



Case Studies

Travel Advisors

Tammy Murphy / VIP Travel Experience

Shylar Bredewold / Odyssean Travel

Lene Minyard / Perfectly Planned Journeys

Consistent and connected.

"I think the visual presentation increases the sale."

- Tammy Murphy, Luxury Travel Advisor



"I have been with travefy for five years and am so thankful. I love everything about Travefy." Tammy Murphy of VIP Travel Experience notes of her long track record with Travefy's award-winning itinerary and proposal platform. For luxury travel advisors like Tammy, presentation and a consistent experience for clients is extraordinarily important. From the inquiry, to the proposal, through the booking and final document process, every step of the way should be refined and polished.

For Tammy, Travefy is used throughout her entire process while working with clients to craft their travel experience. "I use Travefy as a sales tool and show it on my TV during client presentations—it helps show client experiences and the pictures help them feel as if they are there. I do think the visual presentation increases the sale." In working with thousands of travel advisors worldwide, the common denominator of using Travefy successfully is when the advisor leverages Travefy from quoting all the way through final documents. The time savings achieved from the streamlined workflow and simplicity of having everything in one system is usually noted as one of the greatest benefits in using Travefy. Tammy adds, "It saves me time because the proposal is expanded and becomes the final documents."

When catering to the luxury market, presentation is key, yet creating a personal connection with clients is what creates loyalty for years to come. Advisors use Travefy to stay connected with clients during their trip and create a

more personalized experience by leveraging the client-facing Trip Plans app for real-time flight updates and client chat messaging.

"I do love the option of updating the trip plan and while clients are abroad they can open app and see the changes in their trip plan. I love in this period of time—it instantly shows me when flights are cancelled and to follow up on them." With the Trip Plans app the advisor can make updates to the client's itinerary in real-time and notify them via chat messaging. Additionally, when the client has questions the advisor is just a chat message or phone call away. Tammy adds "I like my photo and phone number are right at the top of the app so it's easy for the client to contact me."

Ultimately, Travefy is a tool, a solution that when used by skilled travel advisors becomes the canvas that they can craft stunning and life-long travel experiences on. And when clients find something they love, they want to share it with others—the best way to market your travel business. Tammy notes how she receives word of mouth marketing with her clients, "I love the professional look, the app for my clients. I love that it looks so custom & personalized to my clients. My clients love this and show off their trips in the app to others."

If you are interested in learning more about how Travefy can increase the professional, consistent experience within your travel business, reach out to us at professional@travefy.com.

An on-brand touch.

“My close rate increased incrementally and the time saved permits more time to market and engage elsewhere.”

- Shylar Bredewold, Owner - Odyssean Travel



Travel agents are some of the busiest people in the industry. They work on operating their own small business as well as engage directly with clients on a very complex timeline. Travefy is working to support agents throughout those processes and save time for our users where we can. But you don't have to take our word for it. Shylar Bredewold from Odyssean Travel has been working with Travefy for several years now, and he was kind enough to provide us some insight to his use and the benefits that he's been experiencing.

“Travefy helped me present things clearly and effectively, my clients loved how easy it became to review their trip plans. Not only that, it was saving me some serious time.” This summarizing statement from Shy fully encompasses what Travefy is accomplishing with our app. His previous workflow included what a lot of travel agents are still currently doing. “I found myself wasting a lot of time fiddling with PowerPoint or cutting & pasting various supplier PDFs,” says Shy. This an age old story that we hear all the time, and one of the biggest pain points for agents in their process.

But how does an agent like Shy save time using Travefy? Time-savings is baked in large ways and also in less obvious ways. “I've tried a number of itinerary builder programs and I have to say that one of my favorite yet seemingly insignificant aspects is the auto-populate of an overnight when inserting lodging. I select accommodation and pick a date of 'check in', then a prompt appears to input a date of 'check out'. It's a small step, but when putting together a custom FIT it saves an awful lot of time. Surprisingly, one of the competing tools I had tried, although comprehensive, required I input a check in event and a check out event separately.” Shy also notes the significant time-savings importing multimedia to events or conveniently adding in full events directly from the Library. Not only do these

tools add an “on-brand touch into my client itineraries,” agents like Shy don't have to spend a large amount of time accomplishing it.

