus, limo, shuttle, Uber, etc.) and where they are located (Taxi pick up or rental car desk at the airport, etc.). This can be as simple as telling them where the shuttle transfer is to their hotel at the airport, looking up timetables for local trains, or finding the subway route to get to the client's hotel. These are all things you can do before the client leaves on the trip that will enhance their vacation experience.

Also be aware that some travelers may require accessibility options like scooters, wheelchairs, power chairs, etc. Everyone likes to travel, so be sure to communicate with your client and be aware of their needs during their trip. Xstream partners with multiple vendors that offer transfers and accessibility options for your clients.

## Activities

Activities are what you do on vacation, and the kinds of activities available can affect which destination your client chooses. They could be excursions, tours, concert tickets, golfing, skiing, Broadway shows, sports tickets, theme parks, etc. Activities enhance your clients' vacation experience and increase your commission.

Choosing the right activities for your clients comes down to qualifying them correctly and knowing the location. When you qualify your clients make sure to ask them what their general interests are and what they want to do on vacation. There are multiple vendors on your Vendor List to book activities in hundreds of cities. If you know your client enjoys sports, music, art or theater, check Golden Tickets or LasVegasTickets. If your clients want to explore the history, culture or cuisine of their destination, check Viator, Venture Ashore, Project Expedition, ShoreTrips, Amstar or many other vendors on your Vendor List. We also partner with vendors that offer skiing, golfing, and other sports/adventures.

An important note is that if you're booking through a tour operator, check to see what activities and excursions they have available that you can book as part of the vacation package! Many tour operators already have special contracts with local companies that offer tours and activities, offering your clients unique and culturally authentic experiences that benefit local people and their communities.

For example, say your clients are going to Cancun, and they mention loving history, tours, and want to snorkel while on their trip. A quick search on ShoreTrips show a few snorkeling trips, and one to the Underwater Museum at The Cancun Marine Park. At only \$72 a person, you clients could check off each interest they have in one excursion. Be sure to review carefully what each activity includes, and if there are any restrictions, additional fees, or special instructions.

**Remember:** The point is not to upsell your clients, it's to enhance their vacation experience. Help your client make the most out of their vacation by helping them find things they love to do and earn commission too!

# Group Land Packages

## What is a Group?

In the most basic sense, a group is a large booking with multiple clients. It can be any type of vacation where multiple people want to take the same trip together. Examples of those who would need a group booking would be wedding parties, a large family vacation or reunion, a business trip, a social club or organization who all want to take a trip together, etc.

**Important:** Some suppliers have a different numerical minimum for what constitutes a group booking. Most hotels consider a group to be 10 or more rooms double occupancy.

## Benefits of Selling Groups

Not only does more people traveling mean more commission for you, it's also a chance to expand your client list, deepen your knowledge of a particular destination or vendor, and can allow you the opportunity to travel with your clients as a group facilitator if needed.

There are two different types of group bookings. International resorts and US domestic hotels. It's important to note, even though Hawaii, Puerto Rico, and the US Virgin Islands are a part of the US, they are treated differently in the travel world. Meaning, you would book these using a tour operator vendor as opposed to booking directly with a resort.

## Important terms in the following sections

- **ATTRITION**, also called slippage, is the term that hotels and meeting facilities use to describe the number of expected guests who fail to show.
- An **ATTRITION CLAUSE** in the contract is a commitment to pay for a specific number of rooms and should your number decrease, this reduction of numbers may require a payment as a penalty.
- **ROOM-NIGHT** (Room occupancy) is a term for room occupancy at a hotel property.
- **BED-NIGHT** (Bed Occupancy) is the number of beds in the entire hotel with the nights each of them is booked.

## Things to keep in mind before booking:

- How long can you hold group space (with or without deposit)?
- How much is the deposit, and is it refundable? At what point is it non-refundable?
- Is there an attrition clause in the contract?
- What are the payment terms?
- What is the cost per person?
- What are the amenities included?

## How to Book Groups at International Resorts

### Collect General Information

First, you need to have a general idea of how many people will travel, age range of everyone on the trip (some resorts will offer discounted rates for children -or- may not allow children at all), the number of rooms you will need, where the group wants to go, and the date range of the trip.

### Research and Training

Be sure to review the instructions on how to work with each vendor on your Vendor List to gain access to the vendor's website you will use. Then, take any training courses available for selling groups. Many vendors will not only have specialized training for selling groups, but they may also have contact information and a sales department specific for group travel.

You will then research a few options and get a quote for your clients. It is a misconception that group rates are lower priced than an individual booking. To obtain a fast and easy quote, get pricing for 2 adults in a room and give this quote to the client. The group rate will typically be the same. The advantages of a group booking are that everyone in the group pays the same rate, may also receive additional amenities, and the resort will generally give a comped room for booking a certain number of rooms. Wedding parties also receive additional amenities for group bookings. This could include a special designated venue, restaurant reservations or catering options, decorations, spa discounts, designated contact during the event, room upgrades, etc. Be sure to research current promotions for the vendor you're working with and review the group contract for a list of amenities offered.

### Group Contract

Once the clients accept the quote, the supplier will send you a contract. You will need to review the contract carefully and go over the vendor's policies and penalties with your client. This includes all cancellation policies like the cost incurred for canceling rooms or bookings, and attrition-the percentage allowed to cancel without penalty. These will be based on how close it is to the date of travel if the clients need to cancel. It's important to note that after a certain point, the booking will be nonrefundable. It is up to you to keep track of these cancellation dates and penalties and review the contract carefully with your client. We recommend that you have your client acknowledge the contract was reviewed in writing.

### Travel Insurance

Next, offer the client trip travel protection/travel insurance to protect their travel investment. The client is NOT required to buy trip travel protection, but you MUST offer it to them. If the client declines trip travel protection, they will check the appropriate box on their Credit Card Authorization Form. If the client has questions, provide them with a link to the insurer's website as well as the trip travel protection customer service line to help clarify the policy. Remember that it is required to get in writing that the client accepted or declined trip travel protection. The Credit Card Authorization Form that Xstream has provided to you has this built into the form for your convenience.



## Credit Card Authorization Form/s (CCAuth Form)

Once you have reviewed the group contract with the client/s, get a signed copy of the Credit Card Authorization Form from each client making a payment, and a copy of their government issued ID to ensure the person signing the form matches the name of the card holder. If the government issued ID does not match the card holder, you cannot process payment. Do not accept signed CCAuth Forms from anyone but the card holder.

The Credit Card Authorization Form does not include all of the credit card numbers for your client's safety and security, but it does include the type of card, amount being charged, name and address of client, and a place for the client to accept/decline trip travel protection, and confirm they have reviewed and understand all terms and conditions including cancellation policy. This form is crucial and can help protect your business and personal finances. This form is mandatory.

In some cases, the vendor may require their own version of a Credit Card Authorization Form to be completed by the client. You may use the vendor's Credit Card Authorization Form in this instance. If their CCAuth Form does not include a place for the client to acknowledge the booking terms and conditions including cancellation policy, or accept/decline trip travel protection, we recommend you use both the vendor's CCAuth Form and Xstream's.

## Payments

Group contracts generally require a deposit within 10 days after the vendor sends you the contract. This is typically paid by the group leader. The deposit holds the space and is not applied to any rooms. It can later be applied to the group leaders' room, and any remainder can be refunded to the client. You should set a minimum deposit required from guests of at least \$50 per person, and all monies received should be applied to the group. Most vendors will send you a group spreadsheet for you to keep track of your group. You will then need to send the completed rooming list by the date specified in the contract. You can set up a payment schedule for the guests or give them a date they need to get final payment to you. Be sure to always give a client the final payment date of at least 2 weeks prior to when the vendor requires it. This gives you a buffer in case some payments are late, or there is an issue with a credit card that can be resolved quickly.

Once you have the contract and have received the Credit Card Authorization Form from each client, collect the full credit card number from the card holders and pay what is due to the vendor immediately. **It is the agent's responsibility to keep track of all payment due dates.** If the vendor allows the clients to pay in installments, keep track of each payment date, and let your client know at least 2 weeks beforehand when the next payment will be charged to their credit card.

## Variations

New group options are becoming more widely available. They are known by different names, but are generally for smaller groups and can be called Flex Groups, Group Together, Groups You Way, etc. With these new options, the agent can request a promo code from the vendor. This code is used to group the smaller set of bookings together into the smaller group category, and also may qualify for some group amenities and discounted promotions. It's a win-win for everyone! You would book the resort just like you normally would and add the promo code where indicated. However it's important to note that rates are not guaranteed like they would be when you have a group contract. The rate is whatever it is at the

time of booking, and subject to availability.

## How to Book Groups for U.S. Domestic Hotels

### Qualify and Research

Like with any booking, first you will qualify your client to determine where they want to stay and the kind of amenities they're looking for. This will help you determine which vendor and property to choose to suggest to your client. Then check your Vendor List to see if the hotel company/chain is listed and has an agent booking site or training available. Follow any registration instructions.

### Commissionable Rate & Quote

Hotels in the US generally consider a group 10 or more rooms. Once your client has chosen the hotel they want for their group, you will need to contact the hotel and negotiate the group rate. Be sure to ask for a commissionable rate. It is as simple as asking, "Is this promotion offered as a commissionable rate to travel advisors?" If yes, tell the hotel that you are a travel advisor with the host agency Xstream Travel, and give our IATA: 45609642. Then, get a quote and send it to your client.

