



AGENT ACCELERATOR

WORKBOOK AND SESSION NOTES
MARCH 24, 2024

In collaboration with:



Presented by:





A Message from Travefy's CEO

Thank you so much for joining Travefy's 2024 Agent Accelerator!

Last year's Agent Accelerator was our first-ever in-person Travefy conference, and we were overwhelmed by the positive response. With over 400 attendees, deep engagement throughout the sessions, and Happy Hour fun, the event exceeded our wildest expectations.

This year's Agent Accelerator goes further in every way and is designed to bring you even more insights and strategies to take your business to the next level! Get ready for a truly epic experience.

Our mission at Travefy is to power the success of travel professionals, and we have an unwavering commitment to the travel industry and to you. We're honored that Travefy is one of the world's largest Travel Advisor communities, and our team remains steadfast in our mission to support the growth of your business through innovative products and educational resources.

Today's Agent Accelerator educational program is a part of that mission. Whether this is your first Agent Accelerator or you're returning for the second time, today's curriculum will help supercharge your business with clear, actionable insights. And we'll also have a lot of fun!

Thank you so much for being a part of our second annual Agent Accelerator!

I also want to thank our partners at Travel Show Marketing Group, who share a deep commitment to our industry, for making this event possible.

Wishing you a great conference,

David Chait, CEO & Founder
David@Travefy.com



Sessions & Schedule

Session 1:

Marketing on a Budget: Strategies for Travel Advisors

Speaker: Stephanie Gries, Senior Education Manager - Travefy

- Defining Your Audience
- Channels and Strategies
- Estimated Costs

Bonus Resources: Session Slides (PDF), Marketing Budget Worksheet, Webinars, and more.

Session 2:

Harnessing the Power of Automation in Your Sales Workflow

Speaker: Scott Rutz, VP Sales & Marketing - Travefy

- Why Use Automation?
- Identifying Issues in Your Process
- Smart Automation Tips + Ideas
- Sales Process with Automation Examples

Bonus Resources: Session Slides (PDF), Sales Automation Workflow Example, Sales Workflow Webinar, and more.

Session 3:

Financial Strategies to Scale

Speaker: David Chait, CEO & Founder - Travefy

- Know Your Why?
- Financial Fundamentals
- Levers of Scale

Bonus Resources Session Slides (PDF), Financial Fundamentals Worksheet, Levers Templates, and more.



Agent Accelerator Bonus Resources

Scan this QR code to access tons of bonus materials including webinars, podcasts, session slides, worksheets and more!

Or go to:

<https://academy.travefy.com/agent-accelerator-2024-bonus-materials/>

Session 1: Worksheet

Marketing on a Budget: Strategies for Travel Advisors

Defining Your Target Audience

List your top three target audiences or customers.

1.	2.	3.

Reaching Your Target Audience

Channels, Tactics, Estimated Costs

Channel			
Tactics & Strategy			
Costs			
Estimated Total			\$

Session 2: Worksheet

Harnessing the Power of Automation in Your Sales Workflow

Evaluate Your Process:

What gaps or problems exist?	What are the most important steps?
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Planning Your Sales Workflow + Automation

Step	Action	Timing / Action	Automate?

Bonus Resources

Bonus Resources: Session Slides (PDF), Sales Automation Workflow Example, Sales Workflow Webinar, and more.

Session 3: Worksheet

Financial Strategies to Scale

Know Your Why?

What motivates you to be a Travel Advisor? (e.g., entrepreneurship, flexibility, financial goals)

Financial Fundamentals

Sales	What are the top two things I sell? 1. 2.	What are my top two sales channels? 1. 2.
Expenses	What are my fixed expenses? <i>Fixed expenses are your must have, can't cancel expenses like internet, rent, and more.</i>	

Levers of Scale

Prioritize them from 1 (top priority) to 4 (lowest priority).

Lever	Priority
Sales Leads	
Lead Qualification	
Sales Process	
Post-Sales Service	

Action Plan

Action	Deliverables / Needs

Bonus Resources

Session Slides (PDF), Financial Fundamentals Worksheet, Levers Templates, and more.

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