FOR INDEPENDENT TRAVEL AGENTS

The 30 minutes after “yes, book it.”

The selling is done. Now a second job starts, and everything you pin down in the next half hour is a fire you will not be fighting in three months. Assembled from conversations with working agents.

1 · Get the yes in writing

- [ ] **Written client approval** of the exact option: property, room, dates, price, what is included.
- [ ] **Names as per passports,** checked letter by letter now, not at ticketing.
- [ ] **Deposit taken or authorised** before you commit a penny to the supplier.

2 · Book it properly

- [ ] **Supplier confirmation number** saved with the confirmation email itself.
- [ ] **Read the confirmation against the quote.** Dates, board basis, rate. Discrepancies age badly.
- [ ] **Cancellation deadlines diaried,** with a reminder a week before each one.

3 · The money lines

- [ ] **Balance due date diaried** for the client, with your chase date set before it.
- [ ] **Payment schedule written down** if they are paying in instalments. Every instalment gets its own reminder.
- [ ] **Commission recorded now:** supplier, expected amount, due date. The first stated date is the terms. `most margin leaks here`

4 · One home for the booking

- [ ] **Everything in one place:** confirmation, invoice, payment plan, deadlines. CRM, spreadsheet or folder, but one place.
- [ ] **The email thread linked or filed** where the booking lives, so the paper trail survives you being on holiday.

5 · Set the chases before you forget

- [ ] **Supplier documents:** what is still owed (contract, vouchers, tickets) and the date you chase it.
- [ ] **Pre-travel check diaried:** a week out, confirm transfers and special requests with the supplier again.
- [ ] **Month end, reconcile:** commissions expected against commissions arrived, line by line. Short or missing gets a polite query the same week.

The habit that makes it stick

- [ ] Do this list while the kettle boils, every booking, same order. A week of honest minutes spent here saves an evening of chasing later.