Reservation Sales Agent

New Implementation Training Reference Materials

REVINATE Lead Status and Call Results Flowchart

Overview

Every toll-free Campaign call answered through HUB automatically generates or “pops” a corresponding Lead Form. At that moment, an agent will need to determine if the call is a Lead or Non-Lead call. When in doubt, capturing even limited data on a Lead Form is a better choice than missing valuable marketing data. In both instances, the appropriate call result must be selected at the end of the call.

Lead Calls and Call Results

A Lead call is determined by a caller expressing a “desire to stay” or an interest in your property in any manner, even if the questions may seem to be “General Inquiries” such as “What is the temperature there in August?” or “When do you post your winter ski rates?” If the caller has dates of stay, is inquiring about a specific property or room type, is on your website and has questions or needs help booking, or expresses a desire to stay but cannot book at this time the call is considered a Lead and Lead Form should be completed. The Lead Status should be marked Follow Up, Booked or Not Booked and the corresponding call results should be selected – Hot Lead, Booked, Not Booked or Property Turndown.

Lead Form

When a lead form is required, the Lead Status should be updated with each call as needed to reflect the current situation or follow-up action plan. Lead Status is designed to change. However, Call Results <u>do not change</u>. They reflect the result of each unique Inbound Call scenario. Because Call Results accuracy is essential to many important metrics such as lead rate and call conversion, take a few moments during your wrap time at the end of each HUB call to be sure that you are choosing the correct Call Result and that the Lead Status on the Lead Form matches that disposition.

Non-Lead Calls

If a caller has questions about an existing reservation or any other matter such as an Owner Inquiry, Housekeeping matters, or billing question, then the call is considered a Non-Lead. The Lead Form that “popped” with the call should be cancelled and the corresponding call result should be selected. If your Manager, through call auditing, determines at a later time that the call was in fact a Lead Call, you can access your call recording and the specific corresponding blank Lead Form to create a lead.

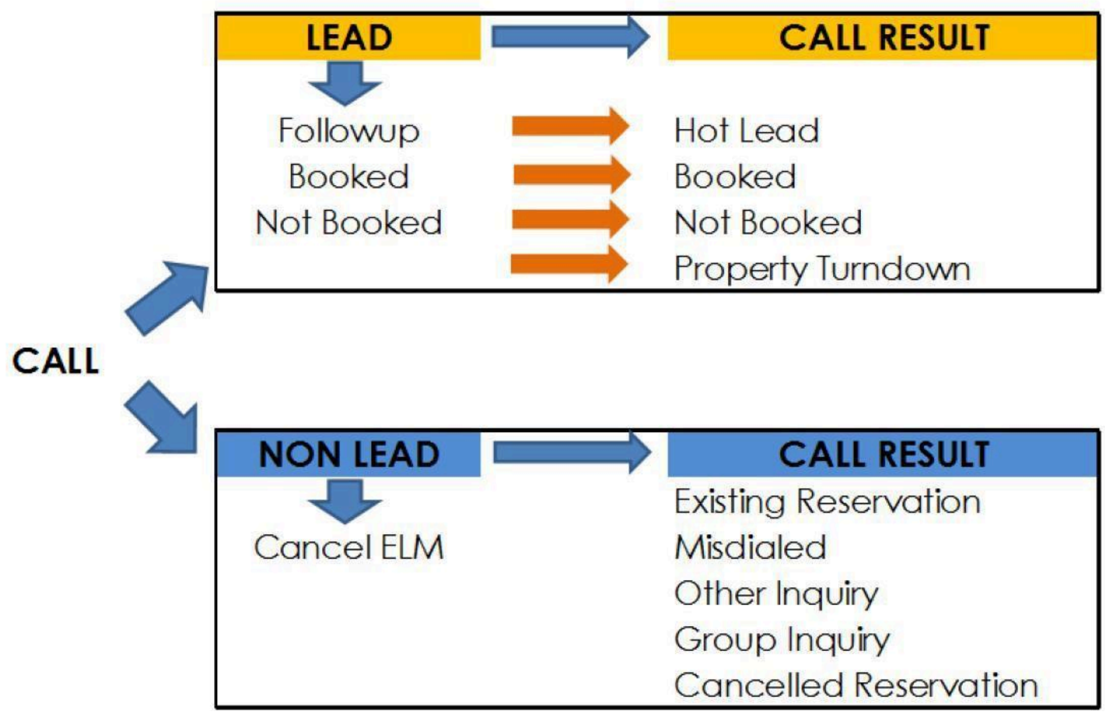
REVINATE default call results are listed on the chart below. Your Reservation Sales Manager can customize this list to include additional call results such as:

