



# Automation Workflow Checklist

This checklist will guide you through the steps of setting up automation workflows for your travel business. Use this to streamline your processes, reduce manual work, and save time.

## Step 1: Identify Repetitive Tasks

Make a list of the tasks you do frequently that could be automated. Common tasks include:

- - Sending client follow-up emails.
- - Booking confirmations and reminders.
- - Invoicing and payment follow-ups.

## Step 2: Choose an Automation Tool

Select a tool like TravelPro Suite (TPS) to handle your workflows. Make sure it integrates with your existing systems (e.g., CRM, booking platform).

## Step 3: Set Up Automation Workflows

For each task, create an automation workflow. For example:

1. Follow-up Emails:
  - - Trigger: When a client inquiry is received.
  - - Action: Send a personalized follow-up email automatically.
2. Booking Confirmations:
  - - Trigger: When a booking is confirmed.
  - - Action: Send a confirmation email with trip details.
3. Invoicing:
  - - Trigger: After a booking is confirmed.
  - - Action: Send an invoice to the client automatically.



## Step 4: Test and Optimize

Before launching the workflow, test it to ensure it runs smoothly. Adjust any messages, timing, or triggers as needed.

## Step 5: Monitor Performance

Track how your automations are performing. Are they saving you time? Are clients responding better? Optimize your workflows based on feedback and performance data.

By following this checklist, you'll streamline your business, giving you more time to focus on client relationships and growing your travel business. Start with one workflow and build from there!



# Tasks Advisor Can Automate

## 1. Client Follow-ups

- Automate personalized follow-up emails to clients after they inquire about a trip, request more information, or complete a booking.
- Set reminders to follow up after specific periods (e.g., after a consultation or once a trip ends).

## 2. Appointment Scheduling

- Use an automated scheduling tool where clients can book consultations, discovery calls, or planning sessions at their convenience without the back-and-forth of emails.
- Automate appointment reminders to ensure clients don't miss meetings.

## 3. Booking Confirmations

- Automate the sending of booking confirmations and important trip details (e.g., flight information, hotel reservations, and itineraries) after a trip is booked.
- Set up reminders for upcoming trips, ensuring clients have all necessary information.

## 4. Invoicing and Payment Reminders

- Automate invoice generation and sending immediately after a booking is confirmed.
- Set up automatic payment reminders for clients, both before and after the due date to ensure timely payments.

## 5. Post-trip Thank You Emails

- After a client completes a trip, automate sending a personalized thank you email, which could also include a request for feedback or reviews.

## 6. Lead Nurturing

- Set up automated email sequences that nurture potential clients by sending useful tips, travel inspiration, or special offers over time to keep them engaged.
- Track when leads are most likely to book and use automation to follow up at the right time.



## 7. Social Media Scheduling

- Use automation tools to schedule social media posts ahead of time, ensuring consistent content delivery without needing to manually post every day.
- Plan and post trip highlights, special offers, and travel tips in advance.

## 8. Client Data Management

- Automate data entry for new client inquiries and bookings, syncing client details into your CRM system without manual input.
- Use automated systems to track client preferences, past bookings, and important dates (like anniversaries or birthdays) for future trip recommendations.

## 9. Marketing Campaigns

- Automate email marketing campaigns, such as sending newsletters, holiday promotions, or seasonal offers, to keep your business top of mind.
- Segment email lists and send targeted promotions based on client preferences or past bookings.

## 10. Task Management and Deadlines

- Set up automated task lists and reminders for important deadlines, such as booking flights, securing visas, or sending final trip details.