High Touch

Agents use technology to create a personal touch with client

BY MIMI KMET

cover focus

masters of technology

Jason Holland integrates several online software tools with Mail Chimp.

I t's impossible to be a successful travel agent, especially if you're an independent contractor, without technology. In fact, technology helps you have a more personal touch with clients by enabling you to stay connected via better communications and mobility.

Technology also leads to greater creativity, according to Kat Perkins, who runs Choice Travel Adventures from her home in Anthem, Ariz., an affiliate of American Travel Bureau. "If you have a logo, keep it out there," she says. "Put it on your website and Facebook page." Technology enables you to post photos online, conduct polls and post specials. "Think outside the box and be a little crazy," she adds.

Many technological tools are available — too many to include in this article. So we have narrowed them into six categories. Here is a summary.

HARDWARE FOR AGENTS

Laptops, tablets, and smart phones are the main hardware tools for tech-savvy agents who are in constant touch with clients. Lorene Romero, owner of Sharp Tongued Consulting, a home-based Nexion agency in Windsor, Calif., keeps a MacBook with her at all times and no longer owns a desktop computer. "It keeps me available" to clients, says

Romero, NACTA's San Francisco Bay Area chapter director, who also has an iPhone and iPad.

It's important to know the difference in terms of what each device can do. A computer is more flexible because of its dedicated keyboard and larger storage capacity, according to Amber Blecker, a Denver-based CruiseOne affiliate. In addition, you can download photos and attach auxiliary devices.

But a tablet is handy when you leave the hotel room and don't need those functions, Perkins says. "You need a tablet for some things, because it has a larger screen than a smart phone," says Perkins, who is NACTA's Arizona chapter board member.

Still, it's smart to have your smart phone so that you can return a client's call or email as soon as possible. Blecker relies on her Blackberry for that reason. For example, she has been in Africa and used the unlimited international Blackberry email that her cell phone service carrier, T-Mobile, offers.

"I can be literally on safari in the middle of the Serengeti and be watching lions and at the same time responding to a client," she says.

Lorene Romero uses a MacBook, an iPhone and an iPad.

WEBSITE WITH BOOKING ENGIN

At home or on the road, you ne website that is user-friendly and booking engine. If you are affiliated a travel agency franchise, host ag or other agent organization, you have access to that organization's prietary booking engine. Michael (soli, an Atlanta-based franchise o for Cruise Planners/American Ex uses Cruise Planners' eREZ tool. completely mobile; I can book res tions from my iPhone and laptop says. "It makes payments and gene a confirmation email immediately.'

Toni Lanotte-Day, MCC home-based Nexion travel consu at Toni Tours Inc. in Levittown, has her own website that's linke Nexion and books all of her air Nexion through a program called "I don't have to have my own GDS tract," she says, adding that the bo engine also allows her to write i ticketing fees. She receives a mo report that shows all of her transac

SOCIAL MEDIA

Facebook, Twitter, Pinterest, you it. Social media is the latest and gr way to get the word out about your ness, travel products and deals. "Th is to get interaction," Perkins say posted an Oktoberfest recipe for be potato soup in October, with the ta "Got leftover beer from Oktoberfe:

Romero finds new clients v: cial media. For example, she found ent through a women's Facebook whom she booked on a cruise. the client returned, she posted she loves her travel agent and inc Romero's name. Romero also de YouTube postings consisting of shows of her own travels set to m

If you don't know how to u cial media for marketing your bu several suppliers, like Celebrity C provide free webinars and oth structional tools, Perkins says. Hu and other sites also provide traini

To consolidate all your page different social networking sites, Holland, CTA, who runs Travel
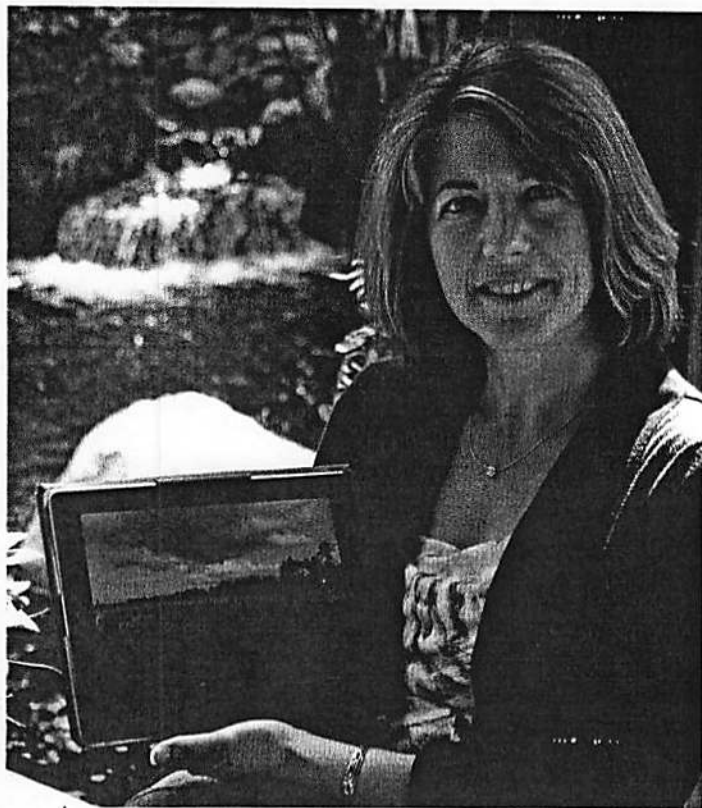
Lynn Rudin plays "Words with Friends," an app-based version of "Scrabble," with her traveling clients.

