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## MouseEarVacations.com<sup>®</sup>

### Independent Contractor (IC) Policies

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## BUSINESS / ACCOUNTING

### Commission Levels

Category	Travel Type	Outside / IC's own client	Inside / Lead client
Car	Rental Car Only	60%	50%
Rail	Rail Only	60%	50%
Insurance	Insurance	60%	50%
Hotel	Disney Hotel Only	55%	50%
Hotel	Non Disney Hotel Only	60%	50%
Air	Air Only 14% Plus	60%	50%
Air	Air Only 13% Or Less	55%	50%
Cruise	Cruise 14% Plus Pref	60%	50%
Cruise	Cruise 13% Or Less	55%	50%
Tour	Land Pkg 14% Plus Pref	60%	50%
Tour	Land Pkg 13% Or Less	55%	50%
Transportation	Shuttle/Limos	60%	50%
Other	Misc & Park 14% Plus Pref	60%	50%
Other	Misc & Park 13% Or Less	55%	50%
Tour	Day Excursions Cruise	60%	60%
Tour	Day Excursions Non Cruise	60%	60%
Serv Fee	Prof Fee Cruise	60%	60%
Serv Fee	Prof Fee Land	60%	60%
Serv Fee	Prof Fee Air	60%	60%

\*Extra rewards to top sales agents whose gross commission earned in any Calendar year exceeds \$75,000 for CCE and MEV combined shall jump to 65% for CCE and MEV sales to their own clients on products with 14% or more commission. For purposes of this computation, any sales of products of less than 11% commission remains capped at a maximum of \$20,000 toward the count.

Gross commissions are defined as 100% of the commission earned by the sales of the IC with CCE, less uniquely attributable costs of that sale. For this purpose they are tracked by checks to the IC, for which the corresponding net payments to the IC will equal their federal 1099 form.

Adjustments to increase or decrease commission level shall be made once a year based on the previous year's total paid sales commission, and shall be effective throughout the subsequent year. The date of that evaluation shall be January 1 annually. The commission split level shall be reduced in the course of that year only if new sales should fall below the corresponding sales level of the previous year. After four consecutive months of sales below the previous year's monthly sales, the commission split on new sales shall revert to the level warranted by the current sales performance.

All commissions are paid at the level of commission applicable at the time of booking; no retroactive adjustments shall be made to bookings deposited while at a previous level.

Compensation details are subject to change with 30 days minimum advance notice to IC's. Please direct any questions to your ASC.

\*Please review the Commission Levels file in the CCE File Library for more details on supplier and travel consultant commission levels.

## Commission Minimums on Bookings

1. All bookings, including hotels, air consolidator tickets, and rental cars: In order to earn commission, every sale must earn at least \$50 or 10% commission, whichever is greater. The booking cannot be made in the company name for less than 10% commission, or \$50 commission, or \$50 service fee (whichever is greater). If the transaction is an *addition* to a booking you already have with this client, a nominal service fee of \$20 or 10% commission, whichever is greater, will be acceptable. Any bookings made with less than the required commission/service fee will result in the IC forfeiting any commission earned.
2. This policy does not apply to MEV (Disney), Universal bookings, ShoreTrips /Shore Excursion Group bookings, Signature Hotel bookings or travel protection plans. However, even with these exceptions, we encourage you to charge a professional fee for handling the booking. Remember, many suppliers allow agents to add onto your commission; please try to do this whenever it makes sense to do so.
3. This policy does not apply to IC's own personal travel bookings, subject to the IC having achieved eligibility for reduced rate travel. The agency will absorb the costs as a benefit to that IC and the IC will be paid the entire commission amount.
4. In no case may commission be waived for anyone. This includes friends and family (see CCE policy under IC Travel Benefits and Policies)
5. No exceptions will be made after the fact. Any exceptions must be requested and approved in advance, in writing by your ASC.

**\*\*PLEASE NOTE:** EVERY booking made with our IATA number MUST be entered into Client Base, regardless of commission minimums. This includes personal travel and all client bookings. For FAMs, please consult your ASC who will advise you how to enter it into Client Base (depends on the supplier).

**Business Travel** - please remember that we are a Leisure Travel company. This means we focus on leisure bookings-- cruises, land packages, tours. In the travel industry, the only way agents make money on *Business Travel* is by adding service fees per booking (flights, hotels, etc.). Please keep in mind the minimum commissions listed above *as you prepare your client quotes* for airfare-only or hotel-only bookings. And, please refer to the suggested service fee chart.

## Air Booking Policies

**AIR CONSOLIDATORS:** When booking airfare for clients, it is recommended that ICs try to book the air as part of a package when it is commissionable or you are able to add commission to the booking (land, cruise, tour, Pleasant/Journese, etc.). However, there are times when the air will not be offered, or will not fit the client's needs, and you are encouraged to provide this as part of your service. To do an independent air booking, there are steps you **MUST** follow to protect your clients.

1. Advise all clients that ALL the price quotes are tentative and subject to increases and availability until they are paid in full and confirmations are received. Often a price will increase or the flight details change or the flight is not available until the transaction is complete. Additionally, flights are very volatile and may be changed or cancelled leading to increased expenses to get your clients to their destination in a timely manner. ALWAYS provide the change and cancellation fees in writing (often many pages) to each client **before** they purchase any airfare. ALWAYS notify clients of the code share airline providing the flight service as the DOT requires this for all booking quotes.
2. The ENTIRE Air Booking Policy should be read, understood and agreed to by your client before an IC books with any of the following air consolidators. Be sure flights meet cruise line guidelines for pre and post flight times. Please direct any questions regarding minimum commission requirements, advice for timelines for client air bookings, and other important information to the Admin Team so you are sure you understand all necessary precautions.
3. We cannot stress enough the need to protect your clients by allowing sufficient time for air travel to coordinate with their other travel plans. Traveler travel protection plans should be quoted, emailed and recommended to cover all air bookings.
4. Use the CB reminders and put on your calendar to reconfirm client's flights a month prior to travel and AGAIN the week of travel. Some consolidators do NOT notify you of flight changes which would leave your clients not having proper travel connections.
5. If you are not going through one of the air consolidators mentioned below, be sure to NEVER book a flight directly with the airlines or through an online provider (Expedia, Travelocity, etc.). It will not be considered a "sale", which means you will incur liability and have no coverage under our insurance policy. AirByPleasant is our preferred air consolidator and the Suppliers Guidelines document has others who are approved. Each flight will need a separate CB reservation entered in the Main Trip Res Card. For help on how to enter

flight reservations in Client Base, please consult your ASC in the Washington office.

