

Research with Intention: A Guide to Exceptional Research

At Travel With Awestruck, we don't just book trips — we design travel experiences that feel effortless, intentional, and unforgettable. That kind of magic doesn't happen by accident. It's the result of thorough, thoughtful research done behind the scenes.

The research process is where your expertise shines and your value becomes tangible. It's where you anticipate needs before they arise, uncover hidden gems your client didn't know to ask for, and prevent potential hiccups before they happen. In short: great research is what transforms a good itinerary into an extraordinary one.

Fortunately, our team has put in the hours, combed through the tools, and refined the process. This guide to research best practices brings all that insight together, so you can confidently design trips that delight and deliver.

As with all things in this business, there's no one-size-fits-all formula. This guide offers a strong foundation, but your process will evolve with experience. The goal is to find an approach that works for you — and that keeps your clients coming back, trip after trip.

Before you start...

You are coming out of a consultation call with loads of information. Take time to reflect before you dive into research. What differentiates great travel from Awestruck travel is our ability to surprise and wow our clients. To unlock those moments, you need to tap into what your client wants to *feel* — not just what they want to *do*.

Review your notes in detail and reflect on how you felt in your conversation. Ask yourself some questions to tap into how your clients feel, such as:

- **What was the tone of the conversation?** Were they excited or anxious? Enthusiastic or skeptical?
- **What are they hoping to get out of the trip?** Are they trying to relax, or fit in as many cultural experiences as possible?
- **What does this trip mean to them?** Is this a milestone moment, or just another vacation? Are they looking for a relaxing escape, or a bucket-list adventure?

Step 1: Research the destination

Clients rarely know what they want and exactly what they are asking for. It is your responsibility to do the diligence on the destination(s) they have in mind and respectfully guide them to alternatives if their proposed options are not suitable.

What to ask:

- **Are there entry requirements for this destination that I need to advise my clients to follow** (e.g., passport validity deadlines, vaccinations)? Will they be able to meet the requirements?
- **Is the weather in this location suitable for my clients' travel dates?** The last thing you want to do is send your clients to Southeast Asia in the midst of monsoon season, or island-hopping in Greece in March.
- **Are there any events that would prevent my clients from having an ideal experience?** Check for any festivals, crowds, and closures that might present an obstacle for your clients' dates/
- **Is this region safe for travel?**
- **Is this region welcoming to my clients?** Consider your clients' backgrounds and identities. If your clients are part of the LGBTQIA+ community and traveling as a couple, be sure that they are aware of and comfortable with the culture to which they are traveling.
- **Will my clients be able to have an exceptional experience in this destination while still respecting their budget?**

Where to look:

- Government websites (single source of truth for travel advisories and entry requirements)
- Tourism boards
- Blogs
- Search engines
- Your fellow TWA advisors (we have seen it all!)

Step 2: Begin to sketch out the itinerary

Using the information from your consultation call, begin to create the shadow itinerary. If there are specific cities, activities, or properties they have in mind, begin to develop an idea of how to sequence those activities to create the best possible experience, keeping in mind your clients' preferences on itinerary style (e.g., fast-paced vs relaxed and at leisure).

Step 3: Research preferred properties and suppliers

Travel With Awestruck is fortunate to be part of the Signature Travel Network, giving our independent advisors access to some of the best perks and partners in the world. These will become your trusted allies in crafting an exceptional custom itinerary.

Depending on the type of trip you are planning, your search may start in different places.

If you are planning an **all-inclusive, cruise, or resort-centered vacation**, you will want to start with identifying and pricing properties that are a strong match for your clients' needs.

1. **Begin your search for flights (if applicable) and accommodations with preferred suppliers.** These include Travel Impressions (through VAX), Classic Vacations, and Signet (Signature Travel Network partner properties). For details on how to maximize each of these platforms, please refer back to the "Basics" section of the Travel With Awestruck advisor support portal.
2. **Evaluate each potential property for fit with your clients' needs.** Check for:
 - a. **Price fit.** Ensure the property is in-budget for your client
 - b. **Location.** Is the property in the destination your client requested? Does it match the ambiance they were looking for (e.g., tropical vs high-rise)?
 - c. **Amenities.** Does the property have all of the amenities your client is looking for?
 - d. **Reviews.** Look at reviews across numerous platforms to understand property highlights and potential drawbacks. As you read reviews, work to ensure that the resort does not violate any of your clients' "deal-breakers" and that it excels at the areas most important to your clients. Trip Advisor is a great tool to do this, or you can always ask the Travel With Awestruck community. Our team has stayed almost everywhere worth staying in Mexico and the Caribbean, and can give you our firsthand reviews
 - e. **Style.** This is where knowing your clients beyond their straightforward answers becomes important. Does the property match your clients' "vibe" and aesthetic tastes? Is it similar to places they have stayed and enjoyed before?
3. **Augment the itinerary with excursions and activities.** Once you have narrowed down a list of 1-3 properties that are a good fit for your clients' needs, work with preferred suppliers to add any excursions, activities, and transportation that you discussed during your consultation call. Consult our preferred supplier list or use Signet to find additional suppliers if needed.

