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Qualifying a client

Helping You Understand Your Client's Travel Needs Clearly



Qualifying a client is one of the most important steps in planning a successful trip. By asking the right questions, you gain a clear understanding of your client's preferences, expectations, and non-negotiables. This ensures that you present options that align with their vision and increases the likelihood of conversion and satisfaction and most importantly makes you more efficient.

Use this document as a reference during your initial conversations with clients, whether by phone, video call, or email. Throughout each section, we've included sample open-ended and leading questions to help guide the conversation and uncover valuable insights. These examples are designed to help you go beyond yes-or-no answers, build rapport, and truly understand what your client is looking for in their travel experience.

Step 1: Build Rapport

Start with a warm, genuine introduction. Building trust and connection helps the client feel comfortable and more open to sharing details.

Sample questions:

"Thanks for reaching out. I'm excited to assist with your upcoming trip. What inspired this travel plan?"

"Have you worked with a travel advisor before?"

Step 2: Understand the Purpose of the Trip

Clarify why the client is traveling, as the purpose of the trip sets the tone and direction for the entire planning process. Whether it's a milestone celebration, a romantic getaway, a family holiday, understanding the "why" behind the trip allows you to tailor the experience to match the client's emotional goals and expectations. It also helps you suggest relevant experiences, accommodations, and extras that will make the journey truly meaningful and memorable.

Questions to ask:

"What's the main reason for this trip?"

"Is it a special occasion like a birthday, anniversary, or honeymoon?"

"Would you describe this as a relaxing holiday, an adventure, a cultural experience, or something else?"

Step 3: Travel Style and Trip Pace

Understanding your client's travel style and preferred pace is essential to crafting an itinerary that feels comfortable and enjoyable for them. Some clients thrive on structured days filled with activities and sightseeing, while others prefer a slower pace with time to unwind and explore at their leisure. By asking thoughtful questions in this area, you can determine how immersive, active, or relaxed their ideal trip should be and tailor your recommendations accordingly.

Questions to ask:

"Do you enjoy having a full itinerary with sightseeing and tours, or would you prefer a more relaxed schedule?"

"Would you prefer group tours, private guides, or independent travel?"

"Are you open to trying new foods, or do you prefer familiar cuisine?"

"Would you like to explore hidden local gems, focus on iconic landmarks, or a mix of both?"

Step 4: Accommodation Preferences

Accommodation plays a significant role in the overall travel experience, so it's important to understand what your client values most in where they stay. Preferences can vary widely—from boutique hotels full of charm to large resorts with extensive amenities, or quiet villas with scenic views. Asking the right questions will help you determine not only the style and standard of accommodation they prefer, but also specific features that will make their stay more comfortable and enjoyable.

Questions to ask:

"What type of accommodation do you usually enjoy—boutique hotels, large resorts, bed and breakfasts, luxury villas?"

"Do you have a preferred star rating or hotel brand?"

"Would you like to be located centrally or in a more scenic or quieter area?"

"Are there any must-haves such as a pool, ocean view, balcony, kitchen, family-friendly amenities, or all-inclusive services?"

Step 5: Transportation Preferences

Transportation is a key component of the travel experience and can greatly influence how smooth and enjoyable the journey feels. Understanding your client's preferences around flights, transfers, and getting around once they arrive allows you to offer options that match their comfort level, budget, and travel style. Some travelers value convenience and efficiency, while others are open to more flexible or adventurous options. Asking the right questions here ensures every part of the journey is well-coordinated and stress-free.

Questions to ask:

"Do you prefer direct flights, or are stopovers acceptable?"

"Would you like to rent a car, use private transfers, or rely on public transportation?"

"Do you need assistance with airport transfers, rail tickets, or internal flights?"

Step 6: Travel Details

Before diving into the details of the itinerary, it's important to gather the core logistical information that will shape the trip. These foundational details ensure that you can begin researching appropriate options and avoid recommending anything that doesn't align with your client's basic requirements. This section helps you identify practical considerations such as travel dates, destination preferences, and documentation status, which are critical for accurate planning and quoting.

Destination(s) – are they set on a specific location or flexible?

Travel dates – exact or estimated?

Trip duration – how many nights?

Departure city or airport –

Number of travelers – include ages for children

Passport status – valid for six months beyond return?

Travel insurance – do they have coverage, or would they like a quote?

Open-ended prompts:

"Are your travel dates flexible, or are they tied to specific commitments?"