## **Professional, Change or Cancellation Fees and Commitment Deposits**

*(Phrases in italics are suggested script for asking for fees/deposits. Please make them your own, not reading word for word.)*

### **General Background:**

Our travel industry is changing. Competition for our cut of the pie has become more intense with the entry of big box stores and online travel agencies in the travel market. In addition, suppliers are becoming more aggressive at direct marketing and non-commissionable charges are increasing. How are home-based travel consultants and host agencies to survive in this environment? Our answer has been to focus on customer service. In the words of Vicki Freed (RCI); "We are not salespeople. Instead, we are helping our clients to make better buying decisions". As travel consultants, we are providing increased value to our clients by researching destinations and suppliers, planning and advising clients on vacation options, and tending to the many details of their vacation. We pride ourselves on providing concierge level service and "Making Vacations Magical."

### **Travel Consultant Survival:**

Kudos to those of you who are keeping an eye on your business! You are running your consulting business professionally and those who are setting goals and creating and using a business plan are seeing the results. Booking travel groups whether on cruises or to land destinations has emerged as one vehicle to generate more commission. Some travel consultants are actively seeking group bookings for affinity groups, family reunions, destination weddings and celebrations. This effort to focus on group bookings is certainly supported. A second major effort has been to include additional components in the vacation planning process. Including pre and post hotel stays, activity excursions, transportation arrangements (car rentals, flights, and transfers), and travel insurance certainly serves to increase the value of a vacation for your client and generates additional commission for you the travel consultant. Arranging for groups and including added trip components requires significant work by the travel consultant. We believe this work should be done by a trained and dedicated professional and we believe further that it is time for travel consultants to be compensated for their hard work.

### **A Suggested Professional Fee Structure:**

As an independent contractor in charge of your own business, we cannot require that you charge fees for your consulting services. However, as host agency owners, we certainly recommend that you give the topic serious attention and take steps to initiate professional fees in your business model. As we have studied the travel industry and heard from fellow agency owners, we can assure you that professional service fees are charged by an increasing number of companies. You may not want to start out with fees for every booking (you may feel uncomfortable charging family, friends, or long time clients). You may want to start with air bookings, cruise bookings with new clients, or only if you do considerable research or if the booking is quite detailed or complicated. These are individual decisions that each travel consultant must make for themselves. For those willing to begin charging professional service fees, we offer a suggested structure. Please note that this is "suggested" and that you are free to determine fee amounts that you are comfortable charging.

We have reviewed other company's professional fee documents and find they present this information to clients with confidence as part of their normal booking process. Your professional looking menu of professional services should be concise and well designed. A model is attached to serve as a guide.

## ***Change Fees***

### **1. Basic Information**

ICs are encouraged to charge their clients a \$50 per reservation change fee after the initial invoice. This fee will be split with you on the same split as your commissions. The website states, "*We reserve the right to charge a nominal fee for changes to a reservation that result in a lowered cost.*" This is applicable for both MEV and CCE.

### **2. Best Practices**

- If your client contacts you and asks for any change that will result in the price decreasing. Before making that change, you have the discretion to charge a change fee.

- *"I will be happy to make that change for you. In order to do that, there is a nominal change fee that I need to collect."*
- The client will acknowledge that they know about the possibility of a change fee when they reply to the Invoice / Payment Receipt email.
- If the client asks, "Why the fee?"  
*"In order to ensure every facet of your vacation accommodates your change, I must go back through each and every detail of your trip and make the necessary changes with the supplier(s). In order to take the necessary steps, I charge a professional fee for my services. This will ensure that your vacation runs smoothly."*

## ***Professional Fees***

1. Basic Information - A service fee charged for your services. *\*Please review the "Professional Fees" document in the library for suggested menu of fees.*
2. Best Practices
  - There really isn't a set script for charging a professional booking management fee. Before asking for it, it is important to sell yourself and your services to your clients. Let them know everything you are going to do for them and why you are qualified to help plan their vacation. The service and personalization you offer your client is what will set you apart from another agency or an online engine.
  - After selling your services, simply say, "I charge a nominal professional fee" and utilize our suggested fee chart or adjust it to amounts you wish to charge.
  - If the client asks why, reiterate what you told them before about your services. "As a professional travel consultant, the fee allows me to take the time necessary to ensure that your vacation runs smoothly and to manage all of your trip details. I will be on call whenever you need me, even during your vacation. An online booking does not provide that kind of service."

## ***Commitment Deposits***

1. Basic Information
  - We encourage the use of commitment deposits in many cases. ICs will have discretion to charge their clients a non-refundable commitment deposit. A commitment deposit goes towards the cost of the trip unless the trip is cancelled.
  - A commitment deposit isn't really a fee unless the trip is cancelled or the clients decide not to book through you. In that case, it does become a fee for the consulting, research, and booking activities that you have performed on the behalf of the client.
  - At that time, there is no additional cancellation fee from MEV/CCE. If cancelled, this fee is split with the office at the same split as your commission. The split is to cover any office expenses incurred.
2. Best Practices
  - When asking for the commitment deposit, it is important to sell yourself and the services that you offer. Don't hold back, tell the clients everything you will do for them on their behalf. If you value the work that you do, so will your client!
  - Only after presenting your proposed service and backing it up with your qualifications, should you ask for a commitment deposit.
  - *"When we make the commitment with supplier to do this, we ask for a small commitment deposit in advance from you. This does not add to the cost of your trip but applies to all applicable travel costs and agency fees. How would you prefer to make that deposit?"* (Please notice it is "How would you prefer...", and not "Are you ready?")
  - If the client asks "Why the additional deposit?" *"Our commitment deposit is not really a fee unless you cancel your trip or decide not to book with us. I am going to take the time to ensure you get your dream vacation. In order to commit that amount of time and effort into making your vacation perfect, I will need a commitment from you."*

### *How to Charge Professional Service Fees:*

- Credit Card payments to *Cruising Co*, complete and submit Payment Form to Shelley.
- Enter the professional fees in Client Base, selecting correct category, ask for assistance from Shelley.
- Shelley will invoice the amount that she processes for the client payment.

- Some suppliers allow for additional charges to be paid over the invoiced amount, please ask booking departments and notify them that this is an overpayment for additional commission to be paid to the agency.