### Review the Contract

When your client approves the rate, you will then ask the hotel for the group contract. Check to see if the contract has attrition in it and try to negotiate a contract without attrition. **ATTRITION**, also called slippage, is the term that hotels and meeting facilities use to describe the number of expected guests who fail to show. An **ATTRITION CLAUSE** in the contract is a commitment to pay for a specific number of rooms and should your number decrease, this reduction of numbers may require a payment as a penalty. You will need to review the contract carefully and go over the hotel's policies and penalties with your client. We recommend that you have your client acknowledge the contract. It's usually received via email, and you can copy and paste it into a new document and remove any reference to your commission. Then print it and have the client sign and date it.

### Name the Group & Payment

Next you will need to name the group and then instruct the client to have their guests call the hotel directly to reserve their room. The guests need to be sure to tell the reservation agent that they are reserving a room as part of a group mentioning the group name. The client will then give their credit card to guarantee their room, and they will be required to pay at check-out. This is generally the preferred option that clients like to book for groups, however we do have a couple of vendors that can assist with groups and handle group bookings differently, like Marriott and AIC. We highly suggest taking the Marriott Hotel Excellence and AIC trainings. You will find more information about these vendors on your Vendor List. Be sure to review their agent reward programs as well!

**Remember:** It is your responsibility as the agent to review all policies and procedures with your client, including the cancellation policy, and keep track of all payment and penalty dates.

## Commission

After the travel date, the agent should follow up with the hotel about their commission. Some hotels send commission directly to Xstream or a third-party processor like ONYX or TACS who then send commission to Xstream. Other hotels may require an invoice from the agent (a sample hotel invoice is provided for you on your Xstream Agent Hub under Forms & Documents). The agent should communicate with the hotel and find out any requirements or procedures to receive commission.

If the vendor requires anything else, like a travel agency registration form, a W9 from Xstream Travel, the host agency's banking information, etc., please submit a Help Desk ticket from your Xstream Agent Hub and provide us with the confirmation number, dates of stay, guest name or group name for your booking, and provide a name and email address of a representative at the hotel we can contact. We will submit the required information to the vendor and reference your booking to expedite the payment process.

## The Booking Desk

Whether international groups or domestic, post your booking to your Booking Desk as soon as you receive the contract information from the vendor. It doesn't matter if final payment has been made or not, your booking needs to be posted to your Booking Desk on your Xstream Agent Hub to ensure we can forward any communications from the vendor to you should they contact Xstream headquarters, and pay your commission in a timely manner. Remember, we cannot pay you your commission if we don't know who the money belongs to.

For groups, not all hotels give confirmation numbers. If this happens, just be sure to post the group name as the booking confirmation number, and provide the hotel name and property in the Supplier field.

**Helpful tip:** Be sure to check your Vendor List for instructions on how to post your booking to your Booking Desk to ensure you are paid your commission!

## Top 10 Tips when Booking Groups

1. Read and understand the contract. This includes understanding Bed-Night vs Room Night, and attrition. Call the vendor for any clarifications.
2. Reminders – Stay on top of payment dates. Your group will cancel if you miss a deposit date.
3. Do not overbook your initial room block.
4. Have your client confirm the group contract with a signature.
5. Pad the payment due dates by two weeks to protect the group from cancellation.
6. Don't be afraid to collect additional deposits.
7. Be proactive with the guest list. Get the phone numbers and email addresses of all the guests. Be sure to give ALL guests *your* contact info. Phone number and email address.
8. Get a signed CCAuth Form from all guests giving you their credit card information. Keep in mind that you cannot keep the full credit card numbers on the form.
9. The client does not need to purchase trip travel protection, but you must offer it on every booking.

10. Don't forget you can sell additional activities through any of our activity vendors on your Vendor List! The point is not to upsell your clients but to ensure they get the most out of their experience! Plus, you make additional commission.

# Group Cruises

## Why group cruises?

The cruise experience is still relatively new for many travelers, with only 20% of US adults having taken a cruise. This is a great untapped market! Here are some reasons to sell a group cruise:

- **Dedicated groups departments:** Group business is extremely important for cruise line's growing market - every major cruise line offers a dedicated group department to handle special needs and requirements. They also offer training and marketing materials specific to group sales, which means you don't have to plan everything alone. From beginning to end they're there to help you through the process.
- **Group Amenities:** Cruise lines offer a greater value than a land-based trip. They can provide complimentary meeting space and venues, access to video and audio equipment at no extra charge (unlike hotels that charge for those meeting rooms and spaces), and help you coordinate any special events. There may also be additional amenities like champagne and chocolate, premium wines, private parties, category room upgrades, onboard credit, spa credits, group photographs, private excursions or dinners, and more!
- **Competitive rates:** When your clients pay for their trip, they'll know exactly what's included in the upfront cost and may receive additional financial benefits like group discounted rates and flexible payment schedules.
- **Variety:** With new ships being built and introduced each year, your group has more choices in both destinations and ship than ever before. While onboard, cruising offers a large variety of activities, entertainment, and dining, so there's bound to be something for everyone.
- **Higher commission earnings:** Because you're selling to multiple clients at a time, you'll earn more commission than you would with a single individual booking. There are also opportunities to make additional commission from add-on services or products like excursions, room upgrades, pre-departure hotel stays, trip protection, etc. You also diversify your clientele, which means opportunity for future business.
- **Tour credit:** Many cruise lines offer a tour credit (tour conductor credit) -or- free cruise fare, based on a number of guests paid in full. This means you or a group leader can travel with the group for free!

*And most importantly, a cruise vacation has one of the highest satisfaction rates in the industry!*

**Hot tip:** Encourage your clients to arrive a day early to their embarkation city. This will keep stress to a minimum in case of any flight delays. It also gives you the opportunity to book pre-cruise hotel stays and activities. Consider booking a pre-cruise dinner or get-together for your clients. It's both an opportunity for additional revenue for you, and the perfect way for your clients to kick off their vacation with fun and good energy.

## Types of Groups

1. **Affinity Groups:** Weddings, family reunions, anniversaries, celebrations, social events, etc

2. **Corporate/Incentive Groups:** Company retreats, conventions, etc.
3. **Speculative Groups:** When agents block group space with a cruise line before having a set number of clients. The agent must then market a group cruise to the public or past clients in order to fill that group space. These are sometimes called promotional groups.

## Fundraising Cruises

Carnival Cruise Lines offers fundraising cruises which is a type of affinity group. Fundraising cruises are essentially a pre-set amount collected per cabin to be allocated and paid after travel to a non-profit organization to help with their fundraising efforts. This is a great way to raise money for churches, schools, or any nonprofit organization. The benefits are the organization raises funds with a unique and exciting event, while members enjoy a vacation and feel great about supporting a worthwhile cause. Carnival also offers a TC (tour conductor) credit for every 8 rooms booked. This credit can be used to allow the group organizer, travel agent, guest speaker, etc, to sail for free or at reduced cost.

## Booking a Group Cruise

If you've organized a group trip in the past, you know there are numerous details to take care of. From deciding on the destination, itinerary, researching trip insurance options, marketing the group, and reviewing group terms and conditions as well as cancellation policy, a lot goes into the planning process before anything is even booked.

The next phase includes blocking group space, collecting Credit Card Authorization Forms and deposits, submitting payments, coordinating itineraries, getting documents, arranging shore excursions and other group amenities onboard, and more! Let's get into a general breakdown of this booking process.

### Qualifying the Group

Group cruises function a bit differently than individual cruises. Generally, unless you're planning a speculative group, you will have a lead traveler approach you to plan a cruise for a group of friends, family, or like-minded people. Group members like camaraderie and the enjoyment of sharing experiences with people and associates who share similar interests.

Cruise lines generally consider 8 or more travelers a group. This is starting to change with more flexible group options in the travel industry. You should check with each individual cruise line to determine their minimum and maximum number of guests that qualifies your booking as a group.

You'll need to qualify the client as well as the group. Find out what the group members enjoyed about their past trips and vacations. What were their main likes and dislikes? Be sure to determine the number of days they would like to cruise and the ports of call they want to visit. You also need to know a general idea of how many people will be traveling, the age range or demographics (For example, are the ages multigenerational, or is everyone a certain age and older?), and the budget they have in mind.

Keep in mind that cabin prices are based on double occupancy, and cruise lines lose revenue if the cabins are not filled. This means prices are higher for a cabin booked with only one occupant. There may also be a penalty for if more than a certain number of cabins are booked as singles. Additionally, there

may be an increased rate on cabins that are booked for three or more travelers in one room. Check the booking terms and group policies before booking and notify your clients of these policies so they are aware.

### Choosing A Cruise Itinerary

The first cruise itinerary that comes to mind for most people is a Caribbean cruise. These are especially common in winter months because they're a great way to escape the cold, but there are plenty more cruising destinations and options. Cruise lines sail and offer itineraries all around the world, and departures from home ports across the U.S. have increased.

During the summer months, Europe, Alaska, Bermuda, and New England are great choices. There are also great options to the South Pacific, South America, Asia and Dubai. Adventure cruising has also become increasingly popular as travelers seek active and educational vacation experiences. Popular options include destinations in the Galapagos Islands, sailing on the Amazon River, and expedition cruises to Antarctica, for example.

Another option is river cruising, which has gone through explosive growth in the last few decades. With river cruising, you're never far from shore which offers safety and peace of mind, and the ships can access unique ports and river towns not accessible by large cruise ships. The smaller vessels can often dock right in the heart of these towns, and many provide an all-inclusive way to explore a destination.

### The Vendor List

To gain access to a cruise line's dedicated agent booking platform, please see your Vendor List located on your Xstream Agent Hub. We list instructions on how to work with each vendor and how to register or request access.

