

QUESTIONS-AND-ANSWERS LIST FROM THE DWHSA SUMMER SCHOOL

Thanks for submitting so many amazing questions after the first Zoom call with Kim and Suzanne! We've collected every single question that was typed into the "Chat" window during the call or sent to us at support@dwhsa.com, and we've typed quick answers below. (If you have follow-up questions once you read this list, please reach out any time at support@dwhsa.com.)

DWHSA has conducted destination wedding (DW) training since 2010 – so, on many topics mentioned in these questions (from wedding shows to managing couples' expectations, from planning the actual DW ceremony to setting your fees), we offer our members very in-depth training webinars and videos that go into much more detail. Stay tuned – at the end of the Summer School, we'll give you details about how you can join us if you're ready!

Q. I have my first bridal expo in two weeks. How do I prep for it?

A. Congratulations on scheduling your first wedding show! The first step is checking the impression you're giving the public, starting with your web site. Does the branding, the domain name, and the home page make it obvious you offer DWs? If not, that's something you can change over time (so prospects you'll meet at future shows realize you offer DWs). Do the same "check" with your social media accounts.

Next, do some research on the show. How many consumers usually attend the event? How many other travel advisors (and suppliers) are expected there besides you? And, will you receive a copy of the attendee list (with email addresses) after the event?

Then, plan your booth. Set it up with a banner or large sign that explains you're a DW specialist. Put the table the show provides in the back of the booth so you can stand in front and greet people as they pass by. Don't stock your booth with supplier brochures or flyers; instead, create a one-page handout that explains your services and offers a DW consultation with your contact information and give that out instead. And, think about doing a giveaway from your booth with a prize that's not expensive (e.g., a gift basket you can create yourself or an affordable carry-on bag) and collect signups in the booth.

Finally, get ready to begin following up with contacts immediately after the show! Write your first follow-up email message before the show so that you can send it quickly using email addresses you collect from your booth giveaway – and send a series of follow-up emails to those people (plus the ones on the show's attendee list) in the

weeks and months afterwards. (There's lot more advice we share with members about wedding shows, but this will get you started!)

Q. I don't see any videos or materials on the DWHSA Summer School resources page. Will those be coming or am I missing something?

A. On the DWHSA Summer School resources page - <https://bit.ly/DWHSASummerSchoolResources> (password: DWHSA789*!) – we will load each class video on the Friday after the live Zoom call. That same day, we'll also load the Q&A list from that class. So, starting later today (Friday, Sept. 5), you'll begin seeing videos and Q&A lists there!

Q. Can we get a copy of the questions to ask on that form [given to prospects to fill out before the consultation takes place]?

A. We have sample intake questionnaires and a "master list" of consultation questions you can ask prospective DW couples, but those resources are limited to members. However, here are two key questions you might ask prospects before you schedule the consultation: (a) When are they thinking about getting married? (so you'll know how much lead time you have), (b) How many guests are they considering inviting? (so you can cut that number in half and get a good idea of how big the DW group might be). What about questions like budget and location, you might ask? You can ask those too, but many times, DW couples just don't know enough yet about ceremony costs and resorts to give you useful answers.

Q. Is budget one of the questions on your intake form?

A. It definitely can be! It's always a question once you get into the consultation with the couple. There are two budgets really that you need to discuss with DW couples: (a) the ceremony budget (how much they want to spend on the actual vows, plus the reception and any other on-site events such as a morning-after brunch), and (b) their guests' travel budget (how much they believe their average guests will be willing and able to spend on attending the DW trip). Make sure you ask about both budgets at some point.

Q. Do you recommend charging a consultation fee?

A. As an independent agent, of course, you may charge any fees you wish! But, generally, many DWHSA members do not charge couples for the DW consultation (usually 30 to 60 minutes). Basically, you're contributing that time to the couple once you've decided they seem to be good DW prospects. Once you conclude the consultation, though, we do recommend that – if you charge service or planning fees for the actual DW trip – you collect those fees before you spend any time doing trip research and preparing a proposal for the couple. That way, you're protected if they receive your proposal and then "ghost" you.