Professional Consulting & Booking Management Fee Schedule		
Airline Tickets & Transportation		
	Domestic	International
Airline Ticket, per ticket	\$20	\$40
Frequent Flyer Research, additional up to 4 pax on one PNR	From \$50	From \$60
Rail Tickets	\$20	\$25
Transfers, Car Service, Limos per reservation	\$15	\$20
Rental Car	\$30	\$40
Ground Arrangements		
Hotel Only	\$25	\$50
WDW MyMagic+ Customization, My Disney Experience Account Set up, coordination of reservations	\$25	
Event Tickets	\$20	
Cruises, Tours, Shore Excursions & Customized Itineraries		
Booking Management per Cruise or Tour per reservation	\$30	
Excursion Planning & Reservations	\$30	\$50
Research & Consulting	\$50	\$100
Additional Booking Research available at	\$50 / Hour	
Itinerary Changes	\$50	
Printing & Shipping Service		
Document Packet Mailed versus Electronic	\$20	
*Fees are non-refundable and due prior to services provided		

## CLIENT PAYMENT POLICIES

### *Permission procedure for payments*

- Any *deposit or payment* should be made by credit or debit card. Personal checks are no longer accepted as they take up to 6 weeks to complete clear the bank.
- Only with prior ASC approval, will a client's personal check be accepted for any *payment*. *With permission*, such a payment must be received in the CCE office 6 weeks prior to the payment due date. With approval, guaranteed funds such as money orders may be accepted and if approved, they must be received 2 weeks prior to payment due date.
- If such a payment is approved, when you receive a check or money order from a client, make a copy of the check and email to the office with the payment form. Put the check in the mail to the office the same day.
- If your client mails their check directly to the office we will make a copy and email it to you, please follow up by faxing a payment request to the office.
- Last minute bookings, without proper approval or turn-around time as stated above, must be paid by credit or debit card.
- Clients may not pay by check if booking is within six weeks of final payment due date.
- Please incorporate directions to your clients stating that payments must be paid by credit or debit card.



8. \*\*At no time may a consultant or client mail a check directly to the supplier.
9. ICs must stay abreast of any potential surcharges/increases made by suppliers (i.e. fuel surcharges, changing port fees or taxes, etc.), which should be charged to the client.

## ***NSF Client Checks / Checks that bounce***

On the rare occasion that a client check is accepted with prior approval, it must arrive in the Washington Office 6 weeks prior to the supplier due date. If such a payment does not clear their bank, the payment cannot be replaced by another personal check. Acceptable replacements are: guaranteed funds such as cashier's checks or money orders overnighted to the CCE office, or credit card payments. There is a \$50 CCE service fee for returned checks, and that fee must be received by CCE in the form of a money order or a PayPal payment before the IC shall process the client's replacement payment. Thank you!

## ***Cancellation Fees***

You may waive MEV cancellation fees for all Disney trips booked between January 1 and December 31, 2015\*, for travel at any time. (*\*Disney cancellation policies still apply*). *This is a personal option for each consultant to decide and charging professional, change or cancellation fees is the standard for most professional travel consultants, even those who sell Disney.*

Basic Information - Cancellation fees vary according to total package price for CCE General Leisure vacations (non-Disney). For bookings processed through CCE: Fee is paid to CCE by the client or IC in order to process the cancellation.

- Packages under \$2,000 = \$50 per booking
- Packages \$2,000 and over = \$75 per booking
- Room-Only Reservations are still \$25 per room
- No exception to collecting cancellation fees will be accepted unless requested and approved in writing prior to the cancellation for any non-Disney vacation. The cancellation fee will be split with the IC on the same ratio as the commission would have been. Failure to collect the fee shall result in the IC paying the fee in full to the agency.

This applies to all clients, unless you have a written waiver by your ASC. Before you make the decision not to charge the cancellation fee, you must always get pre-approval in writing from your ASC before committing to the client. We make no exceptions to this pre-approval requirement. If waiving the fee is not approved, and you feel you want to waive it, you are free to do so, but you will be charged the entire fee, 100% to the agency.

There is a better option: Make the client aware that CCE has a policy that cancellation fees WILL BE CREDITED TO A NEW VACATION PURCHASE IF RE-BOOKED WITHIN 30 DAYS OF THE DATE OF CANCELLATION, FOR TRAVEL AT ANY FUTURE TIME. FEES WILL BE RETAINED BY CCE AND WILL BE APPLIED TO THEIR FINAL PAYMENT AS A CREDIT.

When your client cancels you will need to make it absolutely clear to them verbally and in writing that we will not process their cancellation request until the agency cancellation fee is received by you or the CCE office. Other cancellation fees may apply, depending upon the time of cancellation, which is why selling travel insurance to cover various events is so useful.

When the supplier is paid by credit card, the client must pay their cancellation fee to CCE quickly to avoid slipping into the supplier fee window.

*For example:*

- a. The client paid deposit by credit card, and the vacation package goes into penalty phase on 11/15.
- b. They call 11/14 and say they want to cancel.
- c. The Independent Contractor advises they client must approve that the CCE Office charges the cancellation fee to their credit card or the client must send in the fee by PayPal. The fee is not received or approved until 11/17.
- d. The cancellation is then processed with the supplier.
- e. The client is informed that the supplier will now charge them their cancellation fee because they cancelled after 11/15.

A client may get upset because they think they informed us before penalty phase starts, so they want us to get



their fee back.

In a case like this, when time is of the essence, the client should be instructed to pay the fees online by credit card via Pay Pal (information below). The fees are paid immediately to CCE and you are then free to cancel their booking with the supplier, thus avoiding additional penalties. A credit card payment may also be processed through your ASC in the company office, when time permits.

Pay Pal payments can be made at: <https://www.paypal.com/xclick/business=payments%40cruisingco.com>

## ***Vendors who require UCC forms***

Rarely, a supplier requires a signed UCC (universal credit card) form to process a Credit Card transaction. CCE policy requires that the signed UCC form be in our office prior to releasing documents to clients. Please contact your ASC if you need a form.

## **Bon Voyage Gifts**

Any choice to send a client gift is that of the IC and the expense is solely that of the IC.

## **Forming a Corporation**

While this decision is between you, your attorney and your accountant, not all accountants know the travel industry and we want to share a few considerations with you.

Every IC with us has an active contract on file which was signed as an individual, not a corporation. If that is still your status, you can ignore the rest of this.

If you operate as a corporation of any type, C or S, or LLC, please read on, and please inform the CCE President.

If you are considering a change, please read on and consider this information in your decision:

Only individuals, not companies or corporations, can be covered under the CCE umbrella for two major items:

**1. Errors and Omissions / Professional liability insurance coverage.** This coverage is getting more costly and more restrictive every year. We share a very inexpensive rate with you, due to our excellent claims record and our systems designed to assure legal compliance. Your charge for Errors and Omissions coverage is built into the annual fees for contract renewal.

