

Being an Ethical Agent!

LEARN HOW TO BETTER
SERVE YOUR CLIENTS
AND YOUR BUSINESS
ETHICALLY!



What is an **ETHICAL AGENT**?

An Ethical Agent is an agent who follows steps to ensure their clients vacations are well planned, true to the clients needs, includes all travel requirements, and behaves and plans ethically.

Reasons to be an Ethical Agent

1. You will get referrals for always putting your clients first and taking great care of them.
2. You will earn a trust that ensures a life long partnership with your clients.
3. You will earn respect throughout the agent community.
4. Negative reviews and angry clients will be sparse which will continue your outstanding presence online to future clients.
5. Nothing like the feeling of knowing you did a honest stellar job!
6. In order to sell ROTW and UST you must complete Ethical Agent training.

Did you know that if you to a
great job your client will refer
your services to an average of 10
friends/family members!?

Being an Ethical Agent

Page One

- Never lose your cool with your client. Ever.
- Never work with clients who are already working with an agent. See our Copy and Paste page for a reply regarding this exact situation. If they are unhappy give them some ideas on how to reach out and better communicate.
- Do not trash talk other agents or agencies, including and most especially our agency! It will not make you look good to anyone, and you never know who you are talking to! Many agencies shop agents by pretending to be a prospective client.
- Do not trash talk any of our vacation suppliers. While it might make you feel better (we know) it will make you look poorly to your client. Also who want to book a vacation through a supplier your trust agent doesn't like.
- Do not break vacation suppliers rules. Such as dining hoarding via Disney dining or booking out dates to get the dining requests you want only to move dates in once you get the dining.

Being an Ethical Agent... continued

Page Two

- Do your due diligence before asking others for help. Use the search bar on the Agent FB Only page, see if anyone has asked that question before. Did you call the provider, did you research online?
- Never ask your client to break any rules and never break any rules for your clients. Rules are in place for their own safety. For example, sneaking guests into rooms already at capacity, adding spacers in shoes so a child can ride a ride, saying a child is 2 when they are 4.
- Never share client info with another client. Ever.
- Do what is best for your clients vacation... even if it means offering something like Fireworks package that is non commissionable. While you will not get the \$10.00 commission your client will love that they knew about it and that love of your services is what garners referrals!
- Do the right thing even when no one is looking!

Being an Ethical Agent... continued

Page Three

- Never talk about agent discounts and benefits to clients.
- You are not certified for anything regarding most vacation suppliers... you "specialize". For example with Disney.. you specialize in Disney, and you are a Disney College of Knowledge graduate. With Universal you are "specialized", with Royal you are a "master of adventure" and so on.
- Always put your clients' needs first! Even if that means offering them a lower priced package even though they approved a higher price point not know the lower price was available. Always do what is right for your client.
- Agents make mistakes.. and when they do... they fix it at all costs. This is why we have check lists, to prevent errors because we are responsible for our own actions and mistakes.
- When at agent events including at parks never show up in leggings and park attire. Respect your amazing job at being a travel agent, your agency, and your fellow agents.

Being an Ethical Agent... continued

Page Four

- Respect your clients' time. If you cannot get back to them right away be respectful enough of their time to let them know when you will get back to them. "I want to thank you for your patience, and I am working on an answer for you and should be back to you no later than tomorrow."
- Your clients are not travel agents.. that is why they hired you! So be sure to explain things as if you were talking to someone who is going to a location for the first time.. they most likely are. And never use acronyms that we use often in the industry... they will not know what BBB is.
- If you can get your clients a discount, get it. You should not have them come to you to get a discount, they came to you in the first place to book a great vacation and save them time and money... applying discounts they do not even know about is one way of fulfilling your obligation to them.
- Never ever add anything to a clients booking without their authorization such as insurance or Memory Maker. Be upfront about charges and always get it in writing if they wish to add or remove anything. Everything must be in writing. Tell them that is our corporate policy.

Being an Ethical Agent... continued

Page Five

- You are responsible for letting your client know what they need to travel. What do they need to get on the ship? What taxes will they be charged when leaving Mexico and where do they pay it and with what do they pay it? Do they need to book dining reservations at the Cancun resort they booked? Is there a dress code at their all inclusive? If there an immigration form that need to be filled out prior to entering Mexico.... provide that form for them to fill out before heading to the airport or have them do it online in advance.
- You are responsible for reminding clients of important dates and needs they may not realize they have such as airport pickup, park reservations, Disney and Universal dining and beyond.
- You are responsible for notifying your client the ins and outs of what they are booking or have booked! Is the deposit refundable or non refundable? What does the insurance cover and not cover? What Disney locations charge in advance for dining? Will their cruise line charge in advance or upon boarding for the excursions?
- Look ahead. If you know a resort is under construction let your clients know! Who wants to drop thousands for a pool view of an empty pool being resurfaced?

Being an Ethical Agent... continued

Page Six

- Learn what you sell. Suppliers are always changing policy and offers... did Royal change the app... let corporate know to update the PDF's for clients. We have to stay relevant.
- No matter what your clients spends or lack thereof as far as spending... treat them all the same. \$1000.00 may be petty cash to some while it is a lifetimes savings to another. Never judge your clients budget.
- Your clients are not you. Do not plan their vacation based on your like and dislikes. Base it 100% off them and ask them questions if needed to understand their needs so that you can book based on them.
- Remember clients are not trying to get under your skin with questions and needing constant clarification. They are excited and sometimes some clients need a little extra tender loving care. Just remember how excited you were for your first vacation! Who doesn't get super excited about an upcoming much needed vacation!
- Always be respectful with yes ma'am, yes sir. It would be my pleasure. I will get right on that.

Being an Ethical Agent... continued

Page Seven

- Watch for weather advisories. Is there a hurricane headed straight for them the day or week of travel? You should warn them and prepare alternate arrangements just in case.
- Watch out for their best interest. If they are headed to Mexico during June-November you should recommend travel insurance due to hurricanes.
- Always check for entry requirements. Some locations may still require vaccines including cruise lines! Some locations require masks as well. You need to inform them of all that they need to enter their country/location.
- Double check, double check, double check when paying towards a clients booking, when canceling a booking, and beyond. You never want to have to make the call to a client informing them that they just paid someone else reservation. You never want to make the mistake of canceling the wrong reservation and end up costing you and the client thousands of dollars. When booking Universal, ROTW, and UST they systems do not work like Disney. When you can it does not put the room back in inventory... it is gone and usually not returned for a long while. If you cancel by accident there may not be a room to move them to.

One big part of being an ethical agent is remembering that while we have office hours our job is to save clients money/time and one big way of doing this is by giving priority to quotes and clients needing to book IF we can even beyond our office hours. The reason why is because prices change nightly and waiting until the following day will cost your clients more money. This is not a requirement but it will guarantee you more bookings and clients because on average a prospect will move on within an hour or less to another agent who will quote and book them, or at the very least if they do not then you will be competing with another agent come the following morning.

Ethical Agent Test

Please visit the link below to submit your Ethical Agent test. This test is required for any agent to sell ROTW and UST.

Please click on the link below to complete the quiz

<https://form.jotform.com/230745973138059>