

THE DESIGN AND DEVELOPMENT
OF CREATIVE VACATIONS
SALES MANAGER REFERENCE MANUAL

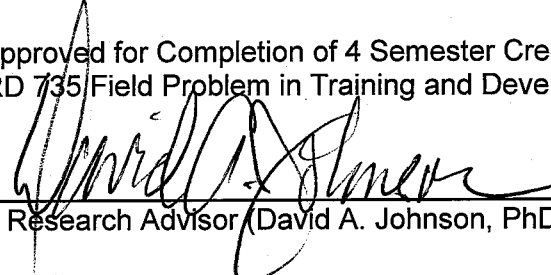
by

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ABSTRACT

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The Design & Development of Creative Vacations Sales Manager Reference Manual

<u>Training & Development</u>	<u>David A. Johnson, PhD</u>	<u>December/2003</u>	<u>34 pages</u>
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(Name of Style Manual Used in this Study)

The purpose of this field research problem was to design and develop a Sales Manager Reference Manual for Creative Vacations. Creative Vacations is a tour operator that creates escorted vacations for mature adults in the United States.

Tour operators that sell vacations to the mature adult market are extremely competitive because they are selling similar products to the same age group of adults (45 and over). Since September 11, 2001, along with the war in Iraq, and the state of the economy, selling vacation tours has become challenging. All tour operators are striving to develop a better product, create value in the product, and have a marketing niche for their vacation products.

The Three major objectives of this study were to:

1. Determine if a Sales Manager Reference Manual was needed for the sales department at Creative Vacations.
2. Determine if competitor tour operators have a Sales Manager Reference Manual.

3. Design and develop the Sales Manager Reference Manual.

The reference manual was designed to assist the Sales Manager with the daily operations of a sales department, as well as assist others in the company that work in a sales capacity. Currently, there are no reference manuals available on-site at Creative Vacations.

Because of the competitive nature of the tour operator industry, none of the competitors provided information on whether or not a company reference manual was utilized. The skills that the competitors look for are important because it creates quality within the company. It also forces Creative Vacations to develop competent and profitable sales employees; therefore, a Sales Manager Reference Manual will be beneficial to Creative Vacations.

References were located from various sales periodicals and sales management books. The resources were combined to develop an outline for the creation of a Sales Manager Reference Manual. The references were used to develop a Sales Manager Reference Manual for Creative Vacations. The manual is a self-directed resource tool. After designing and developing the manual, nine creative recommendations for using it at Creative Vacations were developed.

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My husband, John, for encouraging me to continue when at times I felt frustrated while working full-time and taking classes on the weekends. My co-worker, Judy for helping me proof my paper and Dr. Johnson, my research advisor, for his support and patience over the last year.

Chapter 1

Introduction

Organizational Overview

Creative Vacations is a tour operator facility. The company has been in operation for 31 years. The customer profile for purchasing Creative Vacations tours are mature adults ranging in ages from 45-85 with time and money to travel. There are 45 employees located in the corporate headquarters in Eau Claire, Wisconsin. The managerial style is traditional. There are 60 professional tour managers that escort the tours. Creative Vacations operates 60 tour itineraries that travel to Australia, New Zealand, Asia, Europe, United States and Canada. The company takes approximately 10,000 customers on vacation each year.

The mission statement at Creative Vacations reads, "To enrich our customers' lives with valued travel experiences." The values include hiring the best tour managers in the industry, providing excellent customer service to the guests, and providing deluxe, escorted vacations.

Statement of the Problem

The TV/radio Sales Department generates 80 percent of company revenue. The department consists of three representatives plus the Sales Manager. The President of the Company also sells.

Currently, there are no on-site sales resource materials available for the Sales Manager. The field research problem was to develop a Sales Manager Reference Manual for the Sales Manager to use in the day-to-day activities of the sales department. In order for Creative Vacations to meet the business goals of the company, it needs to continue to increase profits. The number one priority for the Sales Manager is to train current and new sales representatives and to increase revenue.

Research Objectives

The three objectives for this research were to:

1. Determine if a Sales Manager Reference Manual was needed for the TV/radio sales department.
2. Determine if competitor tour operators have a Sales Manager Reference Manual.
3. Design and develop the Sales Manager Reference Manual.