If you are an LLC or any other business corporation, you must secure your own insurance independently, with coverage equal to agency coverage levels, naming CCE as a named insured as well. For questions, contact your insurance agent and expect annual fees for just your company to be at a higher premium rate, depending on the level of coverage.

**2. Some states have Seller of Travel laws that will not cover anyone but individuals under our CCE registrations.** While it is not the only state with such a law, California's law is the most restrictive and most actively enforced. Below is an example of the requirements for selling travel to any person that resides in the state of California; other states may have the same regulations and anyone who is not an individual business entity would need to become compliant on a state by state basis.

The California Seller of Travel Law states that "All sellers of travel must register with the Attorney General's Office, Seller of Travel Program, before they can operate lawfully within the State of California or market to persons, businesses, or retail vendors located within the state." You would also be required to display your seller of travel registration number on all your advertising as our S.O.T. number would not cover you.

One cannot simply say I just will not sell to California residents. For one, there are many other states with similar rules as well as CA, and two, not selling to Californians is just an impossible business strategy. It is inevitable that a group or relative of someone you sell will have a participant from CA or another state.

To summarize, anyone operating as a LLC or corporation would have to research every state seller of travel law to be sure they were compliant, and demonstrate to CCE that they are compliant before we could allow an IC to continue to book under the CCE name. That process may require the legal services of a travel attorney. A letter from yourself or an attorney who is a travel industry specialist stipulating that you are compliant with state seller of travel laws country wide, plus a copy of your Errors and Omissions policy will need to be on file with our office to continue to selling with CCE.

Discuss this with your tax professional as you decide this issue, and consider that your coverage through CCE provides the necessary E & O insurance coverage. Think about if that isn't sufficient to protect you in the event of a lawsuit rather than having to spend all these extra legal fees, registration fees and insurance fees. Again, please contact the CCE President should you be considering incorporation to work out a timing plan to meet compliance.

## **Frequently Asked Tech Questions**

This section is devoted to help on most frequently asked Tech questions. It is our intent to answer all basic questions, and refer you on to your best resource if not. We will always provide full directions and assistance on CCE Email issues and CCE resource access, which this section is designed to cover. Please know that we cannot serve as a technical support resource for anyone's problems with their individual technical needs.

### ***General Computing Suggestions***

Allow Microsoft to update your computer whenever a notice is sent out. You can do this by changing your settings to "Auto Update" under "Windows Update." Also, as a general rule, allow other trusted software providers to update their software as well.

Don't allow too many programs to load at start-up. Many programs will try to auto-load at start-up, and most have options settings to disable that feature. Unless it is a program you need all day long, disable the auto-load feature.

If your Internet Browser starts to show signs of slowdowns in load times, you may want to see how many Browser Add-ons you have loading. That can be a major source of slow down. In general, to increase the speed of your computer, look into adding more RAM. This can be done very cheaply, and is a very quick way to gain speed.

### ***Computer Error Messages / Bounced Emails***

We are unable to help with computer error messages. Your best bet is to try and determine exactly what program you are using and what you are actually doing at the moment the error occurs. From that information, you may contact the distributor of that program for more assistance. If the error you are receiving is a bounce message in Outlook, please email that bounce message to [officesupport@cruisingco.com](mailto:officesupport@cruisingco.com).

### ***Forgotten Passwords***

For all password issues, please contact [officesupport@cruisingco.com](mailto:officesupport@cruisingco.com). We suggest you maintain a separate personal Excel "password file" to track all login IDs and passwords.

### ***Virus protection choices / alternatives***

With the proliferation of computer viruses, we require that all ICs have virus protection on their computers not only to protect themselves, but also to protect the agency and our clients. Some major virus protection companies are: AVG, McAfee or Symantec/Norton, Kaspersky.

You must purchase, at minimum, an anti-virus program for your computer if you do not already have one. You must allow the program to auto-update to stay current on new viruses that come out **every day**. It is up to you whether to purchase additional anti-spam or security software for email spam filtering.

### ***Use HTML Email & letter formatting***

Please send your emails with colors, pictures, etc. as it will be much more of an eye-catcher. We have HTML-

email templates for your quote requests, and we encourage you to use colors, bold, and photos tastefully so as to catch the eye of your clients.

## ***Training resources for Signature***

Signature provides many resources for ongoing training opportunities. All of these can be found by going to the SigNet and clicking on *Training*.

Under *Signature University*, you will find various resources, including reference guides, webinars and virtual training, video tutorials, information on all suppliers and destinations, and many other tools. Here you will also find information on various industry associations and events, including ASTA, CLIA, The Travel Institute and more.

The *Training Calendar* shows a comprehensive list of training opportunities and upcoming webinars, including monthly SigNet overviews and updates.

Under *Training News*, you will find additional highlighted training opportunities, including available Signature Educational Journeys, newest webinars, and industry news.

For individual supplier training, such as Princess' One Source Academy or Trafalgar's Specialist program, go to Suppliers > Cruise (or Land) Suppliers, and select "training" from the top olive-colored bar under the supplier name. This will bring you to the most updated training tools for that specific supplier.

## **Mailing Preferences**

Travel documents from suppliers are now predominately sent electronically. If a supplier is still sending paper documents, please advise the supplier when you make a booking deposit to send the documents directly to the client or, if you prefer, to your home office address.

Even with electronically documents, it is necessary to examine all documents carefully to ensure they are accurate and include all the components that you have arranged. An electronic packet may then be sent to clients along with a detailed itinerary, vouchers and other necessary travel instructions. Please prepare and add any tip sheets, destination information, packing lists, rebooking letter, and other documents in a professional format to be sent electronically to each client. Verify receipt of these important travel documents with your clients and take this opportunity to clarify any questions. Some agents prefer to print this information and send a mailed packet to clients via postal mail.

For those suppliers who send paper documents, be sure to verify all these same details with the supplier to ensure accuracy. If you are unclear whether the documents will be delivered electronically or by postal mail, please ask the supplier and verify the use of your personal office address or the client's mailing address. Some agents prefer to not provide the supplier booking departments a client's personal email address to avoid having a supplier try to directly book the client on a repeat vacation without using their travel consultant. You may list your CCE email address for the client instead.

The chart below indicates the different departments at Disney and their policy for sending paper documents. Be sure to note that you need to give the client's address or your home office address for DCL, DLR, and ABD bookings. When ordering Disney Magical Express Tickets, you will need to call 866-599-0951 and request shipping to a designated client address before final payment.

