Comprehensive Checklist for a Travel Agent Booking an Air Reservation

Ensuring a Seamless and Satisfying Air Travel Experience

Introduction

Booking an air reservation is a critical task for travel agents, requiring meticulous attention to detail and a thorough understanding of clients' needs. A well-crafted checklist ensures that every step, from the initial inquiry to after-travel support, is handled efficiently and professionally. This document presents a comprehensive checklist, guiding travel agents through all stages of the air booking process to deliver an exceptional client experience.

1. Understanding the Client's Needs

Before initiating any booking, it is essential to gather detailed information about the client’s travel preferences and requirements.

- Collect Personal Details: Full legal names exactly as they appear on their passports or REAL IDs, date of birth, gender and contact information.
- Travel Dates: Preferred departure and return dates, flexibility with travel dates, and alternate options if primary dates are unavailable.
- Preferred Departure and Arrival Cities: Confirm nearest airports and willingness to consider alternatives.
- TSA Precheck and/or Global Entry Numbers
- Preferred Airlines and Alliances: Frequent flyer membership numbers, preferred carriers, and alliance preferences.
- Class of Service: Economy, Premium Economy, Business, or First Class.
- Seating Preferences: Aisle, window, extra legroom, or special seating needs.
- Special Requests: Meals (vegetarian, vegan, kosher, halal, etc.), disability assistance, unaccompanied minors, or traveling with pets.
- Travel Companions: Confirm names and details for each traveler, including children and infants.

2. Researching Flight Options

Using the information collected, begin searching for the best available flight options.

- Use both TLN Snap as well as CENTRAV to compare rates and options. Keep in mind that Centrav does charge additional fees for ticketing, changes, etc.
- Compare Fares: Review direct and connecting flights, fare rules, restrictions, and baggage allowances.
- Evaluate Connection Times and Layovers: Ensure comfortable transfer times and minimize travel disruptions. No connections tighter than 90 minutes domestic, or 2.5 hours international as a best practice.
- Review Cancellation and Change Policies: Note refundable and non-refundable tickets, as well as change fees.
- Visa and Transit Requirements: Identify any visa or transit needs for connecting airports or destinations.

3. Presenting Options to the Client

Communicate flight options clearly and comprehensively to help clients make informed decisions.

- Prepare a Flight Itinerary Quote email: Include flight numbers, departure/arrival times, layover durations, and total travel time.
- Highlight Differences: Point out variations in fares, baggage allowances, seat selection policies, and onboard amenities.
- Explain Restrictions: Clearly state any limitations, such as non-changeable tickets or limited refunds.
- Discuss Loyalty Benefits: Detail potential mileage accrual or status upgrades.
- Provide Recommendations: Offer professional guidance based on experience, client preferences, and budget.

4. Confirming the Booking

Once the client makes a selection, proceed to secure the reservation by putting it on hold and finalize all details.

- Verify Traveler Information: Double-check names, dates of birth, and passport details for accuracy and validity. Passports MUST be valid for full 6 months plus 1 day AFTER the date of the clients return flight. **There is NO EXCEPTION to this policy!** If your client fails to have sufficient time on their passport, they must immediately get a renewal. You can book the tickets without the new passport information, but it will be their responsibility to provide it to you at least 72 hours prior to departure. Failure to have proper flight documentation is not grounds for any sort of refund or credit from UJT or the air carriers.

- Input Frequent Flyer Numbers: Ensure loyalty numbers are included to maximize rewards.
- Input Passport Numbers: Make sure that all data is correctly entered and matches the passport photo page EXACTLY. Letter for letter, and number for number.
- Select Seats and Special Services: Pre-reserve seats, special meals, and any required assistance.
- Confirm Baggage Allowance: Communicate checked and carry-on baggage limits.
- Review Fare Rules Again: Reconfirm cancellation, change, and refund policies before finalizing.
- Prepare the flight information in VCRM and send the invoice for client review and docusign using the SEND INVOICE APPROVAL button. **<u>Always make sure to put the appropriate flight disclaimers in VCRM invoice comment fields using the flight template saved in the system.</u>**
- Process Payment: After the client has docusigned and paid via VCRM, then issue the tickets.
- Issue Tickets: Process the payment with the supplier, add a service fee if desired, and submit the payment so the supplier will generate and send electronic tickets conformation to you. Add the airline PNR #s and e-ticket #s to VCRM in the “Airline Confirmation #” and “Invoice Comment Fields”

5. Communicating with the Client

Effective and timely communication enhances client trust and satisfaction.

- Send Booking Confirmation: Provide a summary of the reservation, including ticket numbers and flight details.
- Share Travel Tips: Offer advice on airport arrival times, security procedures, and travel best practices.
- Provide Emergency Contact Information: Include airline and agent contact numbers for support during travel.
- Remind About Check-In: Advise on online check-in availability and procedures.
- Alert to Changes: Monitor for schedule changes or disruptions and immediately notify the client.

6. Pre-Departure Checklist

Assist clients in preparing for their journey.

- Reconfirm Flight Status: Check for any last-minute changes or delays.
- Verify Travel Documents: Ensure all passports, visas, and tickets are accessible and valid.
- Assist with Special Needs: Double-check arrangements for mobility assistance, dietary needs, or other accommodations.
- Review Packing Recommendations: Advise on baggage allowances, prohibited items, and local weather.
- Share Destination Information: Provide insights on local customs, transportation, and emergency numbers.

7. During Travel Support

Remain available to clients throughout their journey for support during normal business hours, or provide them with TLN Snap Air After hours support number if they were booked thru Snap. There is no after hours support from CENTRAV at this time.

- Monitor Travel Progress: Track flights and proactively inform clients of disruptions.
- Assist with Rebooking: Help in case of missed connections or cancellations by contacting the supplier for rebooking assistance.
- Coordinate with Airlines: Liaise for lost baggage, delays, or other issues.
- Maintain Open Communication: Ensure clients can reach you for urgent assistance.

9. Post-Travel Follow-Up

After travel, following up ensures client satisfaction and helps build lasting relationships.

- Resolve Any Issues: Address complaints or concerns promptly and professionally.
- Financial Reconciliation: Match bookings with payments and commissions for accounting.

Conclusion

Air is an essential part of all vacation experience. By systematically addressing each step—from understanding client needs to post-travel follow-up— our agents can ensure accuracy, reliability, and the highest levels of client satisfaction. This approach not only minimizes errors but also fosters trust and repeat business, setting the gold standard for professional travel services.