Some vendors are considered preferred. This means that they offer higher commission percentages or agent benefits, pay commission quicker, or we overall have a better working relationship with them. All our preferred vendors show first on the Vendor List and have a gold ribbon next to them. You should always try to work with a preferred vendor first, but you are welcome to use any supplier on the list.

### Choosing The Right Ship

The cruise industry is continuing to see new ships added each year with the addition of new classes/categories of ships. Bigger or newer does not always mean better. Some cruise lines focus on smaller or midsized ships, and cruise lines continually renovate their existing ships to create and maintain product consistency. Although it's easy to think that all cruise lines are alike, they actually fit into different categories. Cruise line categories include **CONTEMPORARY**, **PREMIUM**, **DELUXE**, **LUXURY**, **SPECIALIZED**, and **RIVER CRUISES**, and they vary according to cost as well as amenities included.

#### Different Cruise Categories:

- **CONTEMPORARY:** These are the resort style brands. It's also known as the mass market category, and generally the size is mid to huge, the price is moderate, and the personality is casual with multiple on-board activities available. Some examples are Carnival Cruise Line, Royal Caribbean Cruise Line, and Norwegian Cruise line.

- **PREMIUM:** These are midsize to large, and the price is moderate to high. The personality is casual to upscale, so it's more resort style activities with plush features. Some examples are Celebrity Cruise Line, Holland America Line, and Oceania Cruise Lines.
- **LUXURY:** These are smaller to midsize, and the price is going to be high to deluxe. The personality can range from casual to upscale, so you have more personalized service, exotic ports, and plush features. Some examples are Crystal Cruises, Regent Seven Seas Cruises, and Silversea.
- **SPECIALTY/EXPEDITION:** These are niche, the size is usually small to midsize, and the price is moderate to deluxe. The personality is casual to upscale, so it has varying amenities and activities based on the distinct focus of the cruise. Some examples are the Delta Queen Steamboat, a riverboat cruise down the Mississippi, or Voyages to Antiquity, which is a cruise that explores the architecture, archeology, history, and culture of ancient civilizations along the Mediterranean.
- **RIVER CRUISES:** These are smaller ships because they need to fit on rivers. The price is usually moderate to deluxe. The personality is casual to upscale, and its varying amenities and activities are based on the distinct focus of cruise. Some examples are Viking River Cruises, AMA Waterways, Uniworld, and Avalon.

#### Additional considerations when choosing a ship:

- ◆ **Client's preferred destinations and climate:** Be sure to keep in mind climate differences based on time of year and location (based on hemisphere, and the proximity to the equator).
- ◆ **Size of ship:** Do the clients want a more intimate ship experience, or a mega-ship from a contemporary cruise line?
- ◆ **Length of trip and preferred sailing date:** Cruise lines have different availabilities for different itineraries and destinations.
- ◆ **Embarkation city:** Do your clients prefer to sail from a specific city? This will narrow down the choices of available trips.
- ◆ **Amenities**
- ◆ **Past passenger status:** Most cruise lines have multi-tiered rewards programs for repeat customers. If your client/s are rewards members or past guests on a particular cruise line, amenities can extend to the guest based on their level of membership. Ask for any passenger club membership numbers.
- ◆ **Types of accommodation onboard:** This includes room categories and onboard ambiance.
- ◆ **Entertainment**
- ◆ **Dining options:** Look for a ship that can accommodate their dietary needs as well as preferred dining style (flexible or traditional) and dress code. You'll also need to ask if they all want to dine together.
- ◆ **Onboard ambiance:** Keep in mind some cruises are for adults-only (like Virgin Voyages), and others offer options for families (like Carnival).
- ◆ **Travel documents:** Do they have a passport? If no, consider domestic ships and destinations.
- ◆ **Budget**

By qualifying the client, you will be able to narrow down the available options and begin researching rates. Cruise lines tend to offer their more competitive group rates on off-peak sailings, however cruise



lines will occasionally offer promotions for certain air departure cities, as well as certain stateroom categories.

It will be very beneficial to you to take any training offered by the cruise line as well as browse their current promotions.

For instructions and registration instructions for each supplier, please see your Vendor List located on your Xstream Agent Hub. You will also find links for any training or marketing programs, as well as contact information for each supplier

### Block Group Space

Once you've decided on your ship, itinerary, and sailing date, as well as the stateroom categories needed, you will then block the group space. This means hold the number of rooms your group requires. It fixes the price and availability and is generally done anywhere between 8-18 months in advance. Depending on how large your group is, you may need to contact a specific department to handle your group size. This is generally indicated on the supplier's agent booking site or training materials. The group department or group contact will be able to assist you if this can't be done on the online booking platform.

### Group Contract

Next, the cruise line will send you a group contract that lists prices, the stateroom categories reserved, dining choice, and any other details. The contract also includes the deposit and final payment due dates. Be sure you review the group terms and conditions as well as the cancellation policy with each client. They will need to acknowledge they agree and have reviewed these policies on their Credit Card Authorization Form.

You should also go over any travel documentation necessary for boarding. This includes passports and visas. Cruise lines are very strict on forms of identification required, as well as making sure names are spelled correctly and match the documentation. Your client can be denied boarding if they do not have the correct travel documents or they're incorrect, with no refund given. [Passports](#) are recommended for all U.S. citizens traveling outside the United States and they must be valid 6 months after their return date.

Be sure to note when dining choices need to be finalized, or any deadlines or procedures to make any special requests such as dietary or accessibility needs (see our lesson on Accessible Travel for more information). If your group is having any special functions or meetings, this will also need to be requested and finalized as well.

Also remember to enter passenger club membership numbers for your clients when applicable. This way any amenities or benefits can be applied that don't conflict with ones already being extended to the group. You may also apply group credits and tour conductor credits to determine the price per person or amenities offered based on the number of travelers. Check the cruise line for additional cruise credit or group amenities policies and when they can be applied.

## Trip Travel Protection

Offer trip travel protection/travel insurance to each client, either the policy offered through the cruise line, or a separate policy chosen by you from one of the travel insurance providers on your Vendor List. Trip travel protection is a package of benefits and services intended to protect the client's travel investment, their belongings, and most importantly, the client. It's important to select an insurance that will cover compensation for travel delays, emergency evacuation as well as delayed or lost luggage. Regardless of if the client/s purchases it or not, they must acknowledge that it was offered to them when they sign the credit card authorization form. This can also help prevent chargebacks and protect you and your business.

## Credit Card Authorization Form

When your client/s is ready to make a payment, have the client/s fill out a Credit Card Authorization Form. This form is located on your Agent Hub under the Resources Center tab. This form is required, no exceptions. It not only protects you from credit card chargebacks, it also authorizes you to use the client's credit card to pay for their vacation. By filling in and signing this form the client affirms that they have read and understand the cancellation policies and indicates that the client either accepts or denies trip travel protection. This form must be filled out completely and physically signed by the card holder. Be sure to also get a copy of the card holder's government issued ID. This confirms their identity before charging their card.

## Deposits and Payment Schedules

Each vendor handles payments and deposits differently, but cruise lines will provide you information on their payment options and schedules. Some vendors only require a first deposit followed by a full deposit and then final payment at a later time, others may require a full deposit and/or full payment upfront. In more recent years, many cruise lines have started offering customized payment schedules that allow clients to pay their balance in multiple payments. These programs are generally available once full deposit has been paid, and within a certain timeframe before final payment is due.

Pay close attention to the deposit due dates and set reminders for yourself to follow up with your clients to request payment 2 weeks before the payment is due. This extra time gives you a buffer to resolve any issues that may arise. If you do not make these payments by the dates the vendor assigns, your trip will be automatically cancelled by the vendor, so it's a good idea to keep an accurate calendar and set up a reminder to reach out to your client in advance of when a payment is due. Keep in mind, when a trip auto-cancels you could lose the deposit and any money paid so far on the trip.

## Submitting a Payment

The only payment methods you may accept as an independent agent with Xstream Travel are credit and debit cards. No exceptions. This is for legal and liability reasons to protect both you and the client. Once you get your client's Credit Card Authorization Form, make their payment immediately with the vendor.

## Booking Desk and Travel Documents

After the booking has been confirmed with the vendor, immediately place your booking on your Booking Desk on your Xstream Agent Hub. This includes group bookings that do not have a deposit or full payment on them yet. This ensures you will not only receive your commission after your client travels, but also ensures you receive communications from the vendor including travel documents, payment

confirmations, itinerary changes, etc. that you will need to pass on to the client. Sometimes the vendor may call us looking to talk to you and, if they only have your first name, we would be unable to locate you. If you have your booking posted on your Booking Desk, we can look it up by the booking confirmation number.

Most travel documents are sent via email in the modern cruise industry. Once they are available, provide your group members with their E- documents.

### Air/Sea Packages

Determine how airfare will be booked. Will you book the airfare provided by the cruise line, arrange your group's own separate airfare, or leave flight arrangements to the clients? Many travelers arrange their own flights and pay a cruise-only rate for the cruise itself. Others will take advantage of special fly/cruise arrangements. These air/sea packages come in three varieties:

- The cruise line arranges air charter between major cities and the point of embarkation.
- The cruise line gives the travelers an air credit, and they arrange their own itinerary. If the flight they choose costs more than the credit, the traveler pays the difference.
- The cruise line negotiates a schedule and rate with the airline and pays for the round-trip air service to the embarkation point. Travelers do not have control over the choice of airline or schedule.

The benefit of an air/sea package is that the cruise line is responsible for getting the passengers to the ship and for any transfers. If there are any delays or cancellations the airline will assume responsibility for any refunds or fly the travelers to the next port of call to catch the ship. In contrast, when travelers make their own flight arrangements, they are responsible for making it to the ship on time.