- Transfer
- Travel Agent / Wholesale Inquiry
- Gift Certificate/Comp Stay
- Group Inquiry.

Troubleshooting

REVINATE Reservation Sales Suite provides a number of Reports to assist you in repairing Compliance issues such as Lead Calls missing Lead Forms or Lead Forms with missing data. Compliance Report and Booked Lead Compliance Report both supply hyper-linked fields that take you into Inbound Call Tracking so you can listen to a call or access a blank or partially-completed lead form. However, when Call Results are incorrect, only your Manager can make these important changes. All changes to Call Results are recorded and tallied so taking care in choosing correctly is strongly encouraged.

Lead Status & Call Result Chart



REVINATE Reservation Sales Suite Q & A Tool

This tool is used as a guide for asking key questions when you are talking to a lead and entering information on the ELM (Enhanced Lead Management Lead Form).

May I have your first and last name please?

When are you thinking of visiting?

Have you been here before? Where did you stay?

Is there anyone else traveling in your party?

What are you planning on doing while you are here?

Do you have a price range in mind?

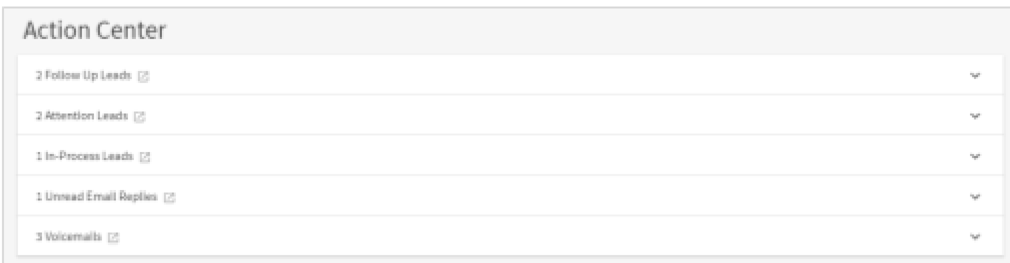
Other information

Results

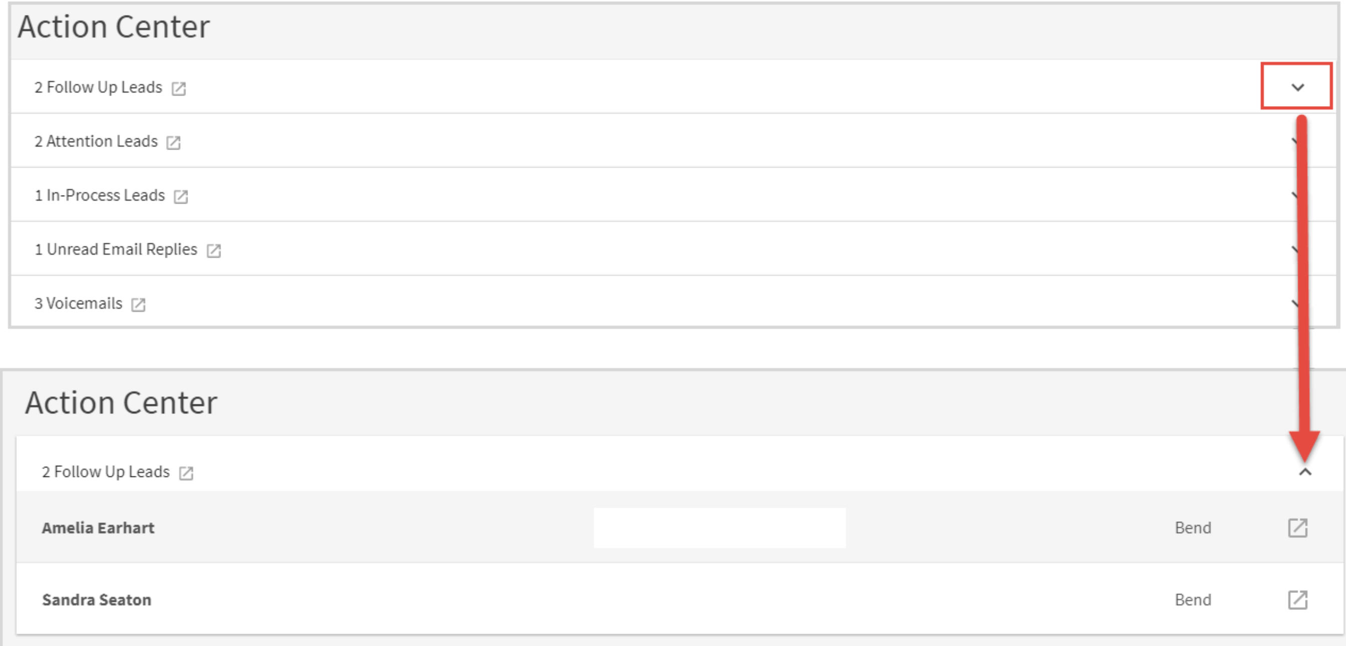
Recommended Agent Practices

This document provides a recommended list of agent practices to ensure their success in the REVINATE Reservation Sales Suite. Many of these practices have shortcuts to the Reservation Sales Suite through HUB using category or notification hyperlinks located within the “Action Center” portion of HUB.

From Top to Bottom:



- Attention Leads
- Unread listing inquiries
- Unread Emails
- In-Process Leads
- Follow Up Leads
- Unassigned RezForce Follow Up Leads
- Unreviewed Voicemails
- Unassigned listing leads
- Unassigned Email leads



Navigating Action Center

The Action Center holds the agent "To Do" list. Category notifications are updated in real time and will only appear when the correlating category contains an action item or notification. The items that appear in action center are specific to the HUB user upon login. Unassigned RezForce, Email and Listing (if available) Leads are available to the team and can be assigned automatically or through your Reservation Manager.