Q. You seem to deal with specific properties and destinations. Is it important to specialize like that?

A. For most agents – especially when you’re getting started in the DWs niche – it makes more sense to learn about different destinations and suppliers before you narrow your focus. Until you’ve gotten your feet wet, honestly, you don’t know enough practically to make the best picks for specializing! Over time, though, you might consider narrowing your focus to (a) specific regions (e.g., Mexico and the Caribbean) and (b) your favorite preferred suppliers (so you can maximize your commission percentages). That doesn’t mean you won’t help that couple requesting a ceremony on an African safari of course! It just means you’ll concentrate your time on destinations that will grow more familiar for you and on suppliers with which you develop deeper working relationships. (A small number of DWHSA members do decide later to specialize very narrowly – e.g., LGBTQ DWs, DWs for blended families – but you should be confident that market is large enough to give you a steady stream of prospects over time.)

Q. How do you get started finding couples?

A. In the Summer School, we’re focusing primarily on the DW workflow – but, for members, we do a TON of training all year around on marketing topics! For starters, we recommend again that you look at the first impression you’re giving prospects. Do you have a brand, a web site domain, and a home page that “scream” the fact that you offer DWs? (If not, you don’t need to rebrand completely – instead, many members will pick a “sub brand” name and set up a small web site focused solely on DWs.) Next, think about your ideal client types – the couples you think you’ll work best with in terms of age ranges, income levels, geographic areas where they live, etc. That step will help you concentrate the way you promote yourself in your local market area.

One great idea is “reintroducing” yourself to everyone currently in your database. Send an email to all contacts telling them you’re moving ahead with offering DWs in the future and ask them to refer you to anyone they know who’s thinking about a DW.

The key for many small-business-size advisors is looking at your local market area (i.e., a half-day or full-day drive around your storefront agency or home-based office) and thinking about the ways you can get in front of those ideal types of DW clients. Options can include wedding shows and other consumer events (some DWHSA members swear by tables at popular farmers markets!), monthly or bimonthly marketing emails you send to your entire database with romance travel tips and trip ideas, referral relationships you can build over time with other romance- and wedding-related businesses in your area (including local wedding planners), and offering a DW-specific lead magnet (e.g., a PDF with tips for local couples planning a DW). For members, we do specific training in all of these areas (and more).

Q. Would either of you be willing to share samples of your forms and workflow?

A. Inside DWHSAMembers.com, we have a Resource Center that we've filled over the years with sample forms collected from members! And, as far as workflows, we've found the 12-month timeline a DWHSA committee created in 2021 is the best workflow we have: <https://dwhsaresources.s3.us-east-1.amazonaws.com/DWHSA+DW+Workflow+Final+Version+June+2021.pdf>.

Q. How do you build your fees and build packages so you don't undercharge?

A. Setting reasonable fees when you're getting started with DWs can be challenging! Many members take the 12-month workflow linked above and look at the different tasks involved with a DWs. Then, they think about the average DW group size they'll work with and calculate possible commissions. Finally, they'll decide if those commissions will compensate them for the 12 months of work or if they need to charge fees. Other members simply pick fee amounts they think will be accepted in their local market and then "tweak" those amounts as couples react to them. As you're getting started with DWs, it might be best to pick a single base fee for helping couples with DW planning and then adjust it over time. It's easier to start low and increase fees later than charging a lot when you start and risk turning off clients!

Q. Do either of you send any materials after prospective couples contact you but before you do the consultation, such as a one-page PDF or Canva doc or a link to a webpage telling couples how you work or explaining the process of working with you? If so, what information do you put on there (or leave off there)?

A. Many DWHSA members have created a "How We Work" page on their sites that explains the DW planning process (e.g., "First, we'll schedule a consultation with you ... then we'll give you a proposal ..."). Setting up a web page like this may work better than a PDF or Canva document because you can change text on the web page more easily (while the page link would stay the same). They've also built out their "About Us" page on their sites with lots more DW information (their DW experience, their DW specializations, etc.) Generally, you could build those two pages and give out those links before consultations, and that will work well! You can include just about anything on those pages (remember – add photos as well as text, such as pictures of you on site inspections or meeting with couples), but the only information you might leave OUT is specific fee amounts for DWs. When prospects meet you in the beginning, honestly they don't know enough yet about you and about how DWs work to look at fee pricing and decide if you're worth that. So, withhold your specific fee amounts until you talk directly with couples during the consultation.