Assumptions of the Study

There is no formal training plan in place to train the sales representatives. In the past, sales representatives have been provided with six months of on the job training but no additional sales skills training. In order for Creative Vacations to stay competitive, they need to increase sales by training sales representatives on basic sales skills. The Sales Manager's goal is to train current and new sales representatives to improve their skills to increase profits every year.

The travel industry has been hit hard with the terrorist act of September 11, 2001, the SARS virus, and Operation Freedom in Iraq. The world current events make it hard to keep customers and obtain new customers. Several companies have been forced to go out of business because of the economy, terrorism, and world illnesses that make Americans fearful of traveling around the United States and the world. A productive, well-trained sales team needs to be proactive and ready to face the challenges the industry is facing today. Revenue development requires sales representatives to obtain more accounts each year because old accounts will not generate the same amount of revenue each year. A reference manual will allow the sales representatives to improve their basic sales skills and increase profits.

Limitations of the Study

There are two limitations to this study:

1. A small sample size of the population of sales representatives. The sales staff includes three sales representatives and the Sales Manager.
2. This research project will only be applicable to Creative Vacations, and probably cannot be generalized for other tour operators located throughout the United States.

Definition of Terms

The following terms are used throughout the report. They are defined by Creative Vacations.

1. **Baby Boomers.** Adults ranging in age 45-55 years who purchase vacations.
2. **Mature Adults.** Adults ranging in age 55 years and higher who purchase vacations.
3. **Sales Manager Reference Manual.** A document that provides research articles relating to selling.
4. **Tour Sales Consultants.** The employees, who answer the 1-800 telephone calls, take reservations, send out literature, and sell tours over the telephone to customers that inquire.
5. **TV/Radio Sales Department:** The department that sells our tours directly to media accounts all over the United States.

Summary

A Sales Manager Reference Manual will help to meet the overall business strategy of the company, which is to increase profits. Sales are the most important area of the company. It is important that the Sales Manager has the appropriate resources

available on site to run the day-to-day activities within the sales department. The Sales Manager Reference Manual will also benefit other employees who sell tours to the customers and other employees that act in a sales capacity by providing standardized information in a single document.

Chapter II

Review of Literature

Introduction

The following review of literature is to assist in the development of a Sales Manager Reference Manual at Creative Vacations. The vision of the company is to provide mature adults with high quality escorted tours that are carefree, fun, and affordable. When we discuss mature adults, their ages can vary but the majority are baby boomers or mature adults. According to Travel Weekly, the Travel Industry Association Study (2003, ¶1-3), "Baby Boomers travel more than any other demographic group, according to a study by the Travel Industry Association. Baby Boomers, those ages 35-54, last year took 43 percent of all trips...by comparison, mature travelers (age 55 and older) took 31 percent of trips." The company hopes to increase the customer base every year by increasing sales revenue from customers in the baby boomer (35-54 age group) and mature adult market (55 and older).

According to the American Heritage Dictionary web site, the word reference manual was found as two separate words. The word reference means "an act of referring, significance in a specified context, meaning or denotation, the state of being related or referred, a note in a publication referring that reader to another passage or source." The word manual means, "a small reference book, especially one giving instructions."

Companies throughout the world utilize reference manuals for their employees. Some reference manuals provide how-to instructions, informative articles, company definitions, and product lists. After searching under sales reference manuals, one corporate reference manual example appeared that would be similar to the Creative Vacations reference manual. L. Zumstein & Company (2003) provides staffing industry training and consulting services. According to their web site, the reference manual was

described as the “.... Bible of any staffing services field representative regardless of experience level. Readers will have a handy how-to guide for creating valid business opportunities.” The L. Zumstein reference manual included seven sections as follows: (a) consultative selling, (b) know your market, (c) know your customer, (d) know your contact, (e) know your services, (f) know how to handle concerns, and (g) putting it all together.

There were multiple examples of reference manual formats, but only three had significance. The first example was from an academic setting. San Jose State University described their career planning reference manual as follows: “The online career planning reference manual of San Jose University (which) gives students an overview of the school’s career placement services and scheduled events and provides informative articles on various aspects of the job search.”

