

SOP Template: Personalized Itinerary Planning and Reservations Management

This SOP details the process of **personalized itinerary planning and reservations management**, encompassing client consultation, itinerary customization based on preferences, booking accommodations, transportation, and activities, managing confirmations and modifications, ensuring seamless communication with service providers, and maintaining accurate records. The objective is to deliver tailored travel experiences with efficient reservation handling to maximize client satisfaction and operational efficiency.

1. Purpose

To establish standardized procedures for delivering customized travel itineraries and efficiently managing all related bookings and reservations.

2. Scope

This SOP applies to all staff responsible for itinerary planning and reservation management within the travel agency or tour operations organization.

3. Responsibilities

- **Travel Consultant:** Engage with clients, design personalized itineraries, and process reservations.
- **Reservations Coordinator:** Confirm all bookings, handle changes/cancellations, and maintain updated records.
- **Operations Manager:** Supervise process adherence and address escalated issues.

4. Procedure

1. Client Consultation

- Receive inquiry and schedule consultation (in-person, phone, or virtual).
- Gather comprehensive information:
 - Travel dates and budget
 - Preferred destinations and experiences
 - Accommodation, transportation & dietary preferences
 - Special requests (accessibility, celebrations, etc.)
 - Traveler details (number, age, etc.)
- Summarize and confirm requirements with client.

2. Itinerary Customization

- Research suitable options leveraging trusted suppliers and partners.
- Curate a day-by-day itinerary aligned with client preferences.
- Provide draft itinerary for client review and feedback.
- Revise as needed until client approval is obtained.

3. Reservations Management

- Book accommodations, transportation, and activities as per approved itinerary.
- Secure confirmations and payment details with each provider.
- If required, place holds to reserve critical components.
- Document all reservation numbers and terms.

4. Confirmation and Communication

- Compile confirmed itinerary and dispatch to client for final review.
- Send detailed confirmations to all service providers.
- Maintain open channel for questions and modifications from client or providers.

5. Modifications and Issue Management

- Process client-initiated changes or cancellations as per provider terms.
- Communicate all updates to affected service providers.
- Handle conflicts/escalations promptly and professionally.

6. Recordkeeping

- Maintain comprehensive records for each client:
 - Consultation notes and correspondence
 - Final itinerary and all confirmations
 - Invoices, payment receipts, and modifications
- Ensure data is stored securely and accessible to authorized personnel.

5. Documentation & Templates

Document/Template	Description	Location
Client Consultation Form	Collects initial preferences and details	CRM System / Shared Drive
Itinerary Proposal Template	Standardized structure for presenting travel plans	Templates Folder
Reservation Log	Keeps track of all booking references and status	Booking Management System
Confirmation Email Template	Ensures consistent communication with clients/providers	Email System Templates

6. Review & Continuous Improvement

- Solicit client feedback post-travel for service enhancements.
- Regularly update supplier database and reservation protocols.
- Conduct periodic SOP reviews for process optimization.

7. References

- Company Travel Operations Manual
- Data Protection & Privacy Policy