Next, determine how you will coordinate schedules for transfers from the airport to the cruise pier. Will you arrange transfers to the cruise ship for your clients through the cruise line, use a vendor from your Vendor List that offers transfer services, or allow them to arrange their own?

### Tips for traveling with your clients

Before the Cruise: Have a complete list of the following information:

- List of all travelers, their contact information and emergency contact information, as well as a rooming list.
- List of all dining requests and table arrangements, as well as a copy of the flight schedules, seat assignments, and airline reservation phone numbers.
- Contact information for the travel insurance company that your group purchased through (if applicable).
- Contact information for the company you booked transfers through (if applicable).

### During the Cruise

- When you arrive to the ship, make sure your group members get checked in, and speak with the cruise line support desk verify dining room and table assignments, as well as the stateroom list.

- Schedule a welcome get-together the first day to meet your group. This could be a scheduled party or casual dinner. You should also discuss their itinerary, meet-up plans, etc. Make sure your clients know how to contact you should an issue arise. Also give them contact information for the customer assistance or support desk.
- Throughout the cruise, periodically touch base with your clients. Make yourself available and visible.
- Near the end of the cruise schedule a time to meet with your group to discuss disembarkation procedures. You'll also want to make sure they have all their flight and transfer information, and remind them to check-in for their flights. It's also a great time for a farewell party or event.

### Go the Extra Mile

Some agents choose to go the extra mile to give their clients a memorable and positive experience of working with a travel agent. You could set up bon voyage gifts for you clients like a bottle of wine or a gift bag in their room. It could be something as simple as giving them information on their destinations, immigration information, customs forms, or suggestions on fun activities or restaurants to check out at their ports of call. Make your client's trip memorable, and they are more likely to come back to you with future business.

### After-Cruise Follow-Up

Once your clients return from their cruise you should contact them to welcome them home and ask how their trip went. This gives you valuable feedback on the destination, the cruise line and ship, on your client's satisfaction with your services, and builds a relationship with that client to ensure future business. Send an email or give them a call a week or so after they return to give them enough time to settle in from their trip. If you have followed them on social media, be sure to like or comment on their vacation photos.

### Commission

It's important to post your bookings to your Booking Desk immediately after blocking group space (even if that space hasn't been filled or final payment hasn't been paid). Please see your Vendor List located on your Xstream Agent Hub for instructions on how to post your bookings to your Booking Desk. Some cruise line companies like RCCL and Carnival pay to the group reservation number. This means you only need to post the group number to your Booking Desk. Other cruise lines pay to the individual reservation numbers, meaning you will need to post each reservation in the group separately to your Booking Desk. Your Vendor List will provide posting instructions for how to post your booking.

Be sure to also double check your reservation number is correct on your Booking Desk. The number 1 looks a lot like the letter l, and the letter o looks like the number/digit 0. It's important to post your bookings correctly to your booking desk and on time to ensure you receive your commission payment.

# Part 4

## Agent Benefits & Tools

## Agent Benefits

Now that you have a better understanding of what a travel agent does, and how to sell Travel, let's discuss some benefits of being an independent agent with Xstream Travel

### Commission

One of the main benefits in being a part of a host agency like Xstream Travel is Xstream has high productivity levels with our preferred vendors, so our agents are eligible for higher commission percentage rates than they would be working outside of our host agency. To see the commission percentage paid by each vendor, please review your Vendor List. Please note, there is no commission for air only bookings.

**Pro Tip:** Preferred Vendors pay on a higher commission tier and usually pay out commission faster than other vendors. This means you should always research your booking with a preferred vendor

### Commission Payout

We offer some of the highest paid commission percentages over other host agencies in the industry! Your commission payout is dependent on what commission tier payment schedule you fall under with Xstream Travel.

New Faces	Tier 1	Tier 2
75%	75%	85%

For example, if you book a client on a Carnival Cruise and the base rate is \$1,000.00, Carnival's commission percentage is 16%, so total commission sent to Xstream Travel will be \$160.00. If you are a Tier 1 travel agent, you will receive a commission payout of 75% of the commission received by Xstream. This means the total commission you will receive will be \$120.00.

We also run vendor promotions multiple times a year to receive commission bonuses on qualifying bookings where you can earn up to 100% of commission earned!

***Commission payout is Fridays after 4pmCT***

### Travel Agent Discounts

A travel agent discount is a discount offered to an agent by a vendor for personal bookings. This discounted rate is not valid to anyone other than you. You cannot book a travel agent discount rate for a client, family member, or friend. Every vendor has their own policy for what they require in order to use

a travel agent discount. Generally, the agent must have their own IATA card or proof they are a travel professional. The CLIA Embarc Card is usually accepted too.

[How do I obtain a travel agent rate for my personal booking?](#)

First, please contact the vendor directly and ask about their travel agent rate policy. This policy will vary for each vendor. The vendor may require that you complete a specific training first, have your own IATA or CLIA card, or they may require a copy of Xstream's W9 and an email from our agency as proof/authorization that you work under our agency. Remember, each vendor/travel supplier has a different policy regarding agent discounts or incentives.

If the vendor requests a verification email or W9 from Xstream Travel, please submit a support ticket from your Xstream Agent Hub under the ticket category Travel Agent Support. Please provide us with the name and email address your agent authorization letter needs to be sent. We will also need the name of hotel/resort, address, your travel dates, hotel/resort phone, and reservation number if you already have it. Once your information is received, we will send out the email per your request.

[Can I use the agent rate on bookings for other people?](#)

NO. This agent rate only applies to travel you will personally be on. When you arrive, the vendor may request proof of your identity and credentials as a travel advisor (like CLIA or IATA card). If these credentials cannot be provided, they may choose to end your working relationship and nullify any bookings made that break their policies. It's important to reach out to the vendor and review their agent rate policies before booking.

[Do I make commission on bookings made with an agent rate?](#)

Generally, no. The agent rate is a discount for travel advisors either as a reward incentive or educational opportunity, and so is calculated to disclude the commission amount as part of the discount. Think of it like this: instead of getting a commission percentage after travel, you're getting it in full upfront to discount the rate of the reservation.

## TRAVELSAVERS

Xstream Travel has partnered with TRAVELSAVERS, the travel consortia network with more than 2,800 agency members around the world. As an extension of you Xstream, TRAVELSAVERS is committed to championing the value of a travel professional.

They provide Xstream with the opportunity to use innovative tools and technology to help grow your business and increase your revenue with a personalized path to financial success. These tools include effective marketing programs, cutting edge technology, long standing preferred suppliers partnerships, dedicated service team, training & networking opportunities, and more!

## FAM Trips

FAM or "Fam trip" is short for "familiarization trip." Xstream hosts Fam trips throughout the year, but you also have the ability as a qualified travel advisor to book your own. They are generally short trips taken by travel advisors at a discounted rate, designed to learn about a destination or travel supplier to gain first-hand knowledge through experiencing it.

## Learn and Grow Bootcamp

The Learn and Grow Bootcamp is a two to three days intensive training course that focuses on travel,

products, sales, and marketing education. It offers hands-on, face-to-face training with preferred vendors, guest speakers, and knowledgeable travel agents and managers that go over how to utilize all that Xstream Travel has to offer.

### Exclusive Agent Trips

Our agent trips are planned and executed by the Xstream Travel corporate team, exclusively for Xstream Travel agents and their family. They offer the chance to connect with fellow agents and Xstream staff at beautiful resorts and fun locations. There are also training events and opportunities, themed parties, and fun gettogethers with other agents like you. In the past we've gone to destinations like Punta Cana, Jamaica, and Cancun.

### Seminar at Sea

Similar to our Exclusive Agent Trips, the Seminar at Sea is exclusive to Xstream Travel agents and their family. There will be multiple opportunities for several training seminars, agent get-togethers, and parties on board. In the past we've gone on the Oasis of the Seas and Carnival Triumph.

### Conventions

Every year we hold an annual convention where agents come from across the country to learn about all the exciting updates and news with Xstream Travel. We're always announcing new agent benefits, training opportunities, and travel news to help you with your business. There is also Xstream Travel trade shows where vendor booths are set up and offer special breakout training sessions, so you get even more hands-on training from vendors.

### Dedicated Travel Staff

Xstream Travel is one of the largest host travel agencies in the country. Our knowledgeable staff works hard to support you and your business. Through our many years of our own experience selling travel, we are here to help you jumpstart your own career in the travel industry.

### Build your own team

We offer the unique opportunity to increase your commission by building your own team of travel agents. This Travel Team Bonus awards you a 5% override on the travel commission earnings of every agent you refer. Create your own team, earn 5%, and build your own travel agency without the cost of overhead.

### Your Own Career

An independent travel agent career allows you to earn extra income, learn new skills, and discover new places to travel. It does not matter how much travel you sell, you are bound to reap the amazing benefits of being an independent travel agent. Your job is to help people design a firsthand experience and craft the perfect vacation, while earning top tier commissions. And the great news, we're always adding more benefits!