The second example was from the Meyer Corporation, which makes gourmet cookware. They defined their company reference manual as a breakdown of their company, definitions of their cookware brands and information about their factory and store listings.

The third example was from the International Business Training Company. International Business Training (2003) Export Sales and Marketing Reference Manual was defined as: “a comprehensive guide for marketing and selling your company’s products internationally.” The reference manual provided an outline of information relating to exporting products. For example, the first page of the document was an outline with the titles of preparing to export, advantages to exporting, and evaluating your export readiness.

All three manuals provided items that were included in the Creative Vacations Sales Manager Reference Manual. The items are informative articles, a guide to selling your product, and definitions of company brands.

A company reference manual is a document that provides reference to a particular subject. A reference manual includes an outline, definitions, and informative articles for self-directed study. It can also provide information on how-to instructions.

Creative Vacations has a need for a Sales Manager Reference Manual which provides a skill enhancement plan to increase profits and to develop more effective sales skills. The sales department has a direct impact on the future of Creative Vacations because it generates revenue for the company to survive. The Creative Vacations Sales Manager's Reference Manual is a self-directed reference manual providing an outline, informative sales articles and tools that can be used to assist the department in understanding sales techniques.

The second objective of this research project is to determine if other tour operators have reference manuals and how they utilize them. Because of the competitive nature of this industry, tour operators are not willing to share company resources with strangers. Therefore, it is difficult to find out if tour operators use reference manuals and to find examples of other tour operator sales manuals.

A tour operator from New Zealand was interviewed. ID Tours in New Zealand is the tour operator for Creative Vacations New Zealand. (E.g., in a personal interview, November 23, 2003), Dianne Chester, Groups Manager stated: "Our company provides on the job training for new employees that start in a sales position. We are not fortunate enough to have access to a sales reference manual that relates to tourism and sales and marketing our product."

Industry Trends

The September 11, 2001 aftermath, the war in Iraq, and other factors have affected tourism overall. The world aftermath has created widespread fear that leisure travelers feel will make them stay home and wait to go on vacations. According to Mohl (2002), "tour operators who cater to seniors say their business has exploded in the last

month because their customers have the time, the money, and most important, the mindset not to let terrorist deter them from traveling" (p. A1). This is a very positive statement for the travel industry today that caters to mature adults. It is also said that mature adults have seen much worse than September 11. These individuals have lived through World War II and the Cold War. Mohl also stated, "As long as there are no specific warnings about traveling to where they're going, they're going to go" (p. A1). The Travel Business Status Survey (2003, ¶4-6) indicated that the following trends still apply to travel: "visitors are more often traveling to destinations closer to home, travelers are booking at the last minute (within two weeks of a trip), visitors are requesting information online, and booking online."

The leisure travel market is finding three key factors in the travel industry today: the war in Iraq, the economy, and on-line commerce. The war in Iraq is playing a deciding role for younger travelers. They are postponing or canceling trips. They have a reluctance to travel longer distances and make more last minute decisions. The economy is creating an atmosphere where value is critical to buyers. The new consumer and power of the online world is driving younger travelers to book on-line (National Tour Association Spring Meet Report, 2003).

The new trend in travel is Geotourism and learning about history and culture. The term Geotourism implies that U.S. travelers will pay more money to travel with companies that protect and preserve the environment. According to the Travel Industry Association, Tuesday Newsletter (2003, ¶4) "62 % say it's important to learn about other cultures when they travel. Furthermore, 38 % of travelers say they would pay more to use a travel company that strives to protect and preserve the environment."

A new study from the Travel Industry Association of America (TIA) and Smithsonian Magazine shows continued and growing interest in travelers' desire to experience cultural, arts, historic and heritage activities. According to the TIA and

Smithsonian Magazine study (2003, ¶9), the top ten cities visited by historical and cultural travelers are: Washington, D.C.; New York, NY; Chicago, IL; Boston, MA; Las Vegas, NV; Norfolk, VA; Atlanta, GA; Orlando, FL; San Francisco, CA; and Los Angeles, CA.