"Are there any must-see places or activities you hope to include?"

Step 7: Budget Discussion

Discussing budget early in the conversation is essential to aligning expectations and ensuring the options you present are realistic and appropriate. While some clients may feel hesitant to share a specific number, guiding the conversation with context and reassurance helps build trust and transparency. Understanding their financial comfort zone allows you to recommend the best possible experiences within their means, saving time and avoiding disappointment later in the planning process. A clear budget range also helps you identify opportunities to add value, such as upgrades or exclusive experiences, where appropriate.

Questions to ask:

"Do you have a total trip budget in mind?"

"Are you looking for a luxury experience, something mid-range, or are we working within a tighter budget?"

"Is there flexibility in your budget for special experiences or upgrades?"

Tip: If the client is unsure, offer context. For example:

"For a 10-day trip to Europe with 4-star hotels, guided tours, and flights, the average cost is approximately \$8,000 to \$12,000 for two people."

Step 8: Special Requirements

It's important to identify any special requirements early in the planning process to ensure every aspect of the trip is comfortable, safe, and inclusive for your client. This includes medical conditions, mobility considerations, dietary restrictions, and preferences for adult-only or family-friendly environments. By asking thoughtful, non-intrusive questions, you can proactively address potential challenges and recommend suitable accommodations, transportation, and experiences that meet their individual needs. This attention to detail not only builds trust but also enhances the overall quality of the trip.

Questions to ask:

"Are there any medical, mobility, or dietary needs I should be aware of?"

"Do you require accessibility-friendly accommodations or services?"

"Are you looking for adults-only experiences, family-friendly options, or a mix?"

Step 9: Past Travel Experiences

Understanding a client's travel history gives you valuable insight into their preferences, expectations, and level of travel experience. It helps you tailor recommendations that either build on destinations and styles they've loved in the past or introduce something entirely new, based on their interests. Learning what they've enjoyed—or not enjoyed—on previous trips allows you to personalise their upcoming journey with greater confidence and creativity.

Questions to ask:

"Tell me about a favorite trip you've taken—what made it memorable?"

"Have you visited this destination before, or will this be your first time?"

"Were there any elements of past trips you didn't enjoy that we should avoid?"

Step 10: Must-Haves and Deal Breakers

Identifying your client's must-haves and deal breakers helps you focus on what matters most to them. These insights allow you to prioritise the elements that will make their trip feel special and avoid any features that could detract from the experience. Whether it's a dream activity, a specific type of accommodation, or a destination they want to avoid, understanding their non-negotiables ensures your recommendations hit the mark.

Questions to ask:

"What would make this trip feel truly special or successful?"

"Are there any non-negotiables or things you definitely want to avoid?"

Step 11: Communication Preferences and Timeline

Establishing how your client prefers to communicate—and their ideal planning timeline—helps set clear expectations from the start. Some clients like frequent updates and detailed discussions, while others prefer a hands-off approach with concise summaries. Clarifying preferred channels, decision-making pace, and planning milestones allows you to tailor your service and maintain smooth, efficient communication throughout the booking process.

Questions to ask:

"Do you prefer communication by email, phone, or messaging app?"

"When are you hoping to have the trip confirmed?"

"Would you prefer a custom itinerary built from scratch, or are you interested in a pre-designed package or tour?"

Step 12: Travel Extras and Enhancements

Offering travel extras and enhancements is a valuable way to elevate your client's experience and differentiate your service. These optional add-ons provide convenience, comfort, and unique opportunities that can transform a good trip into an exceptional one. Presenting these options thoughtfully allows clients to personalise their journey further while adding value to your overall offering.

Examples of travel extras you might suggest include:

- Travel insurance for peace of mind
- Visa and documentation assistance
- Airport lounge access for a more comfortable wait
- Early check-in and late check-out options
- Private experiences or special reservations
- Pre- or post-tour extensions to maximise the trip
- VIP arrival and departure services for a seamless experience

Final Step: Recap and Next Steps

After the conversation, send the client a summary email outlining key preferences and details. This confirms your understanding and provides a professional record of the discussion.

Example Summary Email Format:

Thank you for speaking with me today. Based on our conversation, you're planning a 10-day trip to Italy in late September for two adults. You're looking for a mix of culture and relaxation, with 4-star accommodations in central locations. You prefer private tours, are open to train travel, and would like to stay within a \$9,000 budget. I'll begin researching options and be in touch shortly with a proposed itinerary.

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