## FAM Trips

FAM or "Fam trip" is short for "familiarization trip." They are generally short trips taken by travel advisors usually at a discounted rate, designed to learn about a destination or travel supplier to gain first-hand knowledge through experiencing it. They serve two main goals:

- Gain knowledge about the product or service: Go beyond the brochure! A fam trip helps you gain knowledge about a product or service that only someone who was there would know. As an advisor you get to experience the supplier through the eyes of a client. This will help you anticipate the kinds of questions your clients may have about the product or destination. For example, if you take a Fam trip to a resort in Mexico, you may learn where the closest place to convert money is, what rooms have the best view, what the nightlife is like, if there are a lot of stairs, how long the walk is from the rooms to the restaurants or pools, etc. Some knowledge is not in a brochure and can only be learned by experiencing it.
- Build relationships with travel suppliers: Exchange business cards and contact information with the managers and other people you meet while on the FAM. When your clients go to that hotel/destination/etc, you can reach out to those contacts to let them know you have a client traveling. Not only will you prove that your FAM was beneficial to you, but it will also show the supplier that it was beneficial for them. You'll be able to provide a personalized level of service to your client you may not have been able to provide without that FAM experience and build a close relationship with the supplier in the process.

Keep in mind, although they are fun and educational, these are professional business trips. You will be expected to conduct yourself like a professional and must attend every event and meeting of the trip itinerary. Failure to do so is grounds for termination. The Host of the FAM may charge you for the trip if you did not attend the events or meetings.

### Why take a FAM trip?

The bottom-line is to gain current and accurate knowledge of a product/service to maximize your sales. Matching a client and their preferences to a specific travel supplier that caters to both their style of travel and their budget expectations is one of the biggest considerations when qualifying your client. FAM trips enable travel advisors to gain a deeper understanding of the product or service by experiencing it themselves. It also allows the advisor to anticipate what kind of client is best suited for this product or service, what the experience is actually like, and gives a better understanding in assisting with planning an overall budget for their client's trip.

### What is FAM trip like?

It's not a free vacation! Fam trips involve hard work to fully capture every aspect of the travel experience and understand the supplier's product. There's often a lot of information to capture and very little downtime. They generally have a lot of early mornings and days packed with activities.

It's important to understand you are working on these trips, and you represent not only your personal business, but also Xstream Travel. Always dress professionally but comfortably to walk a lot during your

inspection. This means having the right walking shoes, and dress to accommodate not only the weather, but the amount of activity you will be doing (it's a lot!). It's also a good idea to have business cards to give to your contacts to network. You want to leave a professional and positive lasting impression.

What should I do before I take a FAM trip?

Determine if this FAM is in alignment with what you plan to market and sell: If you specialize in all-inclusive travel, it makes more sense to find FAMs focused on destinations and suppliers who offer all-inclusive resorts, opposed to Alaskan adventures (for example). Unless you're looking to expand your focus, stick to what you know you can -or- want to sell.

Determine who you will sell this product or service to: Identify 1-5 clients that may be a good fit with this supplier. If you're new to the business, determine what kind of client they would be. This will help you determine if this FAM makes sense for your business. If you don't know anyone who would be interested in this product or service, really consider if this FAM is right for you. If you know at least 1-5 people who might be interested in this product or service, you have a better chance of this experience benefiting your business. Remember, none of us would be in this business if we didn't like to travel, but our bottom line is to run a profitable business.

Take the supplier's training: Most suppliers have a training program or at the very least, a brochure or website. Learn as much as you can before you travel. You want to dive deep when you get there, not ask basic questions already answered on a website. This helps you ask meaningful questions when you get there and maximize your time to gain the greatest benefit.

**Pro Tip:** Look at all the room categories online. Communicate which room categories you would like to see with the supplier beforehand to make sure they're available while you're there.

**Pro Tip:** If you specialize in weddings, learn about the wedding packages online. Communicate with the supplier you would like to speak to the wedding coordinator when you arrive and gauge their availability. Also ask to visit their wedding venues / spaces.

How do I book a FAM?

Xstream Travel schedules FAM Trips, Xstream Experiences, and other training events throughout the year, however you are not limited to Xstream hosted events! Many vendors offer agent FAM and inspection rates or specific FAM training events. Check the supplier's site or reach out to the vendor's BDM. Some vendors may require that you've earned your CLIA or IATA card. Others may have other qualifications like completing their training program. It's important to meet the qualifications determined by the vendor/supplier before you book.

For example, Marriott has a program called Marriott Hotel Excellence. Their "FAM-tastic" rate program requires advisors to complete their Hotel Excellence training program and hold a valid IATA or CLIA card when checking in.

**Pro Tip:** Amstar can help agents schedule FAMS for some resorts in the Caribbean and Mexico. They can assist in making appointments and arranging transportation between resorts.

#### What to do on a FAM?

- **Take postcard ready photos:** This allows you to create marketing materials to send to your clients. Get pictures of menus and food, rooms, pools, activities, transportation schedules, the outside of the venue, etc. Try to take photos without you or other people in them if you can.
- **Ask questions:** Now is the time to ask questions that were not covered in the supplier's training or on their site. You can even print out information online and ask them if anything has changed to make sure you have the most current and accurate information to help you sell to your clients.
- **Network:** Exchange business cards and contact information with the managers and other people you meet while on the FAM.

*Experience & enjoy! What are the must try restaurants, spa treatments, pools, excursions, activities, etc.? Learn it by experiencing it yourself!*

**Pro Tip:** If you visit a resort and are approached at the resort for a timeshare pitch, and do not want this for your clients, politely and professionally ask what the process is to request that your client not be approached for a timeshare pitch and allowed privacy to enjoy their vacation. This is to respect your client's time and money they've spent at this resort, as well as for the resort to respect your business. This is your client, and you want to ensure repeat business for both you and the resort.

**IMPORTANT:** Please never share FAM rates with your clients or other travelers, or recruit agents or other travelers while on your FAM trip. These are experiences to gain knowledge and make professional contacts with suppliers only. It's important to respect other travelers and the supplier while on your trip.

#### What to do after a FAM trip?

Remember those 1-5 people you determined might be a good fit for this supplier? Once you get home contact one or more of them to let them know about your trip and let them know how it might be a good fit for their next vacation! It doesn't need to be a cold call to get them to book, just a quick message that you thought of them while on your trip and share a photo.

Ex. If you have a client that loves Mexican food and you found the perfect authentic Mexican restaurant, tell them! Send them a picture of the menu or the dish you ate. Let them know you thought of them and they would love this dish too!

Next, go online and blog about your trip on your social media pages. Use the pictures you took and create marketing materials. Show what a great time you had and be sure to give contact information for how your clients can contact you to book!

Reach out to the BDM to let them know how your FAM went. Ask them to keep you in mind for any similar training events and ask to be put on a mailing list for special rates or promotions for this supplier.

# Xstream Agent Hub

## Vendor List

The Vendor List is a web page located on your Xstream Agent Hub that lists all the travel suppliers we work directly with. This means we have already established a working relationship with them and have provided you some information on the vendor's site including how to register or request login information for their site, contact information, training and rewards programs, marketing materials, and more!

BOOKING DESK VENDORS HELP/FAQS CRM 1099 ORDER HISTORY

## VENDOR LIST

VENDORS

Vacation Packages | Cruises | Hotels | Vacation Rentals | Escorted Tours | Travel Insurance

Activities/Specialty | Ground Transportation | Rail | Condos/Villas | Air

<b>AGENCY INFORMATION</b> Xstream Travel 101-C North Greenville Ste. 245 Allen, Texas 75002 214-383-0122	<b>NUMBERS ASKED FOR BY SUPPLIERS</b> IATAN / IATA#: 45 609642 CLIA#: 45 609642 FAX#: 972.692.7517 <i>When asked for agency phone number please refer to the instructions on the</i>
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IC AGREEMENT AND POLICIES & PROCEDURES

W-9

ACCESS PAYONEER SITE

XSTREAM HELP DESK TICKET

TRAVEL COMMISSION RESEARCH FORM

**Note: You'll be able to access the Vendor List once you complete the XTU training.**




Xstream Travel works with hundreds of suppliers, but you can immediately narrow down your search by looking at our Travel by Destinations document or by travel category on your Vendor List, which breaks down vendors by travel category. The travel categories are vacation packages, cruises, hotels, escorted tours, travel insurance, vacation rentals, activities/specialty, ground transportation, rail, condos/villas, and air.

Some vendors are even considered preferred. This means that they offer higher commission percentages or agent benefits, pay commission quicker, or we overall have a better working relationship with them. All our preferred vendors show first on the Vendor List and have a gold ribbon next to them. You should always try to work with a preferred supplier first, but you are welcome to use any supplier on the list.

 = PREFERRED VENDORS

*\* Please identify yourself to vendors as an Xstream Travel agent*

*\*\* Click on the logo to access the supplier information and website*

 Abercrombie & Kent	 AFRICAN TRAVEL WE KNOW AFRICA	 Allianz Global Assistance
 Amstar	 AMTRAK Vacations	 APPLE VACATIONS
 Avanti DESTINATIONS	 AZAMARA	 BRENDAN VACATIONS Taking You Personally
 Carnival	 Celebrity Cruises®	 CLASSIC VACATIONS
 collette	 contiki	

To learn more about a vendor, click on the vendor logo on your Vendor List. This will bring up a new screen with information on that vendor, how to work with that vendor, contact details, commission percentage, and any special instructions on how to post your bookings on your Booking Desk that you made with that vendor.



