

Name:

Phone Number:

Please select an action from the following options:

Follow-up call  Appointment  Booking

## Set up questions

How much time do you have to spend with me today?  
Have you booked or enquired with us before?  
What research have you done?

## Must have information

**Basic** questions specifically about their travel needs.

Where:

When:

Who:

How Long:

Stopovers:

Class of Travel:

Airline Preference:

Accommodation:

Transport:

Other:

## Experience (Picture Creation Questions)

**Clever** questions to engage in conversation and dig deeper on their travel needs. For example:

What would you like to experience on your holiday?  
Why have you chosen this destination?  
What type of travelling do you enjoy?

## Other things to consider...

Ask 'conversation based' questions and avoid 'do you want' questions.

### Insurance

Have you considered how you are going to insure yourself for such things as cancellations, medical & luggage?

### International Phone / SIM Card

How are you planning to communicate with friends and family whilst you are away?

### Travel Money

If international, how are you planning to access money whilst you are overseas?

### Building Expertise

Phone: (03) 9818 0076  
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info@cornerstoneps.com.au

Name: \_\_\_\_\_

## Selection & Matching Benefits

Present product that meets the needs of the client (the priorities that you identified through your clever questions in stage 2).

*Remember: **Features** describe facts & information relating to the product & **Benefits** explain why the product can help the client (meet their needs).*

**Valuable product that I have selected:**

**Why have I chosen this for the client:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Did I do this? Tick if yes:

