TRAVEL WITH
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From booking agent to trusted advisor: A Guide to Consultative Selling

At Travel with Awestruck, we pride ourselves on building deep, lasting relationships with our clients – not just selling trips. These relationships begin with the consultation call, which is why it is a crucial element to get right in the planning process. A poor consultation call can not only cost you a sale – it can cost you a relationship.

Fortunately, our team has seen it all, and we have put together this guide to consultative selling to share best practices, so that you can nail your next consultation call.

Keep in mind that there are many ways to be a successful consultative seller. This guide should be used as a reference for some common best practices, but it is up to you to find the style that is authentic to you and that resonates with your ideal clients.

What is consultative selling?

Consultative selling is a relationship-focused approach where the travel advisor acts as a trusted consultant, not just a booking agent. It emphasizes understanding your clients' needs over pitching them a canned proposal and co-creating their trip with them over selling a package.

What are the core principles of consultative selling?

1. **Listen. Listen. Listen.** This is the golden rule of consultative selling. If you are doing most of the talking on the call, you are doing it wrong. Know which questions to ask, then let your clients do the talking.
2. **Client-Centric Mindset**: Prioritize the traveler's lifestyle, goals, and dreams. Understand where they are coming from – not just the trip they want to plan.
3. **Active Listening**: Uncover both spoken and unspoken needs.
4. **Tailored Expertise**: Provide curated recommendations, not one-size-fits-all options.
5. **Value Over Price**: Emphasize exclusivity, insider access, personalization, and peace of mind.

6. **Trust Building**: Be transparent, responsive, and authentic. If you come in with a canned sales pitch, your clients will feel it. You are always better off being authentic and confident, even if that means you feel less "polished."

How should you structure your initial planning call?

Aim for 30 minutes, split into 5 natural "sections."

1. Warm Welcome (2-5 mins)

- Introduce yourself with warmth and authority
- Share a brief overview of how you work ("white-glove service," insider access, concierge-level support). Make sure this is authentic to you and who you are
- Ask the clients to introduce themselves as well

Tips and tricks:

- **Tailor your introduction to your clients' needs**. If you are speaking to a couple trying to plan their honeymoon, focus on telling vivid stories of your experience in the romance travel space – not on your experience selling group travel
- **Everyone has experience.** Even if you are new to the industry, talk about your experience as a traveler to the destination they have in mind. Share prior event planning experience. Lean on Travel with Awestruck if you need to do so ("At Travel with Awestruck, our team has decades of combined experience in XX space")
- **Be genuine.** Never misrepresent yourself or your background to clients

2. Understanding the Client (10 mins)

Before you dive straight into the trip, get to know your clients as people to understand what they are looking for at a deeper level than trip logistics.

Choose a few open-ended, lifestyle-oriented questions to uncover motivation, preferences, and unspoken desires.

Here is a sample of some questions you can choose from to get started (do **not** try to ask them all):

- "What inspired you to start planning this trip?"

- "How do you want to *feel* during and after this journey?"
- "What kind of experiences do you love most when traveling?"
- "Are you more drawn to well-known icons or hidden gems?"
- "Tell me about your favorite past trip — what made it unforgettable?
- "Anything you *wouldn't* want to repeat?"
- "Is this trip about adventure, rest, connection, celebration… or something else?"
- "Who else is coming, and what does *their* dream version look like?"
- "What level of structure do you like — lots of planning or room for spontaneity?"
- "How do you define luxury? (Service, space, privacy, experiences?)"

Tips and tricks:

- **Mirror key phrases your client uses**. This builds subconscious rapport and trust
- **Take notes**. All of these answers will help you create an awe-inspiring client experience down the road, and kick start a long-term relationship. Imagine this – your client mentions on your initial planning call that they love fine dining, and you surprise them with a private dinner in-destination. If you want your clients to say, "I can't believe she remembered that" on their trip, this is the time to listen intently. This understanding of your clients as people takes their trip from "exactly what I asked for" to "life-changing, I will never book without her again"
- **Keep an eye on the clock**. Once your client starts answering these questions, it can be easy to get carried away learning everything you can about them. Make sure you choose a select few questions (no more than 3-4), so you have time to get to critical trip logistics

3. Travel Parameters & Logistics (10 mins)

Now gather practical details — subtly and professionally.

- Budget range
- Preferred destinations (or openness to ideas)
- Dates or windows
- Special occasions (anniversaries, birthdays, proposals)
- Flight preferences (class, airline, layovers, total flight distance)

- Accommodation style (villa, resort, boutique, all-inclusive)
- Dining preferences (Michelin, local, wellness)
- Accessibility, health considerations, food allergies, dietary restrictions, and mobility issues
- Must-do activities and excursions

Tips and tricks

- **Ask about *non-negotiables***. This helps avoid future friction, and helps you to prioritize what is most important as you build out your clients' itineraries
- **Engage with your clients' answers.** This shouldn't feel like an interview. React to what your client is saying, and use it as a chance to further demonstrate your expertise (e.g., share your experience staying at a resort they mention or how much your clients loved a particular restaurant in the style they prefer)
- **Take notes.** Again, be sure to take detailed notes, so you can build the best proposal after the call

4. Set Expectations (5 mins)

Reassure them of the process, timing, what you will deliver, and when you will deliver it. This will vary based on your schedule, volume of business, and decision on whether or not to charge fees. It is important to be candid and up-front about what your clients can expect by when, and you should avoid overpromising. If you tell your clients they will hear from you in 3 business days, you need to hit that deadline to maintain trust in the relationship, so be cautious in what you guarantee during the consultation.

Example script (no fees):

"Based on what we discussed, I'll create a personalized proposal within 3–4 business days. It will include handpicked experiences and accommodations tailored to your style, with pricing included for your review. From there, we can refine together until it's perfect."

Example script (fees):

"I am so looking forward to partnering with you on this trip. For trips like this, I charge a planning fee of $X. After this call, I will send you a description of what is included in this fee, and if you would like to move forward, I will send you the invoice. Once the service fee is paid, I will create a personalized proposal within 3–4 business days. It will include handpicked experiences and accommodations tailored to your style, with pricing included for your review. From there, we can refine together until it's perfect."

Tips and tricks

- **Be clear**. Your clients should be alongside you every step of the way and know exactly what is coming next. Set expectations immediately, so they aren't confused if they do not hear from you immediately after the call
- **Do not overexplain your fees.** If you charge a service fee, do not feel the need to justify it on the call: you are a professional, and professionals charge professional fees. That being said, if your clients ask what is included in the fee, you should be prepared to explain your offering (and can look to our service offering templates for inspiration).

5. Close With Confidence (2–5 mins)

- Reaffirm enthusiasm: "I'm so excited to bring this vision to life for you."
- Ask if they have any additional questions
- Thank them again for the opportunity
- Send a summary emai*l* within 24 hours: thank them, recap goals, confirm timeline

The best consultative sellers…

- **Build emotional connections.** Use empathetic language: "That sounds amazing," "I love that vision," "Tell me more." Take notes during calls, including tone and keywords
- **Know their audiences.** High-end clients expect discretion, speed, clarity, curation, and exclusivity when planning travel. Your offering and tone should reflect those needs
- **Anticipate concerns and pre-empt objections.** Know your clients' pain points going into the call, so you can be prepared to resolve them with your exceptional service

If you have further questions or need further guidance on consultative selling, please reach out to Alexis (alexis@travelwithawestruck.com) for support.