<http://www.goccl.com>

FIT Sales/Service Domestic

Hours: Mon-Fri 9am-10pm ET, Sat-Sun 9am-6pm ET

Phone: 800-327-9501

Travel Agents Group Sales/Service Domestic

Hours: Mon-Fri 9am-8pm ET, Sat/Sun Closed

Phone: 800-327-5782

Sales Support  
Email: [salesupport@carnival.com](mailto:salesupport@carnival.com)

BDM: Karen Needham  
KNeedham@carnival.com

### Carnival Cruise Line



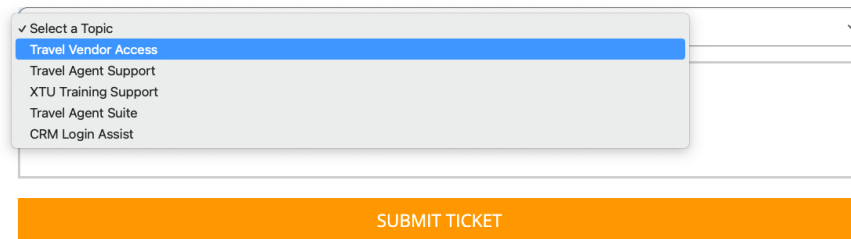
(Please stop or pause video before leaving this screen or the video will continue playing)

#### Registration

Agent must register themselves on the supplier's website. Click on "Register Now," under Need and Account? on the goccl login page. Fill out the form using your personal information except where asked for the agency name and agency phone number. Use the Agency Name: Xstream Travel and

**IMPORTANT:** You MUST check your vendor list before trying to access a vendor’s website or trying to book with that vendor. Some vendors have special registration instructions or require Xstream Travel to register you under our agency on your behalf. If you are registered incorrectly with a vendor, it will affect your commission.

If the instructions require you to submit a help desk ticket, simply click on the orange box on the right side of the vendor list that says, “Xstream Help Desk Ticket.” Once the help desk ticket screen pops up, just select the category “Travel Vendor Access,” let us know which vendor you need access to, and then click submit. You will receive a response within 48 business hours with your login information.



✓ Select a Topic

- Travel Vendor Access
- Travel Agent Support
- XTU Training Support
- Travel Agent Suite
- CRM Login Assist

SUBMIT TICKET

## Booking Desk

Your Booking Desk is located on your Xstream Agent Hub under the *Booking Desk* tab. Once you receive a confirmation number for your booking or hold group space, your booking should immediately be posted to your Booking Desk. To learn more about your Booking Desk and how to post your bookings, please revisit the Booking Desk training module.

## Profile

From your Xstream Agent Hub, click on *Profile* from the *My Business Center* tab. Here you will be able to update your contact information, update your billing info, and change your password.

## Training

Remember what we've said in previous lessons, always be learning! Xstream offers additional trainings under the *Training* tab on your Xstream agent hub for agents that want to specialize or expand their knowledge of the travel industry. We've included webinars from our vendors, current promotions, links to training courses for a few specialization areas (like weddings, group cruises, Disney, etc.), and direct links to vendor training for some of our vendors. You will also be able to review any of the Xstream University training modules. This additional training gives you the opportunity to enhance your knowledge and skills to grow your business.

## Knowledge Base

Our Knowledge Base is our FAQ page and has additional support articles and frequently asked questions to help you with your travel business. The Knowledge Base is located on your Xstream Agent Hub. Click on *Help/FAQ* under the *Tools* tab to be directed to the Knowledge Center.

## Resource Center

Your Resource Center is where you'll find the forms we've discussed in this handbook including the Credit Card Authorization/Client Acknowledgement Form, Hotel Invoice Form, and more. We've also listed resources you will utilize often like the travel.state.gov website which gives information on travel documentation, Mail Pound which provides agents with no-cost educational tools and brand marketing resources, TripAdvisor which is a travel website of reviews of travel-based products, and more.

## Travel Agent Suite

The Travel Agent Suite consists of two separate products but can work together to benefit you and your travel business. They are your CRM tool and a personal marketing website.



## Customer Relationship Management (CRM)

Who do you know? The first thing you do after you've started your business: tell everyone that you're a travel agent. You'll be surprised how much business you get just from telling people what you do. You want to make an organized list of prospects of everyone you know: friends, family, neighbors, doctors, mailman, anyone. You need their name, their phone number, and their address. All this information can be added to your CRM. It uses data to improve business relationships with clients, specifically focusing on customer retention and ultimately driving sales growth. If a client traveled to an all-inclusive and loved it, make a note of it. If someone is allergic to gluten, make a note. Little things like this make your clients feel very cared for, and they help you save time. As part of you joining Xstream Travel, we have provided to you a CRM software tool called VacationCRM.©

## Personal Marketing Website

We build it to be unique to you and your brand. Cookie cutter sites are bad for everyone. Prospective clients won't differentiate you from your competitors and returning clients won't find anything to excite them about traveling. We want to change that. Our sites offer an intuitive drag-and-drop interface. This lets you customize every page on your site to truly imbue it with your personality. Feeding your site is our immense Content Library. Our content is tailored especially for travel professional use, and all of it sends clients directly back to you.

# Part 5

## Xstream Policies

# Travel Professionalism

Although you are not an employee, you do represent Xstream Travel and your own business to the general public. Being professional means behaving courteously, honestly, and responsibly when dealing with clients, vendors, or other agents in a business environment. Conducting yourself with professionalism is necessary to establish a good reputation with vendors and your clients, which will determine the success of your business.

## Ethics

Business ethics is knowing what is right and wrong in a work or professional environment and choosing to do what is right. This can extend to every facet of your business. Here are some general guidelines:

- Travel agent discounts are a privilege and should never be advertised. Do not tell other guests the discounted price you paid because you're a travel agent. This includes prices for FAM trips.
- Never falsely advertise a price. For example, there is a method of sales called bait and switch. This is when you advertise a very low price that is not available, so you bait the customer to get them to contact you for details, and then you switch to a higher priced item. This is not only unethical, it's also deceptive and usually illegal.
- You are never to charge other agents for travel training or membership into professional organizations.
- Do not ask vendor representatives to come to your local meetings. Vendor relations are handled by the home office.
- Do not try to poach agents from other agencies or try and poach other clients to join Xstream Travel while on trips. They are on vacation, and you should respect them, and their time and money spent.
- If you can no longer handle a booking, turn the booking over to the home office by contacting us directly or submitting a Help Desk ticket.

## Social Media

Social media can be a wonderful and useful marketing tool. It's a great place to interact with your clients, share promotions, and grow your professional network. Remember, you are always representing yourself, your business, and Xstream Travel while online. Before you post, think of these 6 P's of online ethics:

- **Purpose:** Why are you sharing this information?
- **Privacy:** Who is going to see it?
- **Personal:** Are you sharing anything your client considers confidential and would not want you to repeat?
- **Professional:** How might this impact your image or the image of Xstream?
- **Permanent:** Once it's posted, it can never be taken back. Even deleting messages or posts does not guarantee the post cannot be accessed or was not saved by someone who saw it.
- **Price:** What kind of prices are you posting? Are they misleading? Would vendors be upset if they saw them posted?

## Appearance

Please always dress appropriately when you are working. This includes, FAM trips, meeting with clients, travel trade shows, boot camps, vendor dinners, conventions, Etc. For example, you do not need to wear a suit when visiting a property on a FAM trip, but please do not wear a bathing suit while representing yourself to a supplier. Please also maintain proper hygiene.

## Behavior

Please always conduct yourself with professionalism and integrity. Do not overdrink, overindulge, or curse when you are working or representing your business to the public. Please always treat others with respect, which includes being on time for meetings and appointments. Do not lie, engage in gossip, or slander others. It's a good rule of thumb to avoid conversations on politics or religion. You never know who you might upset. Lastly, when dealing with difficult situations, keep calm, be willing to admit to a mistake when they happen, and respond to situations with maturity. Remember, you are selling yourself first, travel second. Be what you expect from others.

## Confidentiality

As a travel agent, you are being trusted with confidential information that should never be shared with anyone expect when needed by a vendor to book. This includes:

- **Personal Information:** Names, birth dates, address, passport numbers, client's preferences (likes, dislikes, favorite activities, dreams) etc.
- **Banking Information:** Credit Card or other payment information. Keep all banking information in a secure location like a locked drawer or locked file cabinet. Keep signed credit card authorization /client acknowledgement form for at least one year after travel in case of any disputed charges.

If you have any questions, please contact us at 214-383-0122, or submit a Help Desk Ticket from your Xstream Agent Hub.

## Policies & Procedures

Please review our policies and procedures on a regular basis. These policies are put into place to streamline the operation and provide a better experience for all agents. All agents are expected to adhere to these policies and the clauses contained within the independent contractor agreement.

### Submitting Your Bookings

All bookings made with a travel supplier using the Xstream Travel booking credentials are required to be recorded on your Booking Desk in your Agent Hub. **Bookings are to be recorded on your Booking Desk once you have created a confirmation number or held group space with the supplier, regardless if a deposit is made or not.** Failure to record your bookings on your Booking Desk will result in a delay of supplier communication for your client, document delivery to the client and commission will be unclaimed on the booking. If your booking is not posted on the Booking Desk prior to us receiving the commission, you will be charged a \$10 research fee which will be deducted from your commission. Agents can submit bookings to your Booking Desk to receive unclaimed commission payment up to twelve months past due. In the event that after 60 days has past and you still have not received the commission, please submit a Commission Research Form located in your Agent Hub.

### Commission Payment

Agents will be paid any pending commission weekly on Friday afternoons after 4:00PM CST. Agents must be in good standing\* with Xstream Travel on the day of the commission run in order to receive their commission due.

\*Agents in good standing are those agents whose Xstream Travel account is paid to date, has fulfilled their agent agreement, and does not owe monies on an outstanding invoice.

### Commission Recalls

Suppliers will, at times, recall a commission previously sent to the agency. This can be done for a number of reasons including client cancellations, supplier cancellations, refunds, etc. If this occurs, the supplier will contact Xstream Travel requesting that a partial or full commission be returned. Xstream Travel will only notify the agent if the commission has already been paid to the agent. The agent can either repay the portion of the monies due or Xstream Travel may deduct the amount due from a pending commission payout.

