



Case Studies

Travel Advisors

Nicole Sicard / Paradise Haven Travels

Jennifer Jacob / Explorateur Travel

Cher Bell / Ebony Vacations

Tammy Murphy / VIP Travel Experience

Shylar Bredewold / Odyssean Travel

Lene Minyard / Perfectly Planned Journeys

Perfect for the Perfectionist

"Travefy added another level of credibility and professionalism."

- Cher Bell, Owner - Ebony Vacations



For many agents in the Travel industry it is their own personal love of travel that serves as inspiration and is what often leads them into their profession. Cher Bell is no exception to this. She reminisces that "I believe my wanderlust began at a very young age as a military brat traveling the world with my family. I quelled my thirst for travel and experiencing amazing adventures by creating customized itineraries for my family and friends." This personal passion for travel can naturally translate into a strong prioritization for providing a memorable and organized experience for clients.

For Cher, taking pride in delivering customized and detailed itineraries to her clients is how she continues to present her passion for travel in her business. Previously, taking the time to craft a personalized experience could be a tedious and time consuming process. "I am obsessively detail oriented and it used to take me six to ten hours to prepare a quote and much, much longer to create a trip itinerary. And then came Travefy! I can typically complete an attractive and organized quote or itinerary in under an hour".

The phrase goes that the "devil is in the details", but it can also be in the lack of details - especially when it comes to creating a travel itinerary. As an agent that prides herself on perfection, attention to detail was an element of service that Cher was able to heighten with the use of Travefy. "I can pull in information, images, websites, etc. from many destinations all over the world! The contact info is clear, we are able to add links to our website and the reservation page, and we are able to make modifications and corrections quickly and easily".

Not only was Cher able to create individualized and ideal itineraries, but she was also able to save time while

creating them. With this saved time, Cher was able to invest more hours into strengthening other important aspects of her business. "The hours upon hours that were invested in creating quotes and itineraries are now invested in revenue producing activities, marketing, client support, sales, etc.

With the ability to quickly create and share through Travefy, Cher reflects that it has even allowed her to have a competitive advantage. "The easy to use Travefy platform allows a quick turnaround where we can provide a complete, professional, and informative quote to clients in a very short period of time. Travel can be, for the most part, an emotional purchase. Getting quote info to clients quickly allows us to "strike while the iron is hot." Although efficient time management, providing aesthetically pleasing and detailed itineraries are crucial qualities in managing any travel agency, Cher notes that perhaps the most important aspect of using Travefy is the recognition and satisfaction that she has received from her clients. "Clients have commented that they were impressed with the presentation of Travefy and that it added another level of credibility and professionalism. It has set my agency head and shoulders above the others".

Whether it be through the professional presentation, the time efficiency or the ability for agents to create their perfect itinerary, Travefy provides satisfaction not just for their agents but also for their travelers around the world. 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.

Creates a Customized Experience

"Travefy is a game changer in presentation."

- Jennifer Jacob, Owner - Explorateur Travel



Jennifer Jacobs of Explorateur, began the journey of using Travefy around the same time that she began to build her business. "I actually started my business solely as an itinerary creation company, so it hinged on a good system. In fact, I used Travefy to start my company and never knew any different." Jennifer founded her company Explorateur out of a need that she saw within the travel industry. "Travel had shifted from being about seeing to being more about feeling. So it was our goal to infuse each trip with culture and local flair, while considering the style and budget of each traveler."

With Travefy's platform, Jennifer was able to avoid the dry and dull PDF itineraries of the past and instead present her clients with aesthetically pleasing presentations of their upcoming trips.

"Travefy is a game changer in presentation. While many vendors provide pdf documents that can be "wordy" and hard to digest, Travefy provides an aesthetically engaging platform for proposals and itineraries".

Additionally, Jennifer has been able to present her crafted travel itineraries to her clients on more than just a simple print-out, paper PDF. With Travefy's convenient mobile device applications, Jennifer's clients are able to view their travel plans all on their mobile devices. "As technology increases, the ability for clients to reduce paper and utilize a personalized app has become increasingly valuable". Jennifer shared.

Having the ability to conveniently pull up itineraries via mobile phone, has even led new clients to Jennifer and her business. "I have had clients who came from strangers showing them their app on the phone. The ability to hold your full itinerary within one device is a major selling point. Not only has the client facing app allowed me to differentiate my business, but it has been a key player in client retention".

For Jennifer, her company does more than just present an itinerary to their clients, but rather it is her goal to present the promise of a cultural experience, an invitation to adventure. With her use of Travefy she has been able to achieve this expectation. She shares that "Travefy does more than simply lay out an itinerary, but it also allows designers to properly paint a picture of what the client will experience. I believe that providing additional details in this platform surprises and delights the eye, and immediately allows a potential client to become excited about their potential trip."

Travefy strives to provide a service that sets its users apart from their competition. With its simplistic process where eye-catching itineraries and quotes can be created effortlessly, Travefy promises that it will be a gamechanger for you and your business. If you have any interest in learning more about Travefy, its features and how to add this dynamic tool to your business reach out to professional@travefy.com.

Communication is Key

"It closes the sale faster."

- Nicole Sicard, Owner - Paradise Haven Travels



As many Travel Agents can attest to, communication is a critical component to being able to understand your clients, their wants and needs, be able to build their ideal itinerary and assist them throughout the duration of their trip while it is in action. How an agent is able to communicate with care and consideration can make the difference between a one time customer or a lifelong client.

Nicole Sicard of Paradise Haven Travels offers her travellers the best customer care possible by prioritizing this basic but always dynamic element of communication. Since 2014, it has been her company's goal to provide their clients with "the most authentic experiences that help them make meaningful connections with the destinations that they visit".

Prior to her experience with using Travefy, Nicole shared that it could be a challenge to stay organized and connected with her travellers. "Travefy helped me solve this problem by creating a platform that allowed me to integrate all of my FIT reservations, sometimes even automatically, into one document. Which allows my clients to have a beautiful visual itinerary with all their attachments in one place"

In addition to being able to share her vision for her client's trips through clear and organized itineraries, Nicole was also able to stay connected in a savvy

and convenient way. "Through the Travefy Mobile apps it allows my clients to have a way where they can communicate with each other to keep organized and/or with me for updates or emergencies".

Nicole shared an instance where having the ability to communicate through her Travefy mobile app with her travellers, made the difference between a crisis being averted and a situation of being stranded. "One of my clients had a transportation emergency on her return from a Barcelona cruise. When she and her family disembarked from the ship her private transfer to the airport never showed up. Due to the time difference in Spain and phone costs it would have been challenging and costly to reach me. However, since she had the Travefy app, she was able to message me on the app. I received the message and was able to arrange another transportation for them and get them to their flight back to the US on time".

Though impossible to predict what bumps in the road a traveller may hit, having the right tools to support and communicate with your clients will allow for smooth sailing and ensure that their experience is an excellent one.

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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."

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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.

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 is 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.