Travel weekly editors selected eleven top places on the rise that are gaining ground among U.S. visitors. They believe these will be popular destinations to travel to in the future. The top eleven up-and-coming travel destinations worldwide are: Krakow, Poland; Queenstown, New Zealand; Belfast, Ireland; Dubai, Arab Emirates; Salvador da Bahia, Brazil; Molokai, Hawaii; Tunica, Mississippi; Luang Prabang, Laos; Botswana, Africa; Belize City, Belize, and Havana, Cuba. Most surprising is Havana, Cuba since it is still illegal for Americans to enter the country (Travel Weekly, February 12, 2003).

Competitor Information

According to the U.S. National Tour Operators Association (2003), there are 300 tour operators in the United States. Three competitive travel companies that are similar to Creative Vacations were reviewed: Tauck World Discovery, Collette Vacations, and Prism. These competitors were chosen because they are similar in size, mission, and sell the same types of products. The three competitors also sell to the same target market customers, who are mature adults with time and money to travel. The competitor information is important to Creative Vacations because it tells the company what others are doing, how they are doing it, and if they are doing it well.

Tauck World Discovery.

Tauck World Discovery is located in Norwalk, Connecticut. It has been in business for 75 years and offers over 100 destinations. The company sells to baby boomers and mature adults. The Tauck World Discovery web site (2003) states that their mission statement is, "to offer enriching travel experiences that enhance people's lives by broadening their knowledge and fulfilling their dreams. To that end, we strive to

create unique and imaginative travel itineraries.” The company focuses on being the best tour operator in the world and they communicate this on every piece of material that they print including all catalogs, the web site, and company job descriptions. The company is consistent with telling all consumers that they believe that they are the best tour operator in the world. This is a great marketing tool because consumers are reading literature and brochures to decide if they would like to travel with the company or not. Tauck emphasizes the following five factors in their marketing:

1. They provide carefully designed and choreographed itineraries with a refreshing mix of sightseeing, leisure, adventure, and culture.
2. When you travel with Tauck, you enjoy some of the best hotel rooms at the world's finest hotels. With Tauck, you may stay in oceanfront rooms at the Royal Hawaii Hotel. Many of the hotels are rated as the worlds finest.
3. Tauck offers and selects restaurants that offer a true taste of each region you visit. They provide their guests' the opportunity to dine anytime and with anyone.
4. A Tour Director is along with the tour providing information about the destination, its history, and the culture.
5. You save up to 40 % from the cost of traveling on the same itinerary on your own. Virtually all travel expenses are included. Tauck tours offer you both superb quality and extraordinary value. Item number five is extremely important because it tells the potential customer exactly how much can be saved by traveling on a group tour. Savings and value are qualities that are very important to mature adult travelers.

Tauck expects employees to have the following skills when employed in a sales capacity:

1. Utilize creativity to help Tauck be the best travel company in the world.

2. Implement marketing strategies to meet consumer needs and competitive conditions in the market.
3. Utilize communications skills to sell products and services.
4. Nurture and strengthen the Tauck World Discovery brand by making sure the image is portrayed to all types of audiences.
5. Meet all sales goals while meeting or exceeding our guests' expectations.
6. Ensure that Tauck's high level of customer service is met by working as a team to ensure cooperation on customer issues.
7. Ensure customer satisfaction is met on a consistent basis.

Tauck's main focus in 2003 was global alliances. According to Cogswell (2003, ¶1), "Tauck World Discovery established a new Global Alliances Department to focus on building international partnerships and alliances. The department plans to initially focus on Europe, Australia and Asia."

Collette Vacations.

Collette Vacations was founded in 1918. Collette Vacations is the oldest escorted tour operator in the United States. Collette travels to seven continents and to over 300 destinations and 50 countries. The company sells to baby boomers and mature adults. Their motto is: "Discovering it all with Collette." According to the Collette Vacations web site (2003): "we choose features that bring out the flavor of an area: centrally located hotels that mirror the architectural style and ambiance of the city; cultural entertainment that's fun and educational; unique dining experiences that turn into memorable events. "

Collette's escorted tours have a great balance of sightseeing, entertainment and leisure time topped off by the services of a Collette Vacations tour manager. Each preplanned itinerary includes hotels, fabulous regional cuisine, local entertainment,

sightseeing, ground transportation, directions and tickets - all the details necessary for a truly authentic travel experience.

Collette Vacations expects employees to have the following skills when employed in a sales capacity:

1. Develop, maintain, and expand existing client base.
2. Generate new business by telemarketing, cold calling, and research.
3. Represent the company at industry trade shows.
4. Research local travel market and develop a marketing plan.
5. Service travel agencies and group clientele.

Collette is known as a tour operator that places an image in the customer's minds that they can go on a fully escorted, deluxe tour for a bargain price. Value and price are key features in the sales and marketing approach.

Prism

Prism was founded in 1989 and their motto is: "Bringing you the World." The Prism company program provides airfare, lodging, meals, sightseeing events, local pickup, cancellation protection, and a professional tour director to create an atmosphere of a worry-free vacation. Prism takes approximately 8,000 baby boomers and mature adults on tour each year.

The researcher located a Mesirow Financial Report developed for Prism. According to the Mesirow Financial web site, "Mesirow is a Chicago-based firm that serves small and mid-sized businesses. In each case...goal is to do what it takes to...reach their objectives, and do it better, more efficiently." Mesirow Financial created a consultative report for Prism.

The following key information was extracted from this report. The travelers that travel with Prism like the convenience of their travel value as compared to vacations with separately purchased travel components. Prism programs are not commodity travel

items; however, the company adds value by providing clients with a rich travel experience, conveniently packaged and at a cost savings that the customer could not get on their own by any other means. Their travelers are active adults who recognize economic value and recognize enjoyment of traveling in a small group with a knowledgeable guide.

Prism concentrates on attaining high passenger volumes while maintaining low company overhead, and avoiding expensive marketing programs. By doing these things, Prism can reduce costs but not quality of the tours. The tours are also considerable consumer value. Prism believes price is not the factor that drives customers to their product. The company believes that destination, reputation, brochure information, or a friend's referral as the most important factor for choosing Prism.

Sales and marketing techniques of Prism include direct sales and direct marketing. Prism employs eight sales people who call on small and mid-sized organizations that offer company products as part of their marketing efforts. The sales staff is broken down into eight geographic territories including: Alabama, Georgia, Minnesota, Illinois, Indiana, Iowa, Kentucky, Michigan, Ohio, Pennsylvania, and South Carolina, North Dakota, Wisconsin, and parts of Missouri and Florida. All of their sales representatives are required to sell at least \$1 million in revenue and after three years generate \$1.5 million in sales. According to the Mesirow Financial Report (2000):

The sales force is well trained and experienced. They train their employees by participating in joint calls with an existing sales person. A new hire works alone for a few weeks and then travels with the sales manager for technique review. Daily phone contact and sales meetings every ten weeks keep the sales force motivated and reinforce proper selling techniques. Prism sales professionals currently average three years of experience with the company (p. 16).

Prism also plans to hire two additional salespeople to work with group accounts. They hope to expand to 18 salespeople over the next three years. The profit or annual growth is quite strong for this company. They have shown eight percent annual growth in revenues over the last few years. The company attributes the improved profit performance to higher margins on tours for individual travelers and consumer protection products such as insurance.

Every year Creative Vacations researches these three tour operator competitors to determine what and how they are selling. The following are four primary differences between Creative Vacations and the competitors:

1. Tauck Worldwide Discovery does not include airfare but they stay at four and five-star hotel properties.
2. Collette does not include airfare in their tour price and stays at three star hotel properties; however the company creates a value price that is considerably lower than Tauck and Creative Vacations.
3. Prism does include airfare and provides home pick-up transportation to the airport.
4. Creative Vacations provides airfare included in the tour price and stays at three and four star hotel properties.

Creative Vacations, along with the competitors, is looking for imaginative ways to sell and market their products. Tour operator comparisons indicate the importance of having skilled sales and marketing employees. The nature of the tour operator business is selling to the same group of mature adults; therefore, it is critical to the sales representatives to have an on site sales reference manual at Creative Vacations.

Because of Creative Vacations small department size and the varied tasks that each sales employee is required to participate in, a Sales Manager Reference Manual will provide resources to enhance sales skills and to increase profits.

The trends in the travel industry are changing daily. As a competitive tour operator in today's market, tour operators must continue to think in terms of enhancing the product. According to the Travel Business Status Survey (2003), "the greatest opportunities today are partnerships and new consumer markets and niches" (p. 2).