Q. At what point in the whole process do you tell the wedding couple and the guests that bedding requests aren't guaranteed (meaning the resort won't guarantee two queens or one king bed)?

A. Bedding questions generally come up later when you begin processing individual guests' reservations for the DW trips. During the consultation phase, you probably don't need to cover this specifically, unless you want to say something general such as "Many aspects of planning your DW – from confirming the specific venue you want to locking in bedding requests from guests – are always subject to availability." But, when you're ready to begin accepting guest reservations, that's definitely the time to tell them (in clear language in the trip details given to them) that bedding types and other special requests cannot be guaranteed in most cases.

Q. How long should you tell couples it will take you to give them a quote or proposal?/What is your usual turnaround time to get quotes to clients once they pay your service/planning/research fee?

A. Most DWWSA members try to deliver the DW trip proposals within one week of receiving any service/planning fees they charge and the signed client agreement from the couple. We recommend making it clear to couples that, although you'll begin working on their DW plans after the consultation appointment, they won't receive your proposal until they've signed your client agreement and paid any fees you charge for planning the trip.

Q. What do you charge as a research or design fee?

A. "DW planning fees" can vary wildly depending on the geographic region you're in and the level of service you provide (e.g., are you booking travel arrangements only or will you do that plus act as the couple's ceremony planner too?). For basic DW services (booking travel arrangements and introducing couples to the supplier's on-site wedding coordinator), those fees might range from USD\$100 to \$500 or more (plus your commissions of course). If you'll also be the couple's ceremony planner (or even accompany them on the trip yourself to help guests on site and provide "day of" ceremony coordination), those fees can start at \$1,000 and go up from there. At the basic level (mainly travel bookings), you might calculate the commissions you expect to earn and look at the fees as "icing on the cake" – a little extra to cover your time talking with the couple about DW plans and turning them over to the on-site coordinator. But, if you get involved in ceremony planning or you plan to go with the couple to help them, you should really list out the ceremony planning tasks you'll take on and then decide how much to charge to cover your time. (If you go with the clients, typically they will cover your travel/lodging expenses.)

Q. How do you handle it when guests start comparing the pricing you're quoting to pricing they find on the Internet?

A. This is always a huge challenge! We cover this question in much more depth for members – but, for starters, many members try to teach their couples how group pricing works compared to individual traveler pricing found on supplier sites and online travel agencies. For example, many consumers think of booking rooms as if the price always goes down based on volume – if the DW group has 50 rooms, they believe, the individual room price in the group should always beat any sale prices they'll find on the Internet. But, as an advisor, you know that it's easy to find lower pricing for one room here and another single room there, but those prices would not apply across a group of 50 rooms. Lower prices on the Internet are usually capacity controlled – they're good only for a small supply of individual rooms. Also, group room prices also reflect the resort's services for the entire group such as the DW ceremony itself, the use of the venue, etc. Here's the best advice we can share on this topic here: It really pays to teach your DW couples a little bit about how group pricing works – make sure they understand why guests might find lower prices on their own for a room here and there. If they understand you've done a great job getting group pricing for them, many times they will help ensure that their guests don't get out of control complaining!

Q. Can Suzanne share her "no sell" list?

A. For antitrust reasons, she's not allowed to share that – it might be seen as her trying to influence other agents to "boycott" certain suppliers, for example. As you work with more resort brands, you'll develop your own opinions about which properties are great to work with and which ones cause more problems than they're worth – and of course you'll always have the legal right to pick and choose the properties you prefer to recommend to couples.

Q. How do you present your proposals? Do you schedule a call to go over them or just send them and let clients review them on their own and then reach out to you afterwards?

A. Many members use some of the tools mentioned on this call – including Travefy, your CRM (check with your vendor – you might be surprised at the proposal-building tools in your CRM that you're already paying for!), AXUS, and others. Others use "off the shelf" programs like a free account with Canva or Adobe Express. Here's one key takeaway: Make a list of the pieces you want to include in every proposal – e.g., an intro section that reminds the couple of the key things they asked for in the trip (e.g., adults-only lodging, a rooftop ceremony venue) so they can see you covered everything they asked for. Then, take that list and create a proposal template – a design or outline that you can use with one couple and then copy and change for new couples (so you're not "reinventing the wheel" with a new design every time). This step alone will save you

tons of time as your sales volume grows! While some members do simply email a link to the proposal to their couples, other members will schedule a phone call or Zoom call to go through the proposal with the couple (and others use video tools like Loom to record themselves explaining the proposal and then send the video to the couple). However you send it, it's important to let the couple know what the next step will be – don't leave it totally up to them to decide when to get back with you! (For example: "Hi, Chris and Pam – here's the proposal with my best ideas for your Cancun DW! It's Tuesday, so let me give you a few days and the weekend to look this over. I'll give you a call next Tuesday, a week from today, to see what you think.")

Q. What standard questions do you make sure to ask during consultations – especially about resorts and what the clients want to book on their trips?

A. Regarding resorts, you should pin down whether they need adults-only or family-friendly options (or both, such as a property with two sections). Check the transfer distance from the airport – i.e., if they want a property type that's a 60-minute drive over unpaved roads, will their guests be comfortable with that? Another resort-related question is specific room categories (e.g., do they want swim-up suites but the property doesn't have any?). And, with DWs, ask about specific ceremony venue types (e.g., do they want a gazebo on the beach, or will they be happy with a ceremony on the sand?). As far as what they want on the trips, you should ask about specific excursions or activities they want to do as a couple only or with their guests (e.g., specific spa treatments, rounds of golf) so that you can check that with resorts or plan to use vendors such as Project Expedition or Viator to set those things up.

Q. What tool do you use to send out forms and track the responses?

A. Many members keep this simple by creating forms using form-building features built into their CRMs, their web sites, or their email services (e.g., MailChimp, Constant Contact). Sometimes, members will use separate software such as Jotform, but in most cases you're probably already paying for tools that include the ability to build forms. Generally, those tools will send you an email with the answers once the couple has filled out your form (or you may need to log into a web page to view the responses). Check with your CRM, your web site company, and your email services vendor for details.

Q. Do you have a checklist of what should be on your terms and conditions and in your client agreements?

A. After the pandemic, most couples understand that travel contracts now contain more terms and conditions than before! We offer members an entire webinar video covering a big list of clauses they should consider having in their client agreements or in their "terms and conditions" documents, but here are a few critical ones: (a) detailed bullet-point lists of the specific services you will – and will not – provide for your DW clients,

(b) payment dos and don'ts (from what deposits the couple is expected to put down upfront for the group to what happens if a guest fails to pay in full for the trip once the group is in penalty); (c) a "bad behavior" clause explaining that the couple is responsible for guests who get out of control on site, and (d) a "chargeback" clause explaining what you will do if a guest requests a debit/credit card chargeback on the trip.

Q. In your client agreements, do you add a paragraph that states if a guest cancels with you but has no travel protection or insurance, but the group is within the supplier's penalty period, then the wedding couple must pay any remaining balance due for that room?

A. It's important to have language in your clients outlining what happens when guests fail to pay in full for the trip as booked through you. The approach mentioned above is definitely a smart way to handle things. Many times, you're in much better shape holding the couple responsible if their guests misbehave or fail to follow through on their obligations – they're in a much better position to exert pressure on those guests to make things right!

Q. Can you resend the download link for the DW workflow document?

A. Sure! Here's that link: <https://dwhsaresources.s3.us-east-1.amazonaws.com/DWHSA+DW+Workflow+Final+Version+June+2021.pdf>

Q. How do you set the deadlines by which the guests need to book?

A. Generally, the supplier's room/cabin block contracts will specify the deadlines for guests to pay deposits, interim payments, and final payments. (These days, interim payments between deposit and final payment are much more common than before COVID.) So, most members will just copy those deadlines, "pad them" by adding extra time, and giving those new deadlines to guests (e.g., if final payments are due July 1, you'd tell guests the deadline is June 15 or even June 1). This padding helps immensely if guests' credit card payments don't go through initially or if guests are slow to respond when you send payment reminders. Remember: Your CRM probably has built-in email and invoicing functions you can use to send automated payment reminders to guests!

