

## The Consulting Methodology

This process ensures that each client receives white glove treatment as they embark on their journey with TAOT.

Review the Client Intake Form

The Area Lead sends the Client intake Form. Look for critical information beyond the travel dates. Consider accessibility needs, and opportunities to “wow.”

Select a destination from the Travel Destination Wizard

Use the destination wizard to ensure that you select a location with existing TAOT contacts

Email your Travel Agent

Your Travel Agent will do the research. To facilitate efficiency, you must email your destination selection and the original intake form.

*Your travel agent compiles pricing and transportation options*

Your Travel Agent is responsible for price plans, transportation options, and excursions. They will email the finalized proposal to you within 2 business days.

Review the final proposal

Review the proposal. As Travel Consultant and owner of the client experience, you can request a new or revised proposal from the Travel Agent.

Contact your client

Reach out to your client to review the proposal.

Gather payment information

After the client is satisfied with the proposal details, gather bank information for payment and share it with the Travel Agent so reservations can be made.

Meet with your client

When reservations are finalized, meet with the client to review all details a final time. We recommend an in-person meeting whenever possible.

Be available for questions or emergency needs

In the week leading up to departure, during the transportation hours and 48 hours prior to return be available to answer questions or adjust travel details as needed.