### **DCL, DLR & ABD:**

At time of deposit, ask to have documents sent to client or to agent's address

### **WDW:**

At this time, WDW sends documents to the Sumner address. If it is a last minute booking, request documents to be sent **overnight to the client or resort pick up** (or overnight to IC) by faxing a request with all information to 407-938-4115 – The fax needs to be sent before final payment is made.

### **Disney Magical Express Tickets**

When ordering Disney Magical Express Tickets, you will need to call 866-599-0951

**\*\*If you use the Disney Travel Agent's website to book, be sure you call in to give the correct mailing address for documents.**

WDW documents should be the only documents that come in to the office and will automatically be mailed First Class Mail to the IC unless the IC has enough to fill a Priority Mail Click & Ship pack (priority usually arrives in 2-3 business day, has free tracking & option to add insurance for a cost which is charged to the IC).

Please remember that once the documents leave the office, CCE cannot assume responsibility for replacement. You will have to work with the supplier to get them replaced, and if they have proof of delivery to the office, they will not do so for free.

Remember, we can certainly ship specific documents via a different method if they require a faster delivery. Please notify the office as soon as you can prior to the documents expected arrival at the office if you require a change, or they will be sent via regular 1<sup>st</sup> class mail. The IC will be charged the extra amount to mail them a different method.

## ***Late Documents***

When WDW travel documents are received very close to the travel date, the following procedure will be used:

1. The Independent Contractor should ask the supplier to send the documents directly to the clients or arrange resort pick.
2. The Independent Contractor directly E-mails or otherwise sends the itinerary and any other companion materials directly to the clients and verifies document handling with the supplier.
3. The Independent Contractor remains responsible for any extra shipping charges, but we suggest that you charge a \$10- \$15 rush fee at the time of booking a last minute booking, if it requires shipping fees you would not otherwise incur.

## **Missing and Late Paperwork/Data Entry**

Easy procedures exist that enable everyone to work efficiently. The online payment receipt is one example that saves everyone time and makes the process easier for the client.

As a reminder, the administrative fee is \$25 or more per reservation for transactions not reported within 24 hours of the transaction. Of course we are all human and a reasonable number of slip-ups will be overlooked before we will enforce this. Full details of the maximum number of exceptions and the actual range of fees are posted in # 3 below.

Also remember that our policy states that *exceptions for extraordinary circumstances will be taken into consideration*. Just let your ASC know if such a situation impacted your timing when you DO input it. For example, if you missed the 24 hour mark due to CB being down, pop your ASC an email the day you input them saying "CB was down last night, so Smith res# 124326, Jones res #98367 and Anderson res #64839 were are all input today".

A constant challenge for everyone is keeping on top of their paperwork. By inputting your data within the 24-hour period, you are complying with legal regulations as well as helping us save time and maintain proper financial records. The time we need this information most commonly is when a confirmation, client detail such as address, phone number, passenger name or DOB are necessary to obtain when an IC is traveling or unavailable. Not only is this data necessary for legal regulations, but also for handling emergency changes or a client in need – this happens many times. Our goal is to never charge these fees, so we will always send bi-monthly reminders. We appreciate your commitment to keeping your CB records updated! Unfortunately, because of those few who do not comply with the procedures, we have made the difficult decision to impose our service fees if we need to spend time contacting you for these items.

### **We would like to remind everyone to please adhere to the following simple requirements:**

**1. All client information must be entered into Client Base (CB).** As per the Client Base instructions, all pertinent information must be entered into a profile in CB. This includes family member (passenger) names, home address, phone numbers, E-mail, dates of birth and passport numbers (where applicable). Additional information such as credit cards, anniversaries, passport information, frequent flyer programs, and other family details improves your data base. Marketing preferences should be specific to each client as well as the No Touch Birthday, Anniversary and other communications. Create a Res Card for each vacation and consider this your organizational "file folder". Then each reservation for that vacation will have a Reservation within the Res Card. We recommend entering the Signature Offer number in a Reservation which allows Client Reach reminders to be sent to clients with interactive content regarding their vacation.

**2. Client's email acknowledging the invoice and payment receipt must be attached to the appropriate res card on CB.** Send the CB invoice to your client for each payment received by email, assuring compliance with all Legal Requirements. Each invoice states the amount paid, the total amount of the Vacation, balance due and due dates. The payment receipt email should be collected within 30 days after deposit and a notice is sent to you twice a month as a reminder to verify the client has replied. If the client's email acknowledging the invoice/payment receipt is not attached to the Res Card in CB when the documents are released or within 30 days after deposit or 2 weeks before travel, whichever comes first, the IC will be charged an extra service fee of \$25. Failure to provide a properly executed payment receipt and confirmation form from any client shall result in all liability for that transaction being borne solely by the IC. If you encounter a difficult time receiving a payment receipt from a client please let your ASC know in advance ~ a phone call to clients often explains how you need their approval on the form. If you would like some tips on organizing your booking files to never miss a deadline, please check the CCE/MEV agent LinkedIn files and use the CB Reminders system.

**3. All reservation details will be online in CB; Res sheets are no longer used or recommended.** The suppliers will send you emailed or faxed confirmations (see CB instructions on how to attach these with your CB records). ALL reservations must be entered in CB within the Vacation Res Card. Reservations with only a credit card hold (i.e. car rentals, some hotels, transfers, etc) must be input in CB, see the instructions on how to handle such invoices. ***A copy of the confirmation MUST be attached to each Reservation in the Res Card.***

**4. IC's will be responsible for generating client invoices in CB.** ICs must input new reservations with deposits into CB. By law in many states, the client must receive their invoice within 24 hours for each payment processed by a Travel Consultant. Additional payments and final invoices showing payments should also be sent to clients via E-Mail from CB. Adjust any Reservation totals or commissions should a price be adjusted. Should you have questions regarding a change, please contact your ASC in the Washington Office. **\*\*Please note the invoices have legal verbiage that must not be changed. Any changes could result in losing your umbrella of Errors & Omissions coverage and/or the company (CCE) would not be liable for your changes/mistakes.**

Once commissions are received by the office, they will verify the data against your CB entries. If any errors still remain, the following charges will apply:

- Multiple Invoices made for the same booking = \$50 each
- No reservation/invoice generated at all = \$50 + forfeit all commission
- Any error of any kind that results in not being able to match up your commission = forfeit all commission
- Invoices not being created within the legal requirement (one business day) of deposit:
  - First *two* per year: \$25 fee each
  - *Third* time onward: commission is forfeited on the sale
  - Thresholds for higher producing ICs:
    - 175-300 annual bookings: *Five*.
    - 301-400 annual bookings: *Ten*.
    - 401+ annual bookings: *Fifteen*.