Q. How do you handle the payments that might have been made by a guest who dies before the trip takes place?

A. This would be a sad situation, ugh! Generally, the same rules would apply as if that guest were scheduled for an FIT trip you'd booked: Travel insurance might kick in if purchased by the guest; otherwise, the supplier's rules on nonpayment and cancellation would apply even in situations like the guest's death. (Avoid the temptation to intervene with the supplier arguing for an exception to refund the guest payments – despite the

terrible circumstances, guests should really purchase travel insurance for their DW trips every time.)

Q. What is a chargeback, and how do you charge the couple for the chargeback?

A. A “chargeback” is a request filed by consumers with their banks (for debit cards) or their credit card issuers disputing a charge – basically, claiming that they were defrauded or they didn’t receive the promised product or service. In DWs, chargebacks usually happen when a disgruntled guest returns home from the trip and disputes the payments made to your agency, claiming that the room wasn’t satisfactory or there were other problems with the trip. The danger for agents is that, even though the supplier (e.g., the resort company, the tour operator) probably processed the charge on the consumer’s card, suppliers will typically come back to agents to reimburse them for the refund given to the consumer. We give members language for their client agreements that make the consumer ultimately responsible for the amount of the chargeback loss. And, many members have language in their client agreements with couples making the couples financially responsible for paying back any successful chargebacks their guests ask for. Language like this can protect you against losses that probably weren’t your fault to begin with!

Q. What types of comps come after a destination wedding?

A. "Comps" mean perks and benefits - e.g., resort credits, room upgrades, free rooms - that the DW couple will qualify for based on the total number of room nights booked by their guests. Usually, the supplier's group room block contract will specify the formula for earning these comps (e.g., "1:25" means 1 free room for every 25 paid room nights). Suppliers will calculate the couple's comps a few weeks before travel or just before arrival, and the comps are given to couples as credits on their room/ceremony services bills or as a cash refund. In addition to free rooms, the comps may also include other amenities such as free basic ceremony packages, discounts on catering or spa services, and extra hours for other services such as the wedding reception.

Q. Do you ever keep any portion or percentage of the comps for yourself?

A. Because many suppliers will actually pay the comps to the agency first instead of the couple, some advisors do keep part or all of the comps for themselves (as earned revenue). This is totally your decision as the agent! It’s always a good idea to hold onto the comps for a few weeks after the DW trip dates so that you’ll have those funds yourself if a DW guest requests a “chargeback” that you may be forced to cover or if the couple incurs unexpected expenses after the ceremony.

Q. What tools do you use to stay organized?

A. One challenge with DW groups is they require lots of attention to detail over an extended period of time before travel (up to 12 months or longer)! So, it's critically important that you use tools to track to-do items for every DW group to avoid missing a task or deadline that could derail the DW. Many members use the task lists and reminders in their CRMs for this purpose. Another popular tool is Trello.com. Even an Excel spreadsheet for your DW groups – with one worksheet per group and the to-do tasks listed row by row and highlighted by color as you complete each to-do-item – can help you stay organized!

Q. Do you apply your service/planning fees toward the final payments?

A. This practice is called “plan-to-go deposits” – if the guests go on the DW trip, their initial deposits are applied against the amount of their final payments, but those deposits turn into nonrefundable service fees if the guests don't travel. This approach was very common before the pandemic, but we find most DWHSA members don't follow this now. Instead, the guests' initial deposits are paid directly toward their trip costs, and any initial service/planning fees above the trip costs that the agency might charge are simply collected as nonrefundable fees.

Q. Don't the couples need to know (legally) the terms and conditions of the tour operator)?

A. Generally, yes, but there's rarely any need to give clients the actual supplier “paperwork” that might show not just the terms and conditions but also confidential details such as your commission amounts. Most members will copy the supplier's terms and conditions that apply to the DW trip (e.g., cancellation terms) and paste them into the documents the agency will send ultimately to the travelers. Some members who have tougher terms will just substitute their terms as long as they still satisfy the supplier's rules (e.g., if the supplier says guests may cancel with no penalty up to 60 days before departure, but the agency charges a penalty for cancelling after 90 days before departure, then of course the agency's rule would still satisfy the supplier's cancellation requirement).

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