

PROPOSAL & BOOKING Checklist

This Proposal and Booking Audit Checklist is an essential tool for every travel advisor.

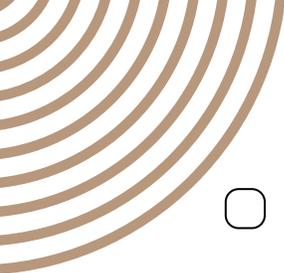
It's designed to ensure nothing gets overlooked—helping you deliver seamless, stress-free experiences for your clients. By using this checklist, you protect yourself from costly oversights while giving your clients the confidence that every detail has been thoughtfully handled before they set off on their adventure.

1. CLIENT INFORMATION

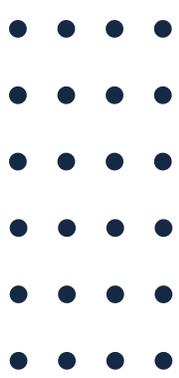
- Full names** (exactly as they appear on passports/government IDs)
- DOBs** (if applicable, ensure accuracy for any age-dependent pricing like child or senior discounts, etc.)
- TSA Precheck, Global Entry, or Known Traveler Number (KTN)** (if applicable.)
- Client's contact information** (email, phone number, address)
- Emergency contact information** (optional, but recommended)

2. TRAVEL DATES & ITINERARY OVERVIEW

- Departure and return dates** (ensure they are accurate and match the client's preferences.)
- Time Zone consistency for each destination** (ensure flights, transfers, and accommodations are all synced to the correct local time zone)
- Accommodation check-in and check-out times** (ensure they align with proper arrival and departure times)
- Total trip duration** (ensure they are accurately calculated, including all layovers or stops.)



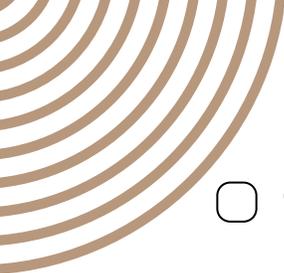
3. FLIGHTS



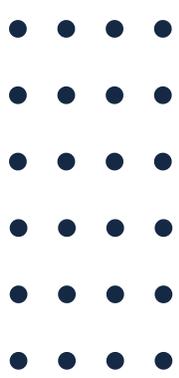
- Airlines and flight numbers** (ensure they are all correct and consistent.)
- Flight Times** (departure and arrival are accurate and will align with client preferences)
- Seat Selections** (if available and requested, ensure seats selected are according to client preferences such as aisle, window, or extra legroom)
- Baggage Fees** (include or clearly outline if additional; how many bags are allowed, and weight limits?)
- Flight Status and confirmation codes** (include this for easy tracking after ticketing)
- Any special meal requests** (for dietary preferences or restrictions)
- Layovers** (check the duration to ensure no missed connections and ample time for transfers)
- TSA and airport security guidelines** (especially if it's international travel with customs considerations.)

4. ACCOMODATIONS

- Hotel name, address, and contact information** (for each set of accommodations)
 - Room Type** (e.g., king, double, suite, etc)
 - Special requests** (e.g., ocean view, connecting rooms and accessibility needs)
 - Check in and check out dates/times** (ensure they align with flight and transportation)
 - Amenities** (include and request any consortia or promo amenities)
 - Inclusions** (such as breakfast, Wifi, parking, etc)
 - Gratuities and resort fees** (are they included or additional? If additional, inform the client)
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4. ACCOMODATIONS CONT...

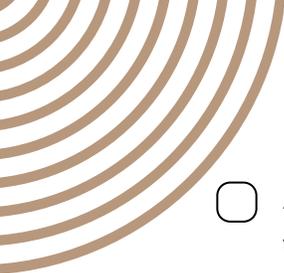
- Cancellation policy** (include any required prepayment or deposit notes and deadlines)
 - Late check-in/early check-out needs** (confirm these with the hotel if requested or needed)
 - Confirmation number** (include local confirmation numbers if you have them)
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5. GROUND TRANSPORTATION

- Confirm airport transfers** (is transportation included or booked to/from airport?)
- Transfer details** (driver contact information, vehicle type, pickup location, and time after confirming)
- Train Station Confirmations** (is transportation included or booked to/from train station?)
- Car rental details** (if applicable, confirm rental company, pickup/drop off times, and locations, car type, and insurance coverage)
- Public transportation passes** (if applicable, such as city transit cards or hop-on/hop-off bus tours)
- Private transfers** (if luxury or special arrangements are required, ensure vehicle type and time frames are confirmed and included.)

6. RAIL, TRAIN, & FERRY

- Train/Ferry tickets** (correct class, destination, departure, and arrival times)
 - Seat reservations are confirmed** (if required)
 - Baggage allowances** (check if there are specific restrictions or costs)
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6. RAIL, TRAIN & FERRY CONT...

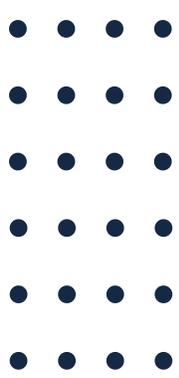
- Arrival and departure stations** (note any necessary transfer details to/from accommodations)
- Onboard services or upgrades** (class of service, meals, Wifi, etc)

7. TOURS, ACTIVITIES, & EXCURSIONS

- Activity details** (tour companies name, meeting point, start and end times)
- Confirmation numbers** (include contact details for local tour providers)
- Age Restrictions** (if any)
- Special requirements** (e.g., clothing, fitness level, or items to bring)
- Private vs. group tour** (ensure the client is aware of the tour type and class of service)
- Inclusions and exclusions** (is lunch, transportation, or gratuities included?)
- Cancellation policies** (include any required prepayment or deposit notes and deadlines)
- Activity tickets** (printed or mobile versions and/or vouchers provided to the client)

8. TRAVEL INSURANCE

- Insurance offered** (Always confirm if insurance has been offered and accepted or declined)
- Policy details** (what does the insurance cover: cancellations, medical, interruptions, baggage, etc?)
- Policy number & Emergency contact information** (ensure client has all necessary policy documents prior to departure)
- Premiums** (clearly communicate the total trip cost that was insured and the insurance premium cost to the client)

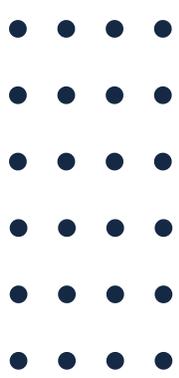


9. DINING RESERVATIONS

- Restaurant names, addresses and contact details** (after being confirmed)
- Reservation dates & times** (ensure they line up with client preferences)
- Special dietary requirements** (passed on to the restaurant)
- Prepaid meal packages** (if part of an all-inclusive plan, dining pass or package deal)
- Confirmed by and when** (make note of who booked/confirmed the reservation and when)

10. MISC. ADD-ONS & EXTRAS

- Gratuities** (included or additional? If additional, ensure client knows what is expected)
 - Baggage Fees** (are these prepaid, or will the client be paying upon check-in at the airport?)
 - Resort fees or service charges** (clearly communicate to the client, so there is no surprise upon arrival)
 - Special requests** (e.g., accessibility needs, baby cots, early check-in etc are noted and confirmed)
 - Travel visas** (if required for the destination, have these been discussed or arranged?)
 - Vaccinations or health protocols** (are there any entry requirements for vaccinations or health declarations for each destination in the itinerary?)
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FINAL DOCUMENT REVIEW

- All traveler names are correct exactly as per the passport or government ID.
- Travel document requirements confirmed (e.g., visas, passport expiration dates, etc).
- Correct nationality or residency details and TSA information.
- Verify **ALL** dates and times match for flights, accommodations, transfers, & activities.
- Cross-check time zones for all segments of the itinerary to avoid misalignments.
- Allow buffer time for transfers or connections, especially for flights & trains.
- Ensure the client has received a detailed copy of the proposal or booking confirmation.
- Obtain final sign-off from the client on all details before processing payment.
- All payment dates (deposits, final payments, etc) and the amounts have been clearly communicated.

AGENT NOTES