If you are planning an **FIT vacation outside of Mexico or the Caribbean**, many preferred suppliers will bundle accommodations and touring into complete packages. Start your search by contacting preferred suppliers.

1. **Begin your search by looking for preferred suppliers.** You can find a list of Travel With Awestruck preferred suppliers in our resource bank, and a list of all Signature Travel Network preferred suppliers on Signet. You can filter suppliers based on location, budget, and travel style, then review their profiles within Signet to find the best fit for your clients' needs.
2. **Contact preferred suppliers and share your clients' needs.** Use the forms within Signet to contact suppliers, unless we have provided a different point of contact in the resource bank. Share with them as much detail as possible about your clients' needs, so they can guide you towards the right itinerary that fits their preferences and budget.
3. **Receive a proposed itinerary from the supplier.** The suppliers you contact will respond with detailed proposals for transfers, excursions, activities, and usually hotels. Be sure to review these in detail.
4. **Work with preferred suppliers to refine the itinerary.** Once you receive initial proposals from suppliers, work with them to refine and add to the itinerary based on your clients' interests. You can almost always swap out activities, hotel options, and more, so do not be afraid to ask. This is where your expertise becomes critical.
5. **Augment the itinerary.** Add any remaining excursions, activities, transportation, and dining to the proposed itinerary. If the preferred supplier you are working with does not include hotels in their proposal, this is a good time to add accommodations as well.

Pro tip: Suppliers often mark up hotel rates when they sell hotels as part of packages. Check if the supplier requires you to book hotels through their package, and if they do not, ask them for the price of the package without hotels, then check the rates for the properties they quoted through VAX or Classic Vacations. It may be more cost effective to book hotels separately from touring. This has saved Travel With Awestruck clients thousands of dollars historically, especially in Europe.

Step 4: Give your proposal one final check

Before sending your proposal(s) back to your clients, complete a thorough check. This includes:

- **Check pricing for fit with budget.** Ensure you are reflecting the cost of all activities (and estimated flight costs) to avoid sending your clients a proposal they cannot afford.
- **Cross-reference your notes from your initial consultation with your proposal.** Make sure you have included all of the clients' most requested activities and avoided any dealbreakers.
- **Check the overall feel of the itinerary against your clients' preferred travel style and values.** Pull up the proposal with fresh eyes – does this *feel* like your clients?

Pro tip: Double check that the pricing you are quoting includes your commission. Many suppliers quote prices in “**net**” (the price of the trip without any commission). This means that you need to set your own commission, then quote the clients in “**gross**.” For example, if a supplier quotes a cost of **\$8,000 net** for a package, **this includes no commission for you.** If you want to make a 15% commission on the trip (\$1,200), **you need to add this to the total and quote your clients the gross cost of \$9,200.**

Step 5: Present a clear, branded, professional proposal

Visit the next module in our advisor support module to learn best practices for presenting your proposal to your clients.

Final guidance and best practices

- **Be thorough but efficient.** Limit "scroll time" by using a pre-made checklist. Save sources for future use in VCRM or in your own note platform to avoid rework later on.
- **Stay client-centric.** Don't overload with options—curate thoughtfully. Use their preferences to filter options and avoid bias. Remember that you are crafting the ideal itinerary for your clients – not for yourself.
- **Stay up-to-date on destination news.** Subscribe to travel newsletters, follow destination-specific social accounts, and attend the webinars that we organize with Signature Travel Network or our suppliers to build your base of knowledge on the products available in the market.
- **Build relationships with suppliers – in the back office and on the ground.** Take advantage of the incredible benefits of Signature Travel Network, and build a rolodex of go-to contacts at the suppliers and properties you sell most often. These personal relationships can make or break the experience your clients have in-destination.
- **Document everything.** Keep a clear research trail, and store your learnings in dedicated folders to avoid rework on future trips. Save feedback from past trips to inform future itineraries.

As always, please use our community as a resource, and do not hesitate to reach out with any further questions after reviewing this guide.