In the above image, clicking the menu arrow allows you to see notifications specific to each category. In order to see a full list, you would need to click on the icon in the title of the category. For instance,

clicking on the icon next to the category marked "2 Follow Up Leads" would take you into Reservation Sales to the specific report showing those Leads.

Review Attention Leads

This notification is set manually by you, your team or Reservation Manager to inform you a lead requires attention. If you are a RezForce client, you would see your assigned RezForce leads here as well.

Review Unread Emails

This notification shows you any unread email replies from leads assigned to you. This will occur only after you have sent an email to the guest directly from the lead form. Select the link to view your email replies in ELM. We recommend responding to emails within 2 hours.

Unassigned RezForce Leads

This notification shows you all unassigned RezForce leads with a lead status of follow up. All RezForce leads will come through with a status of follow up until changed by you or your team after handling the lead. We recommend checking your RezForce leads as quickly as possible.

Review In-Process and Follow-Up Leads

These notifications show you in-process and follow-up leads assigned to you. Throughout the day you need to follow up with your leads for any 2nd Chance Bookings.

To make a follow up outbound phone call, select "View/Edit Lead" and click the phone icon located next to the phone numbers in the lead form.

To send a follow-up email, click the hyperlinked "Email Address" category in the lead form.

Review Unreviewed Voicemails and Create Leads for Lead Calls

Throughout the day, review voicemails to identify lead calls for follow up. To listen to voicemails, select the voicemail category in the Action Center. This link takes you to Inbound Call Tracking in Reservation Sales and will automatically filter unhandled voicemails. After you have listened to the call, check "M/R**"** checkbox for "message reviewed". If the call was a lead call, select the "Create Lead" icon for the call and fill out a lead using the information the caller provided. ELM will automatically default to a lead status of follow up.