### Collecting Payments

As an **independent contractor**, you must collect and apply all payments from your client toward their travel reservation. Agents will apply payment within the specific supplier travel agent site or with the supplier by phone. Agents will not act as the merchant themselves on any travel segment transaction.

Independent contractors are not permitted to collect monies for travel via any type of merchant account (PayPal, Square, Stripe, or Bank Account) and make payment through their own personal or business accounts. Independent contractors who charge service fees and adhere to their state's specific Seller of Travel Laws can transact those fees in a manner that suits the needs of their business. There are some states that prohibit ICs of SOT from collecting any payment directly from their clients for travel. Please refer to the Seller of Travel Laws for more information. Credit cards are the best way to take payment

from your client, as you can process their payment directly on the supplier's booking site. This way, there is no doubt that money has been applied, and the client may be entitled to additional insurance benefits (have your client check his/her cardholder benefits for automatic and/or added travel insurance protection). In addition, it makes operating your business much simpler. Make sure you always have your clients fill out a Credit Card Authorization Form, located in your Agent Hub in the Resource Center.

## Net Payments

All bookings made with Xstream Travel's credentials are to be paid to the Gross Total of the fare. This is the full retail amount of the travel. There are suppliers who list both the "Net" and "Gross" totals for bookings; this is most common on cruise bookings. The agent is responsible for knowing the difference and applying the gross total. The Gross amount does contain the commission total and that total will be recorded and paid to the agent.

## Payments on Personal Travel

Agents may pay "NET" for their own room or cabin. The agent's name must be on the booking in order for us to approve the NET rate. Any other rooms must be paid to GROSS. Any booking other than your own that is paid to NET is grounds for termination.

## Credit Card Charge Backs

Agents are held responsible for all processed travel transactions made to confirm their client's travel. The agent will be notified in a timely manner with details of the charge back. Agents are given an opportunity to provide proof of credit card authorization, contact the client for another form of payment or to make alternative payment arrangements. If the agent does not supply adequate authorization documentation, the bank does not accept the agent's documentation, and the client refuses or cannot make good on the payment, the agent will be responsible to repay the full amount. The agent will be given the option to repay the amount with future pending commissions due, or be issued an invoice for immediate payment. A payment plan can be discussed and until the amount is paid in full the agent's account will be placed on hold for commission payouts. Clients may file a claim for several reasons, these include but are not limited to:

- Client is not familiar with the name of the merchant (Supplier)
- Incorrect amount was processed from what they agreed to
- Client was not satisfied with services rendered
- Client was not made aware of the cancellation policy and terms of the supplier
- Client not informed of non-refundable fees
- Non-refundable deposits
- Bulk air
- Insurance premiums
- Fraud

## Working with Vendors

Agents are allowed to work directly with any tour operator/travel supplier of their choice; however, agents are making reservations under our ARC, IATA and CLIA numbers and therefore should not engage in any activity or action that may disrupt, hinder or cancel our relationship with any particular vendor. Xstream Travel must be noted as the Agency of Record and not the IC's company name.

If booking directly with a hotel or resort outside of using an approved vendor, please ask if they need an Xstream Travel invoice, Xstream Travel W-9, or Xstream Travel bank details. If so, please fill out the invoice form found in your Agent Hub and then submit a Help Desk Support ticket giving us the hotel's name, booking confirmation number or group name, the email address of the person at the hotel requesting this information and we will send them the additional requested information. If money is wired to us and we are charged a fee this fee will be passed on to you the agent.

## Registering with Vendors

Xstream Travel is registered with hundreds of suppliers. ICs can choose what vendors they want to work with to book their clients' travel. Upon receiving your New Agent Forms and completing your Xstream University Training, you may register with the vendor suppliers as needed per the instructions on the vendor list. Please know you do not need access to every supplier all at once. In fact, it is highly suggested that you don't. We encourage you to take your time with each vendor's training before moving on to the next vendor and starting to book travel. Many of these suppliers may not benefit your business depending on what you specialize in or sell. We don't want you to overwhelm yourself with information and burn out on vendors you may never use.

Agents should reference the Vendor List to ensure they are correctly registering with an approved supplier with the proper credentials. If the agent finds a supplier that Xstream Travel is not already registered with, you will need to submit a Support Ticket to Xstream Travel giving us the vendors name and website address. Xstream Travel has a vetting process and based on our criteria, may choose not to register with a supplier.

## Giving Your Agent ID When Making Reservations

When calling in a reservation an Xstream travel Agent must identify themselves to the supplier as working with Xstream Travel. Once the booking has been confirmed, that booking is to be immediately entered onto your Booking Desk. We have hundreds of agents throughout the country, many with the same first name.

Most suppliers normally forward reservation information directly to us. We in turn, forward this information on to the booking agent. In order for us to complete this process efficiently, we must insist that agents use their Agent ID, in lieu of your name, when making a reservation directly with the supplier.

## Changing Contact Information

You may not change any contact information on file with any supplier. Remember, when you are making reservations with suppliers, you are making them through our ARC, IATA or CLIA number. Do not give the supplier your company name. You may give them your personal email, or phone number as an additional contact for your reservation.

## Binding to Contracts

Independent Contractors have no authority to bind, obligate or commit Xstream Travel, by any promise or representation to perform services other than the transaction of travel sales, unless specifically authorized in writing by an authorized Xstream Travel manager. Any contract with a travel supplier on behalf of Xstream Travel, must be signed by an authorized manager. Agents should call into the office

when reviewing group contracts to ensure that Xstream Travel is being used in the correct manner and not being bound to attrition, penalties and guarantees.

### Client Complaints

The agent should take full responsibility for their clients and their bookings. If you are unavailable for an extended period of time, it is your responsibility to make certain your business is covered. Xstream Travel does not handle an agent's client booking in their absence, unless there are other mitigating circumstances. Agent's clients should not contact us directly for assistance with their booking. If an agent's client does call us, we will direct them to contact their individual agent. If Xstream Travel receives a client complaint, it will be forwarded to the agent for resolution. In rare instances, Xstream Travel will assist the client to get the matter resolved; however, it is the responsibility of the agent to handle and get the matter resolved in an expedited manner.

### Non-Disclosure, Non-Disruption and Confidentiality

The IC understands and agrees in return for receiving any information or materials written, verbal, or electronic concerning Xstream Travel and/or its affiliates, agrees to keep secrets and not to divulge, disclose or communicate, either directly or indirectly, to any person, firm, partnership, corporation or any other entity whatsoever any information concerning the matters effecting or relating to the business of Xstream Travel and/or its affiliates, including but without limitation to, the booking credentials of Xstream Travel (IATA, ARC, CLIA), trade secrets, selling, marketing and advertising procedures, past or present employees, past, present pending clients, agents, subcontractors and affiliates, recruitment and training plans, agent commission programs, daily operations, corporate policies and procedures, supplier and vendor commission and override contracts or any other agreements with these suppliers and vendors, and any other information that Xstream Travel and its affiliates may deem confidential.

At no time is the IC permitted to openly display the booking credentials of Xstream Travel. The IATA, ARC and CLIA are to be treated as your social security number and only be provided to a supplier for agency verification when requested. The Independent Contractor agrees not to act, or fail to act in any manner either directly or indirectly, that may cause the disruption of business, direct any business away from, and/or to cause discord to the business of and/or business relationships of Xstream Travel and/or its affiliates. Any such breach will result in immediate termination and forfeiture of unpaid commissions.

### Security Procedures

It is the agent's responsibility to take steps to prevent credit card fraud with their clients. When dealing with unknown clients, agents should request copies of their driver's license, front and back of the credit card, and obtain a credit card authorization form.

### Your Own Identity

Agents are required to obtain their own company/business identity. When dealing with your clients, you must operate under your own company/business name. You may represent yourself as an Independent Agency of Xstream Travel, but not as an employee, officer or manager of our company.





## XSTREAM TRAVEL INDEPENDENT CONTRACTOR AGREEMENT

### TERM OF AGREEMENT

Xstream Travel hereby makes available the business opportunity to the Independent Contractor to act as an independent travel agent for Xstream Travel and the Independent Contractor agrees to act in this capacity. Upon that date, or at the end of that time, this contract shall be extended automatically for twelve (12) months. However, if either party to this agreement serves the other with notice in writing thirty (30) days prior to the above-mentioned expiration, of their request to terminate the agreement and not to renew, then the agreement may be terminated.

### INDEPENDENT CONTRACTOR DUTIES

The Independent Contractor is hereby retained by Xstream Travel as a self-employed individual or entity to sell travel and travel services on behalf of Xstream Travel.

All agents will be required to take the continuing education XTU training. No agents should be conducting travel training classes, webinars or calls unless all material is approved by Lori Speers in advance of training.

### INDEPENDENT CONTRACTOR COMPENSATION

Compensation for the services rendered by the above-named Independent Contractor shall receive payment of commissions on sales as is stated following:

#### COMPUTATION OF COMPENSATION

A. The Independent Contractor shall be entitled to payment of commissions at 60% - 85% percent of the gross commissions depending on the package purchased including overrides realized by Xstream Travel for sales of travel and travel services by the Independent Contractor named in this agreement with standard program. Unless the Independent Contractor is using 25% referral commission plan, or other as specified. It is understood that all expenses and costs of these sales shall be borne by the Independent Contractor unless agreed to in writing and signed by both parties to this agreement.

