



# QUALIFYING THE CLIENT BOOKING FORM

## LOGISTICS

Dates: \_\_\_\_\_ Duration: \_\_\_\_\_ nights  
Budget: Land \_\_\_\_\_ Airfare \_\_\_\_\_  
Destination(s): \_\_\_\_\_  
Preferred Airline Carrier: \_\_\_\_\_ Preferred Airline Class of Service: \_\_\_\_\_  
Travelers: # adults \_\_\_\_\_ # children/ages \_\_\_\_\_

## CLIENT TRAVEL PREFERENCES

Resort style:      Boutique      Modern      Traditional for the destination      Condo or Muli Bedroom      All-inclusive  
Location preferences:  
                         City Center      Secluded      On the Beach if applicaple      View important

Do you want the hotel to be close to a town that has nightlife, shopping and restaurants?      Yes      No

What specific area do you want to be located in?

What amenities are important at your hotel - *Pool, spa, etc.*

Favorites from past vacations - *Hotels, destinations, activities...*

Would you like private transfers added to your package?      Yes      No      Car rental *if applicable*

*If yes, we need your cell phone number so the vendor can communicate with you at the airport if necessary and airline arrival and departure information if Classic is not booking the air.*

Experiences: *Once your clients have committed to their reservation with a deposit, you can ask what experiences they were looking for, for this vacation.*

                         Watersports      Historic sites      Adventures Tours      Culinary      Sail Adventure  
                         *Hiking, Ziplining, etc.*

Specific sites or sports:

## POINTS FOR DISCUSSION

Are you flexible (dates, length of stay, etc.) – to get exactly what you want?      Yes      No

If Yes, what date range is acceptable?

***I recommend Classic's optional travel protection, here's why...***

- 1. Cancel for any reason hotel penalties*
- 2. Refund credit card on file*
- 3. International medical coverage*
- 4. In-travel emergency support*
- 5. Lost baggage and missed connection coverage*

Special needs (mobility issues)

## SPECIFIC TRAVELER DETAILS

Clients' legal names\*      Birthdates\*      Passport Expiration Dates are not within 6 months before travel date  
\*as it appears on passport



# QUALIFYING THE CLIENT CHECKLIST

**BEFORE CALLING CLASSIC** – check our website to narrow down search to 2-3 hotels and categories

Legal names, as they appear on the client's travel documentation, are required to secure the air pricing and space. Please review the spelling of all names and travel details to avoid any inconvenience for your clients.

Be prepared:

With the spike in travel demand, please be ready with your clients' details for efficiency.

What destinations and hotels have you already researched?

Have you discussed property & category options with your client?

Let's make a booking today to reserve the price and space for your client.

Please be sure to review the itinerary for accuracy.

## GETTING STARTED WITH CLASSIC

Check to see if Classic would be a good fit for this client by researching our website:

[www.classicvacations.com](http://www.classicvacations.com)

Start a booking by calling, booking online, or using our Booking Request form.

Travel Advisor is responsible for checking the following for accuracy:

- Name spellings
- Room category
- Ages of children
- Rate inclusions/exclusions
- Travel dates
- Bedding request
- Seat assignments

[Review statements](#) to confirm all travelers' names and itinerary details.

Email [MinorChanges@classicvacations.com](mailto:MinorChanges@classicvacations.com) to add client cell phone number, FF numbers, make note of special celebrations.

Deposit to confirm space: \$20pp for land, & full payment on scheduled flights & travel protection.

Changes to the booking need to be made through the call center.

## AFTER DEPOSIT

5 days to add or delete [Travel Smart Plan](#) (TSP) trip protection for your clients.

Set reminder for final payment due date.

For flights, use the record locator to track schedule changes with airlines.

Hotel penalty dates, add these to your calendar or CRM to set reminders for yourself and clients.

Contact [Classic Concierge](#) 60 days before departure for any additional needs your clients' may have when the booking is \$10,000 or more.\*

*\*The exception to the \$10,000 minimum is Rail between the countries that Classic Vacation sells.*

## BEFORE DEPARTURE

### 30 DAYS

Make final payment – either call into Reservations or make payment online.

Check destination specific [health and safety protocols](#)

Send a link directly to clients via [Guest Payment Feature](#)

### 7 DAYS

Review E-docs with clients.

For clients, highlight Customer Service and [TripMate](#) numbers for in-travel emergencies.

Assist client in downloading airline apps to manage flight advisories & schedule and gate changes.

### 48 HOURS

Check destination specific [health and safety protocols](#)

Final Check flight information – check in for flight 24 hours prior – use airline websites or apps.

Reconfirm transfers, activities, & concierge components directly with the vendor or partner in destination.



# QUALIFYING THE CLIENT CHECKLIST

## CONTACTS AND RESOURCES

### EMAIL US

- [websupport@classicvacations.com](mailto:websupport@classicvacations.com)
- [conciierge@classicvacations.com](mailto:conciierge@classicvacations.com)
- [toursandactivities@classicvacations.com](mailto:toursandactivities@classicvacations.com)
- [groups@classicvacations.com](mailto:groups@classicvacations.com)

### CUSTOMER SERVICE

- [sjccustomerservice@classicvacations.com](mailto:sjccustomerservice@classicvacations.com)

### PRICE PLEDGE/COMPETITIVE ANALYSIS DESK

- [cvcomp@classicvacations.com](mailto:cvcomp@classicvacations.com)

### MINOR CHANGES\*

- [minorchanges@classicvacations.com](mailto:minorchanges@classicvacations.com)

\* Minor change examples:

- Update special requests (birthday, anniversary, honeymoon)
- Request bedding options
- Add Frequent Flyer/Trusted Traveler Number
- Add seat assignment requests for air segments
- Request an updated statement or documents to be sent electronically
- Request a revision on Trip Travel protection for the booking (add or remove Protection Plan before the deposit has been applied)
- Add or revise ground transportation on a booking (rental car or transfers only), but only when air/train/ferry/cruise info is provided in the email request

### CALL US

Call 800.221.3949 and press:

"1" for Payments, Online Booking Engine Support, Affiliate hotel assistance, Tours & Activities

"2" for Reservations (all destinations)

"5" for Extensions

"6" for Travel Assistance

### CALL CENTER HOURS

Monday – Friday: 6 AM – 5 PM PT

Saturday: 7 AM – 1 PM PT

Sunday, National Holidays: Closed

### CUSTOMER SERVICE

Call 800.243.6499 or 408.794.3499

24 hours / 7 days

### CONTACT US

ONLINE - Single Destination:

[www.classicvacations.com](http://www.classicvacations.com)

REQUEST FORM - Multi-Destination when the clients know exactly what they want:

[www.classicvacations.com/travel-agent/newbooking](http://www.classicvacations.com/travel-agent/newbooking)

## PRO TIPS

- A quote is a cost summary only. Price and availability are not reserved or guaranteed. Please contact the call center to reserve space for your clients.
- Once flights expire, the entire option will be canceled in our system, so better to hold land only, and then add airfare when you're ready to ticket and pay in full.

**Note:** rates are not guaranteed until booking is deposited and flights are ticketed.