Unassigned email leads

Emails initiated from your resort/vacation rentals website will be sent here. Like your current process, they will be managed by a specific agent or everyone will be able to access these and address as needed.

Unassigned listing leads/ Unread listing inquiries

If you have auto assign set up, agents will simply see a notification of “1 unread listing lead”. If you do not auto assign listing leads set up and all agents can see unassigned leads, they will show in everyone's Action Center as an “Unassigned Listing Lead”. Once the agent opens the lead, it will auto assign to them and any additional inquiries from that guest will appear as a new listing inquiry to the assigned agent. You also have the ability to manually assign these leads.

Review Call Compliance Report

HUB > Reservation Sales Drop Down Menu > Call Compliance

Throughout the day, ensure leads are compliant. The Call Compliance report shows you, by agent, lead calls containing compliance issues. For more information on this report see the Call Compliance Report knowledge base article.

Review Leads for Auto-Completes

Check your Leads every day for Auto-Completes to ensure that no lead has expired without receiving appropriate attention. Go to Leads in Reservation Sales and choose “Auto-Complete” under the lead status drop-down menu. If additional contact is warranted, use Reservation Sales to call or email the customer even if the lead has expired. If the lead has not responded to previous follow up and is determined to be unresponsive, mark the Lead “Not-Booked” and choose the appropriate Not- Booked Reason.

Listen to Calls, Set UP Coaching Appointment and Review My Coaching Goals (Weekly)

HUB > Reservation Sales Drop Down > Inbound Call Tracking

HUB > Reservation Sales Drop Down > My Start Page> Tracking > My Coaching Sessions

We recommend taking an objective look at your own phone calls by identifying “good” and “opportunity” calls. You can record the date and time for your calls or you can save the call and send it to your manager. Full time agents will want to attend two coaching sessions per month with their manager. In addition, remember to review the goals you have set with your manager under the “My Coaching Sessions” section of Reservation Sales.

Understanding the Importance of Compliance

“Compliance” is the term REVINATE uses to refer to gathering key pieces of essential, valuable information from a caller whether they end up booking or not. The 3 elements of compliance are… **Email, Dates of Stay and Reason for Stay**. It may seem odd to not include “Name” and ‘Phone Number” as part of these essentials but, in truth, we get the phone number when guests call us and we likely get their name in the first few seconds of the call through a standard greeting such as

“Thank you for calling Bend Resorts. My name is Tim. May I have your first and last name please?”

The information we can NEVER GET without asking the caller are: **Email, Dates of Stay and Reason for Stay**!

Why such an emphasis on these 3 pieces of information? Simply this – *MARKETING GOLD*! Before REVINATE, in order to create a proactive marketing campaign, resorts and vacation rental companies could only reference the information they retained from previous guests stored in their Property Management Systems. Callers who expressed ANY interest in staying with them - those people who ask questions about rates, events, weather, special packages, etc. – would simply get their questions answered by agents and then… they would hang-up. When that happened, the resort or vacation rental company lost the ability to capture the kind of information that means EVERYTHING to future Targeted Marketing such as:

- What ad campaign did the caller respond to?
- What form of media made that phone ring – Magazine? Brochure? Radio spot? TV? Web?
- Why are they coming – Special Occasion? Romance weekend? Nature-lovers? Film Festival?
- What local or annual special event were they interested in?
- What time of year were they looking to come here? Summer? Fall? Winter? Spring?
- Who is coming – a couple? A Family? Business traveler? Skiers? Film-Buffs?

Knowing the answers to the above is why COMPLIANCE is so important. It is also why it is SO important to create a LEAD FORM for EVERY lead call that comes in, no matter how brief, no matter whether it is a *rate shopper*, someone asking about next year who is vague about their dates, someone in a hurry who doesn’t give you any chance to even begin to build to a sale. If they called in on a Toll Free number attached to a Campaign created in Reservation Sales Suite we want to capture that information so we can potentially use it later to generate more bookings and more REVENUE!

