Harnessing The Power of Automation in Your Sales Process

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Like many of you:
I learned sales...
from nothing

I've learned a lot.

- Created playbooks
- Hired sales teams
- Work with **25,000+ brands**
- Learned universal lessons
- Spoken with thousands of travel advisors

Session Outline

- **Why** use automation?

- **Process** to build your automation steps.

- **Smart** Automation Tips + Ideas

- Sales Process with **Automation Examples**

- Final Thoughts **+ Sales Mindset**

Audience question:

We're here, learning together.

Let's **define** sales automation.

Sales Automation:

Sales automation acts as a **digital assistant**, helping salespeople manage **repetitive** tasks that **need to be done** in order to have a **smooth workflow**.

RAISE YOUR HAND IF:

Who currently uses any type of
Automation?

RAISE YOUR HAND IF:

Who here wants to start **using automation?**

Why use sales automation?

A study by McKinsey Global Institute found that using automation could **increase productivity by up to 40%.**

Sales professionals estimate they save around

2 hours and

15 minutes daily

using automation tools to automate manual tasks.

Automation lets you
become superhuman.

What's the value of automation?

Automation can:

- Give you **time** back

- Be the bridge to **growing** your business

- The key to **better** client experience

- Help **prevent** human error

Creating A
Sales Automation

Questions To Think Through

- What are the most **manual tasks** you have?

- What are **gaps** you have?

- What parts of your process do you want to **professionalize**?

- What are **requirements**?

- What steps ensure a **great client experience**?

Pro Tips For
Sales Automation

What are the most important aspects to your process?

- Timeliness or responsiveness?

- Quality and attention to detail?

- Documentation and process?

- Keeping clients engaged every step of the way?

- Clients going quiet?

What are the requirements and non-negotiables of your process?

Examples:

- Travel Insurance
- Passport/Travel Info
- Planning Fees
- Terms and Conditions

Don't automate the **best parts** of working with a **travel advisor.**

Session 2: Worksheet

What gaps or problems exist in your process?

What are the most important steps?

Sales Process Examples + Automation

Kerri Dickson

**Travel Advisor,
Sapphire Adventures LLC**

1. Client Inquiry Received
2. Client Info Form Sent/Completed ⚡AUTOMATE
3. Complimentary Consultation ⚡AUTOMATE
4. Service Fee ⚡AUTOMATE
5. Send Proposal ⚡AUTOMATE
6. Payments Discussion ⚡AUTOMATE
7. Client Planning & Touch Points
8. Final Docs & Travefy Itinerary ⚡AUTOMATE

⚡AUTOMATE *Task & Reminders

Dana Rubin

Owner, Dana Rubin Travel

1. Client Inquiry Received
2. Response: Client Form/Email ⚡AUTOMATE
3. Client Qualification
4. Phone Consultation ⚡AUTOMATE
5. Send Proposal / Options / Pricing ⚡AUTOMATE
6. Credit Card Authorization ⚡AUTOMATE
7. Completes Booking
8. Final Docs Sent ⚡AUTOMATE

⚡AUTOMATE *Task & Reminders

Example Workflow Automation + Tasks:

	Step/Action	Automation / Timing
1	Client Inquiry Received	When Received
2	Inquiry Reviewed/ Client Call	Within 24 Hours Of Inquiry
3	Planning Fee Collected	Send Immediately After Call
4	Quote Created / Approved	Within 1-2 Business Days
5	Confirmations & Insurance Waiver	Minimum 3-4+ Months Pre-Departure
6	Final Docs Sent & Itinerary	7 Days Pre-Departure
7	Pre-Departure Bon Voyage Message Sent	1 Day Pre-Departure
8	Client Check-in Post-Trip / Client Survey	2 Days After Return

Example Sales Workflow + Automation:

1. **Client Inquiry Received**
2. **Inquiry Reviewed / Client Call** ⚡AUTOMATE
3. **Planning Fee Collected** ⚡AUTOMATE
4. **Quote Created & Approved**
5. **Payment Authorization** ⚡AUTOMATE
6. **Confirmations & Insurance Waiver** ⚡AUTOMATE
7. **Final Docs Sent** ⚡AUTOMATE
8. **Pre-Departure Message Sent** ⚡AUTOMATE
9. **Client Check-in / Survey Post-Trip** ⚡AUTOMATE

Session 2: Worksheet

Planning Your Sales Workflow + Automation

Step	Action	Timing / Action	Automate?

Edit Task List

··· **Share** **Done**

Title

Sales Workflow Example

Labels

Type a label name...

Tasks and Automations

⚡ **Automatic Form - Service Fee Agreement & Credit Card Authorization Form** ✏️ ···

📋 **Follow-up On Service Fee Agreement + Process Planning Fee** ✏️ ···

📋 **Send Proposal** ✏️ ···

⚡ **Automatic Trip Invite** ✏️ ···

📋 **Follow-up On Proposal** ✏️ ···

⚡ **Automatic Trip Invite** ✏️ ···

⚡ **Automatic Form - Insurance Waiver Form** ✏️ ···

⚡ **Automatic Trip Invite**
7 days before trip start date ✏️ ···

⚡ **Automatic Trip Chat Message** ✏️ ···

EXAMPLE

Save to your Travefy account!

Automation in Travefy

Create Automated Workflows

Trip Invites

Tasks

Forms

Chat

Invoices

CC Auth

+ *More Coming Soon!*

Wrapping Up...

- **Be More Efficient**

- **Grow Your Team & Your Business**

- **Try It, Stick To It, Iterate**

Closing Thoughts

Stay In Touch

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