# Agent ACCELERATOR presented by Atravefy



# Harnessing The Power of Automation in Your Sales Process



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# Allow me to introduce... me.

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:**

**RAISE YOUR HAND IF:** 

### Travel is *not* your first career?

**RAISE YOUR HAND IF:** 

## You have *no* previous experience in sales?

# We're here, learning together.

### Let's define sales automation.

### DEFINITION

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.

Definition Reference: Zen Desk: https://www.zendesk.com/sell/features/sales-automation/?variantId=27288470837 **RAISE YOUR HAND IF:** 

# Who currently uses any type of **Automation?**

**RAISE YOUR HAND IF:** 

# Who here wants to start using automation?

DATA POINTS

# Why use sales automation?

### DATA POINT

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

Source: McKinsey Global Institute https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/the-economic-potential-of-generative second

### DATA POINT

# Sales professionals estimate they save around **2 hours and 15 minutes daily** using automation tools to automate manual tasks.

Source: Hubspot https://blog.hubspot.com/marketing/state-of-ai-report?hubs\_content=blog.hubspot.com%2Fsales%2Fs

# 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**.

**WORKBOOK TIME** 

### **Session 2: Worksheet**

What gaps or problems exist in your process?

What are the most important steps?

# Sales Process Examples + Automation

### EXAMPLE



### **Kerri Dickson**

Travel Advisor, Sapphire Adventures LLC

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

**FAUTOMATE** \*Task & Reminders

#### EXAMPLE



### Dana Rubin Owner, Dana Rubin Travel

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

**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:

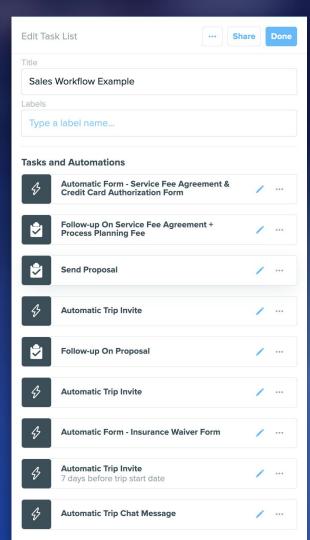
- 1. Client Inquiry Received
- 2. Inquiry Reviewed / Client Call **#**AUTOMATE
- 3. Planning Fee Collected **FAUTOMATE**
- 4. Quote Created & Approved
- 5. Payment Authorization **FAUTOMATE**
- 6. Confirmations & Insurance Waiver **#**AUTOMATE
- 7. Final Docs Sent *FAUTOMATE*
- 8. Pre-Departure Message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

### WORKBOOK TIME

### **Session 2: Worksheet**

### **Planning Your Sales Workflow + Automation**

Step	Action	Timing / Action	Automate?



### EXAMPLE

### Save to your Travefy account!





### **Create Automated Workflows**



# Wrapping Up...

- Be More Efficient
- Grow Your Team & Your Business
- Try It, Stick To It, Iterate

# **Closing Thoughts**





# Perfect is the enemy of good enough.



# Everything you do is sales.

## **Stay In Touch**



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