The Sales Manager Reference Manual will assist the company with better sales skills to develop new consumer markets and niches.

Summary

This literature review defined the baby boomer market and mature market for tour operators, defined the word reference manual, provided examples of definitions of other company reference manuals, described three key competitors, and listed the skills tour operator competitors require of their employees.

Chapter III

Methodology

Introduction and Background

The purpose of this study was to design and develop a Sales Manager Reference Manual for Creative Vacations. With the possibility of adding additional sales people in first quarter of 2004 and the competitive nature of the travel industry, the researcher wanted to create a proactive approach to face the challenges of the future.

The objectives of this study were to:

1. Determine if a Sales Manager Reference Manual was needed for the sales department.
2. Determine if competitor tour operators have a Sales Manager Reference Manual.
3. Design and develop the Sales Manager Reference Manual.

This chapter will provide an overview of how the Sales Manager Reference Manual was created. The reference manual will be a self-directed resource tool for the Sales Manager and the sales representatives. By researching sales practices, as well as having a reference tool available on site, the business need for this project was to increase revenue for the company.

Research Procedures

The first step taken was to clarify and define what a Sales Manager Reference Manual is. It was defined and examples of corporate reference manuals were also defined. The researcher then highlighted key trends in the travel industry to highlight the importance of the constantly changing travel environment. Three tour operators that sell similar products to Creative Vacations were discussed. These three competitors were: Tauck World Discovery, Collette Vacations, and Prism. The fierce competition in the travel industry created the need for a well-versed, competent, and proficient sales team.

The second step was to create an outline for the reference manual. Several references were used to develop the outline for the Sales Manager Reference Manual: Crom & Crom (2003); Kasper (2002); and Miller (2001). The reference, Proactive Sales Management (2001) by William Miller, was helpful in determining specific topics to include in the resource manual. This book assisted the researcher in determining topics to include in the resource manual. After researching current sales management books and articles, the next step was to develop an outline to organize the manual into chapters. The outline is located in Appendix A.

The third step was to determine which topics were important to the Sales Manager and the sales department in order to help the representatives develop better sales skills. The manual provided the basic skills a manager should follow to manage a sales team. The manual was formatted to be used by everyone that works in a sales capacity. The articles can be applied to everyday sales activities such as: prospecting, leads, presenting, objections, and closing.

The fourth step was to structure the manual into appropriate chapters for clarification or quick reference.

The manual can be helpful when a sales representative has had difficulty with closing the sale. Closing the sale creates a constant challenge for sales representatives with key accounts. The topic becomes addressed at every weekly sales meeting. One of the references (Selling Power, October, 2003) provided a chart of five closing strategies and 15 effective action steps.

Chapter IV

Data Analysis and Results

Introduction

The purpose of the study was to identify the need for and the development of a Sales Manager Reference Manual for Creative Vacations. This chapter will present the findings gathered to address the research objectives. The information is organized by research objective.

Analysis of Findings

Objective one was to determine if a Sales Manager Reference Manual was needed at Creative Vacations. The researcher defined what a reference manual is. The reference manual should include an outline and informative articles relating to the nature of selling. After analyzing trends in the industry, baby boomers and mature adults are still traveling. Mature adult travelers have the time, money, and the mindset not to deter them from traveling. Based on the war in Iraq, the economy, and booking on-line, it appeared that Creative Vacations competes with other tour operators for the same group of people – baby boomers and mature adults with time and money to travel. The trends in the industry also indicated that there would be a growing interest to experience culture, arts, and history. Creative Vacations, along with Tauck, Collette, and Prism have similar itineraries that go to the same historic cities such as Washington, D.C., New York, NY, and San Francisco, CA. When selecting a tour operator, this creates competition in tour itineraries because consumers have many choices.

Reference manuals have been found to be effective for other companies outside the travel industry. For example, New Results is a Human Resource consulting company that developed a manual for rapid new hire training. The manual was based on a problem, solution, and results format. New Results (2003) stated: “the new

employee was empowered to succeed on their own. With the help of the training and reference manual, new sales calls were scheduled and within a week a sale was closed.”