## IATAN OR CLIA NUMBER USAGE AND COMMISSIONS

As is stated, an Independent Contractor is free to do business with any other travel supplier of services. If the Independent Contractor uses Xstream Travel's authorized International Association of Travel Agents Network number (IATAN) or Cruise Lines International Association number (CLIA) to sell travel, then the Travel Agent is due its share of the commission paid by the travel supplier or vendor as is set forth in Subparagraph above.

The above named Independent Contractor shall be paid when commissions are received by the supplier, and after the travel date. Xstream Travel shall provide said Independent Contractor with a thorough accounting of all commissions earned, and all expenses incurred and attributable to those specific sales. The Independent Contractor is not allowed to have any supplier pay commission directly to the Independent Contractor, it must come through Xstream Travel.

## HOURS

The above-named Independent Contractor has the right to work any number of hours she/he wishes to do so. Xstream Travel shall have no fixed hours required of the Independent Contractor. The Independent Contractor shall not be required to attend any office meetings or staff-training sessions. The Independent Contractor has the right to work at their own schedule of hours.

## BUSINESS SUPPLIES AND MATERIALS

The above-named Independent Contractor must provide her/his own business supplies and materials for doing business. The Independent Contractor shall be responsible for purchasing any and all promotional materials, such as business cards, letterhead, and any other materials needed to promote their business.

## PLACE OF BUSINESS AND WORK

The above-named Independent Contractor may make any and all decisions in regard to where they perform their work and or sales activity.

## PROFIT POTENTIAL

The Independent Contractor enjoys the opportunity and right to earn profit (profits) yielded by commissions that are earned pursuant to this agreement.

## THE RISK OF LOSS

The Independent Contractor takes full responsibility of assumption of risk of loss in the event that her/his sales commissions do not cover their incurred expenses.

## HIRING OF ASSISTANTS BY THE INDEPENDENT CONTRACTOR

The Independent Contractor has the right to hire or employ or constitute an agreement with other individuals for the purpose of accomplishing the goals she/he feels necessary for their business. The Independent Contractor incurs all expenses for said persons as will be outlined in their separate agreements.

## NO VACATION OR OTHER BENEFITS

The above-named Independent Contractor is a self-employed individual and shall not receive or earn sick pay, vacation, or other such employee related benefits from Xstream Travel.

## CUSTOMER OWNERSHIP

It is understood and agreed upon that all customers and/or clients of the Independent Contractor are and shall be the sole property of the Independent Contractor. In the event that the Independent Contractor ceases to have an association with Xstream Travel, then any or all customers / clients of the Independent Contractor shall have the freedom to do business with the Independent Contractor or any such travel agency they should desire. Confirmed bookings are owned by the agency (Xstream Travel).

## RESPONSIBILITY OF TAXES & FILINGS

The above-mentioned Independent Contractor shall take the responsibility for complying with any and all local, state and federal laws as they pertain to the performance of this agreement. This shall require the Independent Contractor to obtain any or all necessary business licenses, state registrations and to pay all tax payments (federal, state, and local income taxes) as well as payments of any applicable fees, E & O insurance or charges for social security, worker's compensation and FICA. Xstream Travel will assist those agents residing in States requiring Sellers of Travel licenses in obtaining exemptions whenever possible. The Independent Contractor shall submit proof of E&O coverage or be added to our rider. Whichever you choose to do. All agents are automatically added to our rider.

## TERMINATION OF AGREEMENT

### TERMINATION EVENTS

This agreement is not to be terminable prior to its expiration at the will of either party to the agreement, but is terminable for the following reasons:

The death of the above named Independent Contractor or cessation of his travel business entity.

The continued inability or incapacity on the part of the Independent Contractor to the performance of her/his duties as outlined in this agreement.

The occurrence of certain circumstances that make it impracticable or impossible for the business of Xstream Travel to continue.

A failure of payment from the Independent Contractor to Xstream Travel which is owed to Xstream Travel by the Independent Contractor including payment of annual renewal fees within a thirty day period of billing such amount, if applicable.

The Independent Contractor does not resolve any complaints from its clients within 30 days of notification from the Xstream Travel that a complaint exists.

If the Independent Contractor is terminated for any wrongful act related to the travel industry, the Independent Contractor authorizes the information be disseminated to the travel industry verbally or in writing and consents to either communication.

If the Independent Contractor sends any monies to the supplier other than the client's credit card payment, or if the Independent Contractor receives a commission directly from the supplier.

The Independent Contractor is required to be in good standing with Xstream Travel to book and/or service your clients. This includes that your account must remain active to service your clients as an Xstream Travel Agent and must remain active in order to receive any pending commission. If the Independent Contractor account is not active or you are not in good standing with Xstream Travel, you are not entitled to service your clients, contact vendors, have access to vendors, or earn commission.

#### COMPENSATION-EFFECT OF TERMINATION ON COMPENSATION

In the event that this agreement shall terminate before the completion of the terms that are specified in this agreement, the Independent Contractor shall not be entitled to any further compensation as of the date of the termination. Commissions are paid to Xstream Travel, and all pending travel reservations are owned and will remain under Xstream Travel until completed.

#### SOLUTIONS

Any claims made or controversies that arises out of or in relation to this Agreement will be settled by binding arbitration in the County of Collin in the State of Texas.

#### LEGAL ATTORNEYS FEES & RELATED COSTS

If it becomes necessary to interpret the terms of this Agreement or if any action at law is needed to enforce or again interpret the terms of this Agreement, the party prevailing shall be entitled to reasonable attorney's fees, costs, and any other needed disbursements in addition to any other assistance to which she/he may be entitled. All actions shall be submitted for binding arbitration in the State of Texas.

#### GOVERNING LAWS OF AGREEMENT

This Agreement is and shall be governed by and construed according to the laws of the State of Texas. The State Courts in Collin County, Texas shall have exclusive jurisdiction and venue over all controversies arising out of or relating to this agreement.

#### ASSIGNABILITY

This Agreement is not assignable by the Independent Contractor.

#### VALIDITY-PARTIAL

In the event that this Agreement is found by a court of competence and jurisdiction to be invalid, unenforceable, or void, then the remaining provisions shall continue in full force without being impaired or invalidated in any way.

#### INDEMNIFICATION

The Independent Contractor agrees that it will defend, indemnify and hold Xstream Travel harmless from all fines, suits, claims, demands, obligations or actions of any kind, including costs and reasonable attorneys' fees by anyone allegedly arising from or connected with the Independent Contractor's operation of its business.

#### CREDIT CARD CHARGES

The Independent Contractor shall be liable for any and all charges placed on the credit cards of their own business customers in the event that such charges are declined or for which charges are paid and subsequently charged back for whatever reason, including, but not limited to, the unauthorized or fraudulent use of a credit card. Notwithstanding any other provision of the Agreement, reimbursement will be made seven (7) days from Independent Contractor's notification to Xstream Travel of such declined charges or charge-backs. The Independent Contractor shall be responsible for (1) keeping a client profile for each customer that uses "signature on file," and (2) keeping a signed document (which identifies by name each person who has permission to use the card and the billing address of the cardholder) on file that authorizes the Independent Contractor or a third party to charge their card without a signed UCC, or other valid credit card authorization format, for each transaction or unique travel occurrence. The Independent Contractor should not take in any payments in any other form (including PayPal) other than the required credit card authorization form using your clients credit card directly to the vendor.

The Independent Contractor paying to the net rate is grounds for immediate termination. It is not allowed to pay to the net rate on any reservation that is not your own, assuming requirements are met to be granted the travel agent rate.

#### NAME AND LOGO USAGE

Both the Xstream Travel and its logo are federally registered trademarks. They may not be used without the express written permission of the company. Use of our name or logo without written

permission, outside of mention in factual reviews or editorial context, is a violation of our trademark.

The Independent Contractor has no authority, under any circumstances, to commit Xstream Travel in writing. The Independent Contractor will make no representations to any clients or suppliers that imply the authority to bind Xstream Travel, nor shall Xstream Travel be liable to the Independent Contractor, or any third party, for any of the Independent Contractor's actions. In the event of any dispute, litigation, or legal expenses stemming from any transaction entered wrongly, the Independent Contractor shall be liable for all expenses connected with the dispute.

#### CONFIDENTIALITY

The Independent Contractor understands that any programs, ways of doing business, lists, passwords, agency codes, agent booking sites and all information in the online agent manual belong to Xstream Travel, and any release or unauthorized use of that information is prohibited.

The confidential IATAN/CLIA code that will be disclosed to the Independent Contractor is to be used only by the Independent Contractor and cannot be used after termination of contract. This number cannot be disclosed to any other person except vendors. Xstream Travel reserves the right to change, modify, or amend any of these terms, conditions, and notices without prior notice.

## Before you go, a letter from David Manning

Hello!

My name is David Manning, and I'm the owner and CEO of Xstream Travel. I wanted to reach out to say thank you for completing the Xstream Travel Agent Handbook! We hope this information informs and empowers you to begin your travel business with Xstream Travel. We'll help you learn more, earn more, and stay true to your own brand.

If you're new to the travel industry, welcome! You have partnered with the right host agency. By joining Xstream Travel we'll teach you to design vacations, build your own business, and create experiences of a lifetime for your clients. With Xstream Travel you have unmatched support.

If you're a seasoned home-based travel advisor, our full-service host agency provides the resources and support to further your success. We hope you'll take advantage of our established partnerships we'll share with you within the travel industry, all while helping you maintain your identity & helping your business thrive!

Welcome to Xstream Travel! We're looking forward to partnering with you, and I look forward to meeting you on our next [Xstream Xperience!](#)

David Manning  
CEO of Xstream Travel