*\*exceptions for extraordinary circumstances will be taken into consideration*

Fees will be deducted from your monthly Agent Statement or billed in the month of the occurrence.

## **Personal Websites and Advertising**

### ***CCE/MEV marketing benefits to our ICs:***

ICs are encouraged to make full use of the marketing potential of the CCE and MEV email, direct mail program and websites within their intended structure. This is a huge benefit to CCE ICs for which CCE invests a lot of money and time. Those resources are designed to be the sole marketing needed for your business, a big benefit provided to you by CCE.

We put in tremendous effort and expense to have this comprehensive and professional resource for you. We provide optional training in maximizing its benefits to you, and no other major marketing is needed. Feel free to ask questions about maximizing its potential for your business. Our objective is to provide a comprehensive

marketing resource as a benefit to you, so you can spend your work hours selling without having to develop a marketing plan yourself.

### ***Personal websites, marketing, and business or social networking:***

If an IC opts to have an independent site or do any other independent marketing, absolutely no part of the CCE or MEV sites may be used, copied or wording from same be used without express written permission from the President of CCE. Nor shall any of the following be used: the CCE registered seller of travel identifications, marketing materials prepared by CCE, CCE or MEV names, their CCE email address, marketing venues cultivated by CCE/MEV, or any other form of reference to the CCE/MEV company. IC assumes full liability for content of their personal advertising and/or sites, and the CCE professional liability insurance will not cover any problems whatsoever resulting from their personal marketing. Requests for said approval must be submitted annually. Certain materials may be provided to ICs for that purpose and may be used in your own marketing vehicles with the approval of the President of CCE. Said approval will include the agreement that no other agency will be included in such marketing. Any links, affiliations or referrals to other companies must be pre-approved by the President of CCE as well. Professional standards must always be maintained. CCE reserves the right to prohibit the use of our company name(s) and email address(es) at the sole discretion of the President of CCE.

All ICs included in the optional Leads Program are expressly prohibited from having their own personal websites, or from conducting any correspondence via any email address other than their CCE email address. Such Leads Program ICs with access to clients whose original derivation was from CCE and CCE marketing are limited in perpetuity to selling to them exclusively via CCE.

Any exceptions must be approved in writing by the President of CCE, and reaffirmed at the request of the IC for each calendar year. Any such approval will include the provision that within 5 days of the termination of the affiliation agreement between the company and IC, the site's URL and email addresses associated with that site or ever provided to company owned clients in any manner by the IC while an affiliate of the company must be eliminated with no forwarding functionality. The IC will be able to notify their personal clientele of the change to a new URL and email address. Violations of these rules shall incur a penalty of \$500 per client.

Agents may use social media links on all customized offers and campaigns through Signature Travel Network. This is limited to ICs who have opted to have a personal page that is *exclusively* devoted to their professional business interest. Please contact the Admin Team for more details and approval of such links.

**Social and professional networking websites** including but not limited to Facebook, Pinterest, Twitter, MySpace, LinkedIn, etc.: Should an IC also choose to participate in a social or professional networking site using their company email address, or to use their company email address in any activity on such a site, the posts by the IC must adhere to all rules and guidelines found in their CCE contract and the CCE policies section. Any activity in the name of the company affects the reputation of the company as well as that of the IC. Supplier advertising rules must be followed and professional standards must always be maintained. CCE reserves the right to prohibit the use of our company name(s) and email address(es) at the sole discretion of the company. Any page or site in which you use your company email address must include [adminteam@cruisingco.com](mailto:adminteam@cruisingco.com) as a friend or member of the group. If you choose to join one on which this email is not already included, please contact [adminteam@cruisingco.com](mailto:adminteam@cruisingco.com) for that address to be added before you join. If you are ever in doubt, please address your concerns to [adminteam@cruisingco.com](mailto:adminteam@cruisingco.com) before posting anything on the web. All such sites or pages, or other use of the company email address shall be eliminated upon termination of affiliation with the company. Violations of these rules shall be subject to a fine of \$500 per post or occurrence. ICs are encouraged to make the most of the marketing tools provided by CCE, including e-mailers, travel magazines, and our two professional websites. These proven tools are highly valuable for both marketing and for broadening your knowledge of travel destinations and suppliers.

## **IC Fees**

Annual renewal fee with Web Access, 12 months CB access and E&O Insurance is \$355, non-refundable. Annual renewal fee with Web Access, Personalized Websites, Yearly Website Maintenance, 12 months CB access and E&O Insurance is \$465, as a non-refundable discounted package bundle. This includes liability coverage for CCE transactions as an Independent Contractor. The basic level is available to all ICs and

includes a professional CCE e-mail address. Additional benefits of proprietary nature are available to ICs who sell exclusively for CCE, including but not limited to all the benefits of our site, suppliers, affiliations, training, communication tools, and free email marketing to your clients.

Your own business development skills and success with your own mailing list, on which advanced training is offered but not required, is fundamental to your success. IC's who demonstrate advanced levels of expertise may be invited to receive CCE generated leads.

There is an expectation that all ICs will build their business and increase travel sales each quarter following initial training. In the event that an IC fails to meet this expectation, CCE will offer intervention and coaching assistance. Should the IC not comply with best practices and intervention tactics, the IC may forfeit TA rate travel benefits. The administrative team will review best practices with the IC designed to improve sales performance and may offer additional assistance as needed. In the event it is determined that continued assistance is inadvisable, affiliation may be terminated. In no case are pre-paid fees refundable.

## Rebating

The travel industry is becoming more and more competitive every day and unfortunately some agencies have stooped to the level of rebating their commission to close a sale. We do not recommend rebating, and suppliers penalize agencies who do rebate. As professionals, we earn our commission by offering superior service to our clients as compared to many of the cut rate agencies. Many of us have been faced with situations where one of our best clients came to us saying another agency has it \$50 cheaper and we need to match it in order to keep their business.

Obviously we don't want to get caught in the vicious circle and rebate our hard earned money away. Nothing prevents you seeking a price match, or finding a better price.

