

# CLIENT FOLLOW-UP CHECKLIST

## PERSONAL TRAVEL

ADVENTURER'S NAME:

ID:

DESTINATION:

TRAVEL DATES:

CONFIRMATION NUMBERS:

- ☐ SEND "WELCOME BACK" CARD AFTER DEPARTURE
- ☐ SEND CLIENT INVITATION TO REVIEW EMAIL
- ☐ PUT ON NON-SPECIFIC EMAIL LIST (OR SPECIFIC IF FUTURE TRAVEL IS KNOWN)
- ☐ SEND BIRTHDAY CARDS: BIRTHDAYS:

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- ☐ SEND ANNIVERSARY CARDS: ANNIVERSARY: \_\_\_\_\_
- ☐ SEND CHRISTMAS CARD
- ☐ SEND INVITATION TO CLIENT APPRECIATION PARTY
- ☐ SEND INVITATION TO EVENTS
- ☐ DOES CLIENT LIKE US ON FACEBOOK? IF SO, SEND BIRTHDAY WISHES ON FACEBOOK AS WELL
- ☐ ON YEAR ANNIVERSARY OF DATE OF FIRST CONTACT, SEE IF CLIENT WOULD LIKE TO MEET TO PLAN NEXT VACATION . DATE: \_\_\_\_\_

**WRITE ALL DATES IN AGENDA AND HAVE  
FOLLOW UP CARD MADE!!!**

**THIS FORM THIRD ON RIGHT SIDE COVER OF CLIENTS FILE**