



# Consultation Notepad

Start every consultation with:

Create a Connection

Have you used TA before?

Expectations of the ENTIRE Process

How I get paid

## The Basics

- Names: \_\_\_\_\_
- How many travelers and ages of children: \_\_\_\_\_
- Dates and any blackout dates if "flexible": \_\_\_\_\_
- Celebrations: \_\_\_\_\_
- Have you already seen something online you're interested in? \_\_\_\_\_

## Activities

- What do you like to do for fun? \_\_\_\_\_
- Any must-do activities? \_\_\_\_\_

## Transportation

- Private vs Shared transfers \_\_\_\_\_
- Car rental? \_\_\_\_\_
- Trains, ferries, etc.? \_\_\_\_\_

## Destination

- When you arrive, what is the first thing you want to do? \_\_\_\_\_
- Why did you choose X and have you ever been to X before? \_\_\_\_\_

## Lodging

- Room/Cabin Types? \_\_\_\_\_
- Any Must Haves? \_\_\_\_\_

## Flights

- Preferred airport or flexibility? \_\_\_\_\_
- Budget vs Main carriers: \_\_\_\_\_
- Basic Economy, Main Cabin, or First Class Flights? \_\_\_\_\_

## Budget/Fee

- Target budget: \_\_\_\_\_
- Scare point: \_\_\_\_\_
- Research and Design Fee

## Final Qualifying

- Disability or Mobility concerns? \_\_\_\_\_
- Passports? \_\_\_\_\_



Don't forget to end with:

- How did you hear about us?
- Timing of the Deposit
- Contact information for ALL parties
- Set the Presentation Date (3 days out)
- Set Proposal Expectations (All parties in front of a computer!)