Ideas on price matching are as follows:

1. Follow the "Best Price Checklist" and be sure you have checked every possibility for a lower price or special with Signature Travel Network. Check a few weeks before and after their specified date to see if you can find a better offer to propose.
2. Check with the supplier for any offers they may not have provided when you first called. Every supplier has several promotions running at the same time, and it's possible the representative you spoke with didn't look far enough.
3. Don't forget the possibility of working out a lower price by setting up a group and using points to lower the price. Each cruise line has its own system for this and it is a widespread practice these days. All of our vendors will back us up if we do not sell more than that one or two cabins, as long as we make a bona fide effort- and we will do so. Note: price will be protected but extra amenities remain contingent on a minimum number of cabins being sold.

If you are unable to find a legitimate lower rate to match the competitor's quote, it is possible that:

- a) the competitor is rebating part of their commission
- b) the competitor has group space which they took a while back, and prices have gone up since then.
- c) the customer may be pushing you with a "challenge" that is not true

At this point a savvy salesperson will focus on the extra value of the outstanding service they provide. Sell yourself! In many cases, rebating agencies provide nothing but a ticket in the mail. What you do for your customer is top of the line - let them know it!

If after all this, you would like to offer a credit incentive to your client for booking with you, you always have the option to provide it after the travel has been completed. CCE will not participate. You may provide savings in the form of an onboard credit, limousine transfers, or other gift.

In the rare case there is a price matching situation that you expect the company to share in, you must always receive pre-approval in writing from the company President before committing to the client.



## Tour Conductor Program

The IC and/or group leader is entitled to the Tour Conductor, Bonus Commission, or Free Spaces earned in group bookings, provided the IC has individually sold the required amount of cabins necessary to earn a Tour Conductor, Bonus Commission, or Free Space. If the group was deposited by the agency, the IC will be entitled to the prorated TC's or Bonus Commission, at their usual commission split.

IC and/or their group leaders shall be entitled to Tour Conductor, Bonus Commission, or Free Berth or other Free Spaces, bonus commissions, and/or other amenities, provided the specified number of full fare passengers are booked by the IC, and he/she is fully responsible for all related matters to the travel during the tour and/or cruise and/or ancillary travel. Any year end overrides are excluded. The free berth is not transferable. The IC shall be entitled to 100% of the value of earned TC or Bonus Commission if individually the IC booked the qualifying number of passengers, and the qualifying number complete travel. This applies to booking a qualified number of passengers into a Signature Travel Network group.

Any IC who travels within a group and assumes responsibility and hosting duties of that particular group is entitled to the full Tour Conductor value or will split with any other IC traveling in the same role. Any IC who is joining a group organized and hosted by another IC defers the TC to the IC who organizes and assumes the hosting duties, unless specifically requested to join in hosting duties and specifically offered a part of the TC. If the group becomes large enough to fully pay the host's expenses and any special guest expenses planned for the customers, any remaining TC value and/or bonus commission will be prorated among booking ICs if they sold enough to earn a full TC on their bookings. Any IC who does not travel defers their Tour Conductor share to a traveling IC performing host duties. To be claimed, the group will need to be paid in full and the TC and/or bonus commission will be distributed to the IC or the client after CCE has received the commission payment after travel.

Examples: Cruise Line offers a TC for each 8 cabins sold.

- If Agent A sells 8 cabins, and Agent B sells 2 cabins. Agent A gets 100% of the TC.
- If Agent A sells 8 cabins, and Agent B sells 8 cabins, both agents get TC's.
- If Agent A sells 4 cabins, and Agent B sells 4 cabins, neither agent gets the TC (neither one sold 8 cabins on their own).

Waivers, special allowances, and/or unique considerations for CCE group space shall be approved in advance and in writing by the President.

## “What to do if I get a request for a non-preferred supplier?”

Sometimes, you will encounter requests from clients for suppliers that are not listed in our Supplier Guidelines. Here is the procedure you should follow to make sure you and your clients are protected. It is imperative that the supplier may be trusted to provide a quality vacation experience that is insurable and dependable.

**FIRST** - Check to see if the Supplier Guidelines document has a recommended partner to the same destination already that you know you could trust. If so, try and convert the client to use the known supplier.

### ***If that fails:***

1. Ask the new supplier if they are USTOA bonded to protect the clients.
2. Check with the Better Business Bureau online in the new supplier's home office's city to be sure they have a clean record.
3. Ask our preferred trip insurance provider if they will insure them (another indicator of a clean record PLUS independent protection of your client's funds). Travelex provides a list of companies on their website that they DO NOT insure. You must contact Travelex to enquire if the new supplier is eligible to be covered.
4. Ask if anyone has experience with them on the Signature message board - another agency may have information on the new supplier. Remember not ALL of the Signature Suppliers are approved for use with our company. Some of these suppliers have terms and conditions that are not acceptable.

After all that, we will verify the supplier's terms and conditions and if they are okay, you will see a clear path in most cases. If they look safe and that is what the client wants, we can do it 99.9% of the time just with our IATA number. Ask your ASC if there is any further requirements necessary to book with the new supplier.

## IC Hiring Tips & Suggestions

So you have reached the crossroads where you either turn away new business, or get some help so that you can continue to prosper? First, CONGRATULATIONS! Next, let us share some tips on how to proceed. There are two levels of support that we have seen of use for ICs. Please note the important differences:

An **administrative support person** is defined as a person who supports an IC with any paperwork, Client Base work, marketing or other work requested by the IC to support the IC's sales efforts. The IC is expected to take full responsibility for the work product of that person and look over any work product before it is considered final, i.e.; invoices before they are sent to the clients. The admin support person never represents the company to anyone, including clients or suppliers, so Errors and Omissions coverage is not required for this person.

A secondary level, and one to which you may aspire, would be a **full assistant**. An assistant would receive appropriate training by the IC on CCE procedures and policies, and upon satisfactory completion of that training be deemed eligible for contact with personal clients of the IC and with travel suppliers. The IC is expected to always be the primary contact to any CCE owned clients. The assistant, for example, may then be eligible to make actual reservations, dining and other reservation details in the name of the IC and the company, and the assistant may be permitted direct contact with the IC's personal clients. The company will support the IC in the training of the assistant with company training resources, and upon completion will decide how to handle the E and O insurance required for the assistant, depending on the company's perception of the qualifications of the assistant after training. If it is deemed appropriate, the company will offer to bring in the assistant under the existing company E and O insurance policy at the attendant reduced costs afforded by that step. If the IC believes the assistant to be qualified for addition to the CCE E and O policy and the company disagrees, the company reserves the right to decline providing a policy for the assistant. Upon CCE's authorization of the assistant's use of CCE's resources and the representation by the assistant as being a representative of the IC's affiliation with the company, an addendum of the IC's contract will be executed noting the terms of that agreement. As stated in your contract, the responsibility for hiring either position, including their compensation, is the sole responsibility of the IC. Consult your accountant for appropriate payroll tax considerations and how to handle your tax deductions. Do remember the importance of confidentiality regarding your client list when someone else is accessing it, particularly if the helper is doing work for more than one agent. You may wish to execute a confidentiality agreement with them.