Objective two was to determine if competitor tour operators have a Sales Manager Reference Manual. The tour operator business is extremely competitive and many tour operators do not give out company confidential information. For example, at tour conventions, Tauck Tours will not sit at the same table with a competitor because too much information about their company may be divulged; therefore, no examples of reference manuals were found in the literature.

Objective three was to develop the Sales Manager Reference Manual. The researcher utilized articles from various sales books and periodicals.

Research indicated that there are basic requirements that a company needed to provide to the sales team before being trained in other areas of the company.

According to Kotler (1999), sales representatives need to be aware of the following 10 items to effectively sell their company’s products and services:

1. Sales reps need to know and identify with the company in order to succeed. Company history, objectives and lines of authority should be determined and communicated. The company’s financial structure and sales reports need to be provided to sales reps in order for them to succeed. The Sales Manager Reference Manual will provide basic information about the company.
2. Sales representatives need to know the product line. Sales representatives need to be shown the company products, how the product is sold, and how the product generates revenue for the company. The reference manual will provide a company catalog with all tour products.
3. Sales representatives need to know customers’ and competitors’ characteristics. Sales representatives need to learn about the different types

of customers and the buying motives and buying habits of the customer.

The reference manual will provide competitor information and a customer profile.

4. Sales representatives need to know how to make effective sales presentations on the telephone or in person. Section VI of the resource manual refers to how a sales manager can coach their current sales team.
5. Sales representatives need to receive training in the principles of selling which are leads, prospecting, cold calling, presenting, closing, objections, listening and up selling. The basic selling principles will be accomplished with on-the-job training; however, section VI of the resource manual refers to the basic principles of selling.
6. Sales representatives need to understand field procedures and responsibilities. Sections IV, V and VI of the manual refers to field procedures.
7. Sales representatives should with guidance from their manager be able to establish a realistic and attainable goal each year in terms of revenue performance. Section XI of the manual refers to goals setting.
8. Sales representatives should have some kind of performance tracking in place to assess their progress by the week, month, quarter, and year-end. Section IV and XI of the manual refers to performance tracking.
9. Sales representatives should be sent to some type of product update training on a yearly basis. Section II of the manual refers to articles on training. Creative Vacations holds monthly training sessions reviewing current and new tour products

10. Sales representatives need to have drive and motivation to succeed; therefore, all sales teams should provide some type of reward or incentive to keep sales teams motivated. Section VIII of the manual refers to incentives.

Conclusion

After reviewing some of Creative Vacations key competitors and defining the trends in the industry, it appeared that Creative Vacations and its competitors sell to the same group of customers: baby boomers and mature adults. Customers searching for tour operators that provide escorted tours are seeking to find a company that can offer them value in terms of price and quality. Tour operators could benefit from a standardized, self-directed sales reference manual.

It appears the development of a self-directed Sales Manager Reference Manual would be beneficial to Creative Vacations.

Chapter V

Conclusions and Recommendations

Introduction

The future of the travel industry for the mature adult population will continue to be competitive due to the number of companies selling similar products. Faced with terrorism threats and future war outbreaks, it will be critical for Creative Vacations to employ sales people who can sell in any type of economic climate.

Creative Vacations will continue to increase its sales base every year; however, the company would like to focus on how to sell more tours with fewer staff. The Sales Manager Reference Manual was designed to provide on-site references to the current sales representatives and employees that work in a sales capacity.

This chapter summarizes the objectives of the project and provides conclusions and recommendations.

Summary of Research Objectives

A variety of resources were used to develop the Sales Manager Reference Manual. The objectives of this study were to:

1. Determine if a Sales Manager Reference Manual was needed for the sales department.
2. Determine if competitor tour operators have a Sales Manager Reference Manual.
3. Design and develop the Sales Manager Reference Manual.

A sales manager reference manual can enhance the skills of the sales team and provide a reference manual on-site at Creative Vacations. The competitor information indicated that Creative Vacations, Tauck, Collette, and Prism all agreed on what skills are needed by their sales employees. A Sales Manager Reference Manual will enhance

a standardized approach to the sales process. This will provide a means to increase profits and lead Creative Vacations sales representatives to develop better sales skills.