plicity from his home in Etters, Pa. —and subscribes to Pinterest, Twitter, Facebook and Foursquare—uses Hoot-Suite. If you post a message on one site, HootSuite sends that message to all of your social media accounts, he explains.

TRAVEL-RELATED APPS

Here are a few of the myriad travel-related apps. Holland uses FlightTrack, which tracks flights and provides updates on his and his clients' flights. Another app, Airport Ace, provides information about airports worldwide, including IATA codes, contact numbers, dining options, weather and taxi information. "You don't have to log into every airline's website for the information," Holland says.

Lynn Rudin, a Westlake Village, Calif.-based independent Nexion agent, uses the U.S. State Department's Smart Traveler app for travel warnings and other information, as well as a currency exchange app. And she stays in touch with traveling clients by playing "Words with Friends," an app-based version of the board game "Scrabble." "It really helps to build that relationship," she says.

OTHER SOFTWARE TOOLS

Like apps, many software tools can help you succeed. Some are free for basic service, with fee-based upgrades. Others charge a monthly rate. Here are examples:

Robert Jensen, vice president of operations and co-owner of Randell's Travel, a home-based agency based in Sarasota, Fla., affiliated with Vacation.com, advocates having a synchronization service like Wuala, which also provides secure Cloud storage. "It keeps documents synced between different computers and different storage avenues, so, if I'm working on a document, Randell [Johnson, co-owner and NACTA's Tampa co-director] can access it with my changes, and each person has the latest copy of it."

Randell's Travel also recently began using a messaging service that sends a text message telling its agents that they've received a voicemail or email. "If we're overseas or on a cruise ship where we don't want to use our mobile phones and a data plan, the service will alert us via a text message," Jensen says. They can then go to a computer with WiFi and see the email. Voicemails are attached as audio files.

To access WiFi wherever he goes, Consoli rents MiFi from XCom Global. While it won't work when you're at sea, "I can use it in any port without having to find an Internet café," he says.

Holland uses Mail Chimp, which is similar to Constant Contact. It allows you to write an e-newsletter and send it out to a list of clients and keep in touch with them. He uses it to send out an e-newsletter called Inspirations.

Toni Lanotte-Day's website is linked to Nexion's, where she books air.

You can integrate other programs into Mail Chimp. For example, Holland integrates Survey Monkey to create a survey that is sent to clients. And with Event Brite, you can create a group trip around an event and sell tickets and include a price. It emails tickets to people who can call them up on smart phones or print them out.

Voice Over Internet Protocol (VoIP), which links your phone and other voice messaging services with your computer via the Internet, allows you to transfer phone calls to wherever you are. "No matter where we are, we can pick up the telephone, so we're really never out of touch," Jensen says.

Romero gained a client when she communicated with her via Skype. "I held up my cat, so she could see that I wasn't in a cubicle in another country," Romero says. "We really bonded, and it wouldn't have happened if we didn't have the media."

BACK-OFFICE SYSTEMS

Every agent needs a good database program, Lanotte-Day says. She uses Sabre's ClientBase, which helps her with target marketing. She sends out a survey so clients can update their travel preferences quarterly, and the codes are updated automatically. That allows for targeted promotions. In addition, she can update codes and see how many clicks she had from a client.

If you have a Mac that doesn't work well with ClientBase, there are other programs, says Romero. She uses Mac Mail to write her notes on clients as well as Evernote, which works on any browser. "I put my client information into a folder, and it's there all the time, no matter where I am," she says.

Consoli uses My Trips, a Cruise Planners product, which allows his clients to update their profiles, as well as purchase shore excursions and perform other functions.

Lanotte-Day files everything in the Cloud. She has an iGoogle account, from where she can access her Google calendar, Gmail and a to-do list program called Remember the Milk. All of her emails are automatically forwarded into her Gmail account. "No matter where I am in the world, no matter what time of day, as long as I have a 3G signal, I can pull up my files," she says. @