In order to have the *most accurate* data, and as much data as possible to reach out to callers and previous guests with PROACTIVE sales opportunities, your company needs the information that only the reservation sales team can capture!

As a Reservation Sales Agent, you have a hugely important and challenging job! You *and your team are the experts* representing your lodging options to callers who are relying on you to help them make a very important FINANCIAL and PERSONAL decision. Understanding the “why” behind your Agent Best Practices, including maintaining 97%+ Compliance, will not only add to your overall understanding of REVINATE, but help you take your reservation sales skills to an even higher level of proficiency and, in doing so, highlight the VALUE of your role and YOU to your Manager and Stakeholder.

Manual Call Scoring Template

Non-Negotiable and Description	Value	YES	NO	N/A
START WITH THE PROPER GREETING • Use the property's full name, state your own name, and ask for the guest's name.	5	☐	☐	☐
ASK OPEN ENDED QUESTIONS • Ask qualifying questions to identify the guest's needs. • Use information provided to build rapport and sell the experience.	10	☐	☐	☐
ENGAGE IN CONVERSATION • Use the guest's name conversationally, but discreetly throughout the call. • Use information learned through discovery or from past stays (using CRM) to build rapport. • Share a bit of yourself by giving them a local viewpoint.	5	☐	☐	☐
GIVE TAILORED RECOMMENDATIONS WITH CONFIDENCE AND PRIDE • Use information gathered to make recommendations tailored to the guest's specific needs. • Exhibit a genuine sense of interest and concern for the caller's satisfaction. • Lead the conversation and try to anticipate needs. Drive call with confidence and pride.	10	☐	☐	☐
MAINTAIN AN UPBEAT FRIENDLY TONE AND CADENCE • Use a pace that is appropriate, clear, confident, and mirrors the caller. • Maintain an energetic, enthusiastic, yet gracious tone throughout the call. • Be well spoken, avoid slang, phrase fragments, "dead air", and no "ums."	5	☐	☐	☐
ASK FOR THE RESERVATION • Ask for the reservation after effectively selling the tailored experience. • While this seems obvious, REVINATE data shows that agents skip this step 60% of the time. • Recap the reservation guidelines, deposit, and cancellation policies	10	☐	☐	☐
ATTEMPT TO OVERCOME OBJECTIONS • Overcome objections by leveraging urgency, requesting flexible dates, and asking additional clarifying questions. • In lieu of offering discounts, find alternative options to overcome the guest's objections to making the reservation.	5	☐	☐	☐

OFFER TO FOLLOW-UP WITH OUTBOUND CALL • Attempt to follow-up with a guest if they need to speak to another party prior to proceeding with securing a reservation. • Offer to set up a follow-up appointment.	10	☐	☐	☐
THANK THE CALLER • Politely close call with sincere appreciation and rebrands the property. • Offer additional assistance. Give anticipatory remarks.	5	☐	☐	☐
CREATE AN ACCURATE AND HIGH-QUALITY LEAD • Capture the guest's email address, dates of stay, and reason for stay. • Accurately fill in all the Lead fields (room, price quote, number of guests, and country). • Lead notes deliver accurate information with details, including any special requests.	10	☐	☐	☐

Total: 75 Points

Coaching Narrative: Use this area to provide additional feedback

Keep

:

Stop

:

Start

:

Setting Appointments and Outbound Follow Up

After your agents have met the 7 Non-Negotiables (especially interactive dialogue/ask questions and listen, convey confidence and pride/personal recommendations, ask for reservation) and they cannot book the caller, have the agent set an appointment with the caller to call them back.

Setting the Appointment

We recommend a 2-hour window for the appointment. The agent should assign the lead to themselves with a reminder for follow up.

An example script to use is: “As a courtesy I can call you back tomorrow after you have checked with X. Is between 11 AM and 1 PM a good time for you (find a window around the same time they called you)? Also, in case this property is booked during the time that we’re waiting for you to check with X I recommend identifying an alternative property.

