Qualifying Travel Clients: A Step-by-Step Workbook

What is Client Qualification?

Client qualification is the process of gathering important information to determine if, how, and when you can successfully book travel for your client.

You are identifying:

- What they want
- What they can afford
- What they expect
- How ready they are to book
- If you are the right fit for them

Think of qualifying like being a detective + matchmaker.

Why Client Qualification is Critical

- Saves time (yours and theirs)
- Ensures happy clients (you deliver what they actually want)
- Reduces price-shopping and ghosting
- Helps you create proposals that convert
- Positions you as a professional, not an order-taker

Golden Rule: You can't sell the right trip if you don't fully understand who your client is and what they need.

The 7 Key Categories of Qualification

A. Traveler Details:

- Who is traveling? (names, ages, relationships)
- Special needs or preferences? (mobility, dietary, medical)

B. Trip Purpose:

- Why this trip? (celebration, relaxation, adventure, family, etc.)

- First time or repeat destination?

C. Destination & Experience Preferences:

- Where do they want to go? Open to suggestions?
- What type of experience? (luxury, adventure, cultural, wellness, family-friendly, romance, etc.)
- Must-have experiences or activities?

D. Travel Dates & Flexibility:

- Exact dates or flexible?
- How many nights?

E. Budget:

- Total trip budget (including airfare, accommodations, transfers, activities, insurance, meals, etc.)
- Comfortable range? (example: $5k-$7k, $15k-$20k)

F. Booking Readiness & Decision-Making:

- Have they booked with a travel advisor before?
- Are they ready to book now? If not, what's the timeline?
- Who makes the final decision?

G. Past Travel Experiences:

- What did they love or hate about past trips?
- Any travel deal-breakers?

The Qualifying Conversation Script

OPENING: Build Rapport

'Thanks for reaching out. Before I start making recommendations, I'd love to learn more about what you're envisioning.'

STEP 1: Who & Why

'Who will be traveling?'

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'What's the reason for the trip?'

STEP 2: Destination & Experience

'Do you have a destination in mind or would you like suggestions?'

'What type of experience are you looking for?'

STEP 3: Timing

'Do you have specific dates in mind, or are you flexible?'

STEP 4: Budget

'Do you have a comfortable budget range in mind for the full trip? This helps me make sure I'm recommending the best options.'

STEP 5: Booking Readiness

'Have you worked with a travel advisor before?'

'How soon are you hoping to have everything booked?'

STEP 6: Past Experiences

'Tell me about one of your favorite past trips. What made it so special?'

'Anything you definitely want to avoid this time?'

CLOSING: Set Next Steps

'Thank you! Based on what you've shared, I'll start pulling together a few tailored options and follow up by _____. Does that work for you?'

Red Flags & Green Lights Guide

RED FLAGS:

- 'I just want a ballpark price.'
- 'I'm talking to a few agents.'
- 'Can you beat Expedia's price?'
- 'We're not sure when or where yet.'

- 'I don't want to pay a planning fee.'

GREEN LIGHTS:

- 'We have a budget of $8k-$10k.'
- 'I'm excited to work with you.'
- 'I value expert advice and service.'
- 'We're flexible but leaning toward Italy in September.'
- 'I appreciate the value you bring.'

Qualification Worksheet Template

Traveler Details: ______________________

Trip Purpose: ______________________

Destination/Experience: ______________________

Dates: ______________________

Budget: ______________________

Decision Maker: ______________________

Booking Timeline: ______________________

Past Experiences: ______________________

Other Notes: ______________________

Practice Scenarios

Scenario 1:

A young couple reaches out about their honeymoon but says they're "just browsing" right now.

- What questions would you ask?
- How can you determine if they're serious?

Scenario 2:

A family of 5 wants to do an all-inclusive in the Caribbean but won't share a budget.

- How can you gently guide the budget conversation?
- What risks are involved if you skip the budget talk?

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Advisor Cheat Sheet: Quick Do's and Don'ts

DO:

- Ask open-ended questions
- Listen more than you talk
- Take notes
- Be upfront about your process
- Educate clients on your value

DON'T:

- Assume you know what they want
- Skip budget conversations
- Send proposals without full qualification
- Be afraid to walk away from poor fits

FINAL THOUGHT: Qualification isn't about selling - it's about serving. When you qualify properly, you serve your clients at the highest level.