Going hand in hand with time savings is creating a professional look. Shy noted, “I wasn't having much luck presenting itineraries in a professional manner, [and] those itineraries were not consistent in that the formatting would be different each time I shared a new one.” Now, instead of choosing between time-savings or a professional look—Shy can achieve both. This professionalism that Travefy offers is also encompassed by aspects like auto-updating flight information, so agents don't have to keep track of sudden changes in flights. This aspect isn't lost on Shy. “Almost every client trip which involves airfare benefits from the auto-update feature, I know it brings peace of mind to many of my clients. For those who have experienced a schedule change or delay, the feature has helped them stress less or plan better,” he states.

Time-savings and professional products are great benefits to the agent and the traveler, but really what we're after is increased sales for the agents and being able to use that saved time to find new sales. “My close rate increased incrementally and the time saved in presenting and sharing certainly permits more time to market and engage elsewhere,” Shy continues.

Travel agents have a lot on their plates, and if Travefy can step in and take something off their plates, we do! Thank you to Shy for putting together these great responses and for all the help on this case study. Check out him and Odyssean Travel! If you have any interest in learning more about saving time, producing professional documents for your clients, or to just sell more, reach out to professional@travefy.com.



A fraction of the time.

"I can do an itinerary in about 15 minutes"

- Lene Minyard, Owner - Perfectly Planned Journeys



Imagine trying to corral and then coordinate a trip for a bunch of high school graduates or maybe young college students traveling for their first time alone. There's a lot to take care of in these situations, and these are just a couple of the scenarios that Lene Minyard has been able to handle effectively with Travefy. Although your specialties and client demographics might differ, having a handle on the itinerary and proposal process with any of your clients is a huge benefit to you and your business.

Back to the above story. Lene had this to say about succeeding with these trips. "I have noticed that especially when I have had HS graduates going on a graduation trip, or young college kids traveling alone, parents love having access to their travel plan, and receive updates when for instance flights are changed. I had two boys who went to Europe on a graduation trip by themselves, who had flights delayed for several hours. The parents were very thankful that they were kept informed on their flights at all times." This was achieved with the Trip Plans app, a mobile app focused on providing the trip details in the itinerary to clients while they're traveling. Available both offline and online, the details are handy on the devices people are using more and more while traveling.

Just like Lene, the Trip Plans app as well as the other features of Travefy itineraries and proposals are great selling points in your offerings as a travel agent. "When I promote my services to my clients, Travefy itineraries are one of my selling points. They like the fact that they can keep all their information on their phone, and share it with

family and friends." Not only are the proposals and itineraries sharable amongst everyone going on the trip, the Trip Plans app has a group messaging function to use while on the trip, even to connect the travel agent with the travelers!

"Prior to using Travefy, I did my proposals and itineraries in my word processing program. Since I believe consistency is important when building a brand, I would often spend several hours on the itineraries to make them look good." Lene is not alone in this; many agents across the travel industry are using this same exact method, trying to achieve results that could take many hours, even days. With tools like Library and numerous supplier integrations, Travefy easily merges with your current process and provides that same consistent brand feel in a fraction of the time." I spend about an hour [in Travefy] if the itinerary is detailed and has a lot of components. If it is a destination I have used before, I often have the information I need in my library, which makes it a breeze to import to new itineraries, and I can do an itinerary in about 15 minutes."

While connecting with your clients throughout the sales or the travel process, a consistent and professional presentation is of the utmost importance. Travefy provides a solution that allows travel agents to build these itineraries and proposals in a shorter amount of time, all while achieving these very important objectives. If you have any interest in learning more about saving time, producing professional documents for your clients, or to just sell more, reach out to professional@travefy.com.