Research Before Making the Outbound Call

Before the outbound call, the agent should check:

- Make sure their Agent Status is set to Project. The system will respond with an error message asking the agent to adjust their status if an outbound call is attempted in Ready.
- Ensure the caller did not book already with another agent or book online.
- Make sure the property is still available. If it is not available, then find alternatives. If an exact property was not identified, then find one or two properties based on the caller’s needs.
- Give the caller “value” by researching events going on during their stay or information regarding their reason for stay. For example, if they are coming for a wine festival, you may tell them about a special wine dinner going on at the same time.

Leaving a Voicemail

We recommend reminding the caller that their hold is about to expire. Or, if your company doesn’t hold properties, remind them that the property is still available but could book anytime.

For example: “I wanted to let you know that the property we spoke about is still on hold for you but that hold is going to expire _____.”

Or, “I wanted to let you know that the property you are interested in is still available but because we cannot hold properties during our high booking season so it could be reserved at anytime.”

Continue with: “I’ve also put a list of activities together for the area that <personalize based on your conversation> would enjoy.” For example, “Hi Matt, I just checked on your property and it is still available. I was thinking about our conversation yesterday…. Since you are coming for Spring Break you may want to check out XXX. I can tell you more about it when I speak to you next.”) The whole idea is to leave an enticing message that will make the caller want to call them back.

After you leave a message make sure that you **Add a Note** to your lead. Adding a note provides visibility to the rest of your team regarding your correspondence with the caller. Also, this updates the “Last Follow-up Date” in Reservation Sales.

Live Call

The agent should ask if the caller was able to follow up with any necessary steps before booking. For example, “That property is still on hold for you, would you like to reserve it? Okay, well that is a busy time of year and I would hate for it to get booked while you are waiting…” Again, add a note if you are not able to book.

How Many Times to Follow Up

We recommend that you call 2-3 times before they change the follow up status to “Not Booked”, depending on the rapport with the caller.

Booking the Lead in REVINATE Reservation Sales Suite

Once you book a lead from an outbound follow up call you will want to change the lead status to “Booked” in REVINATE Reservation Sales Suite. Then, make sure the booking method for Outbound Call is selected. This records the revenue for your outbound follow up phone call.

How to Close The Deal

One of the areas of primary focus for Reservation Sales Agents is the need to increase bookings by increasing conversion rates. Increasing conversion rates is one way that we can measure whether Reservation Sales Agents are increasing their bookings. But really, the overall objective is -- "*How* do we increase bookings" or more specifically "How can we convert more phone calls into bookings?"

There are many factors involved with convincing someone to book. Being friendly, and showing them what's available are some of the factors that come into play. These particular things are important but unfortunately, being friendly and showing the caller what's available isn't going to be quite enough to actually close the deal.

This short tutorial is designed to give you the basic tools to boost the number of bookings that you produce as a Reservation Sales Agent. It will give you practical examples and techniques that will help you to 'Seal the Deal' when someone is inquiring about a reservation.

Part 1 - Selling the Experience

It's important we understand that as a Reservation Sales Agent, you hold a role that requires you to be good at sales….and rightfully so. After all, we are selling a product with a price tag on it.

In the reservation sales industry, we are indeed selling a product, but it's actually much bigger than that. We are selling an overall *experience* for someone to have, and cherish for the rest of their lives. We know this, because most of the properties we present have relatively the same amenities.

When talking with the caller, it's important to keep this in mind because the majority of their decision of whether or not they buy from you is based on how good of a job you do at *conveying* this experience, and *connecting* it to their needs. In other words, the experience that you describe has to be in line with what their needs are.