Conclusions and Recommendations

The following are nine suggestions for effectively using the Sales Manager Reference Manual:

1. Use the manual to help employees during high call volume. For example, the employees could utilize the manual to find helpful tips about price objections or how to up sell to a customer.
2. Assign one sales representative to locate one article in the manual and use it as a topic of discussion at a weekly sales meeting.
3. Select specific topics that the department is having difficulty with and at year-end, develop a one-day training forum on this topic. For example, how to sell quality into sales presentations, etc.
4. Use the reference manual to create job aids for a new sales representative. For example, create a cheat sheet listing the top 5 price objections and how to address them with a client.
5. Provide role-playing case studies for the sales representatives. Utilize some of the articles in the manual to develop role-playing exercises.
6. Locate a problem account and look for better ways to provide customer service to the client. For example, select the largest account and discover new ways to provide outstanding customer service.
7. Determine if leads are qualified. For example, develop a way for your account representatives to review current accounts and determine how the account was first established.
8. Look for better ways to do things and use time more wisely by reviewing some of the articles on Time Management in section II of the manual.

9. Utilize the manual to train other departments within the company that have a sales focus. For example, provide telephone tour sales consultants with a job aid that focuses on key phrases to let the customer know you are listening or that you care.

Conclusion

The Sales Manager Reference Manual can be effectively used internally at Creative Vacations. It is designed to be self-directed and can be utilized for every day sales challenges, as well as for the creation of sales training seminars or activities. It will allow sales people to become smarter, productive, and successful sales people.

NTA Chairman Kathy LeTarte stated; "We have no control over our environment, we have ultimate control over our response" (NTA Annual Report, 2002). This is the motto that most tour operators live by today because of terrorism and the economy. This statement also indicates why it is important to have a Sales Manager Reference Manual available on-site so Creative Vacations can respond to daily events.

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Appendix A

Outline for Sales Manager Reference Manual

- I. **Proactive Sales Management**
 - A. What is the role of the Sales Manager
 1. What makes a successful sales manager?
 - a. Management styles
 2. What are the daily tasks of a sales manager?
 - a. Sales Management Trap
 3. What Expectations are placed on the sales manager?
 - a. Five strategies for leading people
 - B. Managing the Process – Not just the People
 1. How to Develop a Sales Force
 2. Develop Objectives
 3. Call for help
 4. Have Your People Manage Themselves
 - C. How Do I know I am an Effective Leader?
 1. Creating a Sales Culture
 2. Be Proactive
 3. Develop Objectives
 4. Call for help-train them to prepare for the unknown
 5. Have Your People Manage Themselves
- II. **Manage your Time and Your People**
 - A. Manage Time
 - B. Plan – Focus on Tomorrow
 - C. Measure – Setting Measurable Objectives that Work
 - D. Sales Meetings – When & how to have successful meetings
 - E. Sales training
- III. **Finding and Recruiting the Best Sales Team**
 - A. How to Interview and Hire the Right Salesperson
 - B. Hiring Process – Article – Top 10 Traits of Great Salespeople
 - C. Initial Homework
 - D. Where to find the Good Ones
 - E. Prepare for the Interview – Behavior Based Interviewing
 - F. Interview Process
 - G. Closing the Deal – A New Hire
 - H. What size sales force is right for your company
- IV. **Tools for the Sales Team**
 - A. Track Leads
 - B. Reporting Procedures
 - C. Getting Reports on time
 - D. Expense Management

- V. Corrective Action in your Sales Team**
 - A. Counseling
 - B. Written Warnings
 - C. If you have to terminate

- VI. Pro Active Management Skills to Assist the Sales Representatives**
 - A. Coaching and Counseling
 - B. Coaching Sales Calls
 - C. Motivation- Know Why People Do What They Do and Be One Step Ahead
 - D. Five Sales Training Competencies

- VII. Territory Planning - Strategically Deploying the Sales Team**
 - A. Five graphic Assignments
 - B. Account Assignments
 - C. Product Assignments
 - D. Winning back old accounts

- VIII. Compensation & Rewards**
 - A. Create Leverage
 - B. Rewards
 - C. Commissions

- XI. As a Manager – Create and Develop an Action Plan**
 - A. Short term vs. long-term goals
 - B. Measurable goals
 - C. Communication
 - D. Teaching Leadership
 - E. Team Building

Appendix B

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