Many times we do just the opposite and use what we call the "shot gun" approach. We get their stay dates, the number of people in their party and then we blast them with whatever comes up from the search. The industry term for this is called "feature flooding". I'll give you an example. "*Well sir, let's see….I have 37 properties that meet your requirements let me just tell you about the first one on the list….it has a hot tub, dishwasher, 2 flat screen TV's, 2 DVD's, a washer AND dryer, 4 bikes, a deck, a lawn, lawn furniture, a barbeque, fenced yard, water heater, electricity, and extra light bulbs!"*

Now, this doesn't mean you can't use some of these features to spark interest. There's just a proper way to do so in order to help with the sale. For example, if the vacation is a romantic getaway for a married couple then tell them *"I can recommend a wonderful property for your vacation. This home has a hot tub,* *and it actually is right on the deck off the master bedroom so you and your wife will be able to stare at the stars as you share a bottle of wine together."*

Or, if the vacation is a family getaway and they have kids, you can say, "*You said you were bringing your two kids. I recommend {property name}. This home actually comes equipped with 4 bikes (normally you have to rent them) so during your stay, you can take your family on bike rides around the lake together in the evenings and watch the sunset.*"

The only way we can respond in this manner is if we ask questions. If we ask good questions up front we will know exactly what best fits their needs so our response is "tailored" to their overall desired experience. If we don't do this, they really won't be interested in much of anything we have to say.

Basic questions like, "What brings you to the area?" or, "Have you stayed with us before?" are just a
couple things you should always ask to open up a dialogue with the caller. This will lead you into identifying what exactly it is that will heighten their overall vacation experience and position you to close the deal when the opportunity presents itself. This part is important because you always want to be two steps ahead of the caller.

As you ask questions it's important to identify what their emotional "hot buttons" are. Find it, and you will be amazed at how effective they can be in closing. Also, responding to them with genuine interest will help them feel good about themselves and therefore, feel good about buying from you.

Identifying specific "value added" reasons customers choose to book with you at this point is a good technique to "sweeten the deal" so to speak, showing them the overall value of what they may be potentially buying. Again, use the ones that particularly pertain to them and *their* personal needs and/or wants. Remember, we are selling an experience, not just a unit, so it's important to give them a picture of the overall benefits of staying with you.

Part 2 - Closing the Deal

After spending a few minutes finding out their needs, narrowing down the property and identifying their "hot buttons", it's time to "close the deal". The key to closing any deal is fully connecting what they are about to purchase, directly to their feelings and emotions. When you are successful at doing this, the person begins to envision themselves already there having a great time. Once you sense this has happened, this is the perfect time to ask for the booking. This part isn't easy, so this is where your self- confidence, charm and sometimes even wit will be required in order to "close the deal". This will take some practice but after a while you will get to be very comfortable with asking for the booking in any scenario.

There are several reasons why people hesitate when it comes time to book. Here are just a few of the most common ones with a recommended response to each:

Scenario 1: You've presented several options/properties and they need to run it by their spouse.

Response: *"Well, I understand that you would want to run it by your wife but based on your needs and what this property has to offer, I think your wife will be very pleased. Have you thought about maybe surprising her? Since I have everything up I can easily reserve this one for you now".*

Scenario 2: You've presented several options/properties and they need to run it by the rest of their party first.

Response: "*I understand you'll need to go over it with the rest of the folks in your party, that makes sense, but since I already have you on the line and everything is ready to go, I would love to be able to secure this particular one for you now and get it all taken care of while this one is still available".*

Scenario 3: You've presented several options/properties and they say they are just comparing prices
right now.

Response: "*Well, that's understandable. But I can tell you most of the properties in the area are relatively the same price based on what your needs are but renting with us gives you (add benefit statement here) which in turn, gives you more value for what you're paying. Are you sure you don't want me to secure this one for you now?"*

Scenario 4: You've presented several options/properties and none of them fit within their budget.

Response: "*Well, I know this property is a bit more than what you have budgeted but it certainly has everything you're looking for including (insert hot button here) that is really priceless when you think about it. Are you sure you wouldn't like me to secure this one for you now?"*

When you use these examples, be sure to use your personality when responding. These responses are not intended to be scripted by any means, feel free to tweak the words a bit to match your own style.

Conclusion

Now these practices don't work 100% of the time in all scenarios. But what we can guarantee is that if you work hard at training yourself to apply these practices to each of your calls, your bookings will increase. The amount of increase will depend on how proficient you become with applying these practices.

Overall, be confident in yourself, listen to the caller's needs, take good notes and be quick on your feet as you connect the experience with the caller's needs and emotions. Remember the things that your company offers that add value to the experience.