### Tips on maximizing the use of your admin support person:

1. Everyone's first thought: handling all Client Base work.
  - a. this can start with client profiles
  - b. invoicing, which you would always review for accuracy, and could be expanded to include c. enhancing marketing preferences
  - d. posting notes on each client contact
  - e. undertaking marketing initiatives (new itinerary announcements, etc.)
  - f. itinerary documents written up for your review before sending
  - g. agents have taken different approaches here and we can always set up an informal cross talk session looking at opportunities to save your valuable time for selling!
2. Help you enrich and maintain your MyTravel Site, and send announcements of updates to your client base
3. Help you enrich and maintain your marketing via social networking, including your professional Facebook site.
4. Assist in the preparation of your trip reports for CCE and social media sales efforts. Organize and post your trip photos.
5. Mail merge your personalized notes to clients a few times a year. Include reference to your updated social media sites!
6. Client travel document review, sending docs with any additional items you wish to include.
7. We have seen this work out nicely from remote offices. There is no reason that they must necessarily be in your office.

As your business continues to grow, you may find yourself considering the full assistant role. Contact your Admin Team at that time and we'll discuss some ideas with you to help.

# COMPANY COMMUNICATIONS

## IC Communication Requirements

**Business Phone** A phone with answering machine or voice mail is required and must be answered with a professional greeting 100% of the time, no exceptions. Phone messages must be checked daily and when traveling, ICs must follow the travel guidelines policy for back up coverage for client contacts. Ask your phone company about a second line with your existing home line; this is sometimes available as "distinctive ringing" and available at a reduced rate. It does not need to be considered a business line, which has a higher rate. If you use the same home telephone line, it must have a distinctive ring so that it is ALWAYS and ONLY answered professionally when it is a business call. If you use the distinctive ring option, your outgoing message must be professional and not include a personal family message.

\*It is an option to have the business phone line listed in the phone book as "Affiliated with CruisingCo.com". We do not recommend an ad larger than a bold listing in the yellow pages.\*

**Toll free number:** This is required and must be good nationally for clients to call. This phone line and answering machine must also be answered with a professional message at all times. Suggestion: price out your local phone company, ATT, Telcan.com, Sprint, WorldCom, PowerNetGlobal (pngcom.com). This is surprisingly inexpensive, and can ring into your business line with no need for an extra line.

**Professional Communication:** Client calls must be handled professionally from home offices without distractions (i.e. family interruptions, children, unprofessional home noises such as loud music, TV programs, barking dogs, etc.) Remember you are to present yourself as a professional travel IC at all times as you communicate with your clients and travel suppliers.

The presentation of a professional home office requires all of your communications be consistent and proper. Having a family member answer the telephone with "hello" or an outgoing message that does not follow company guidelines is not acceptable. Please read through the sample messages for assistance.

**Daily Communication Monitoring:** Phone messages and emails need to be monitored daily and responded to in a timely and professional manner. Please ensure you follow these guidelines and properly arrange back up when you travel or are unavailable.

**PC with Internet Access:** Microsoft Outlook, Microsoft Word, Excel programs, Adobe Acrobat Reader. All software must be up to date and compatible with supplier websites and Client Base. Cost of software updates will be the responsibility of each IC. A paid virus protection is required, (i.e., AVG, Norton or McAfee, Kaspersky). High speed internet access is especially recommended. Microsoft Outlook Express is not compatible, Macintosh may be incompatible.

**Email Accounts:** Professional email accounts are provided for each IC through Smarter Mail, which syncs to your Microsoft Outlook. ICs must set up their home office computer's software to retrieve all messages from the server and check email messages daily. The professional CruisingCo.com email address must be used for all business correspondence. Messages may NOT be left online as each Smarter Mail account has limited space.

**Email Signature:** All ICs must use the approved format for email signatures. All business emails must include this approved signature.

**Fax machine or Electronic Fax:** Agents need to be able to send and receive faxes but are not required to have a dedicated fax phone line. If you have a document you need faxed and do not have a fax machine, you need to be prepared to send the fax professionally and in a timely manner. Using an office store for that occasional need or using EFAX or JFAX may be an inexpensive or free alternative to an additional line of service. An EFAX is a number that others use just like a fax machine number and faxes are sent to your email account (www.efax.com or www.jconnect.com or Google "EFAX"). Many of these options have free trial periods to try e-fax programs. You may scan documents to be faxed, which does have a fee.

***Business cards:*** Business card templates are provided to all ICs and must be professionally printed at your local printer. See the file library for instructions to submit for personalized business card templates. Letterhead and envelope templates are provided in the forms library for ICs to download and personalize. The letterhead and envelopes may be printed from home office printers. Envelopes or labels must be printed and appear professional for all client and business correspondence.

ICs who are part of the MEV Leads team have additional requirements outlined in the Leads Program policies. These guidelines are part of the IC contract and failure to comply with these standards is considered a breach of contract.

## ***CCE Professional Greeting & Voicemail Greeting***

### **CruisingCo Professional Greeting:**

ALL phone calls must be answered professionally 100% of the time and only answered by the contracted IC. Sample message: "CruisingCo and MouseEarVacations, this is John speaking." All family members should be advised that this is your professional business phone line and to let messages go to voice mail should you not be available to answer the phone yourself. Please note guidelines regarding IC Communication Requirements.

### **CruisingCo Voicemail:**

Your outgoing personal message (voicemail message) should reflect the personal and professional attitude that you always share with your clients. Please refer to the following examples when setting up your voicemail outgoing messages:

### **General Message:**

*"Hi, you have reached the office of (John Smith) with CruisingCo.com and MouseEarVacations.com. I am unable to take your call at this time. Please leave your name, telephone, and a brief message and I will return your call just as soon as I can. Thanks and have a great day!"*

## ***Vacation / Traveling***

As you know, clients don't stop needing your personal service when you travel for business or for pleasure. We pride ourselves on a level of customer service that requires extra effort on our part. This ensures their questions are answered and their needs are handled even when you are unavailable.

There are several steps you need to take when you are planning to be out of your office to ensure your clients are taken care of promptly.

- Send an email to your ASC and AdminTeam@CruisingCo.com to let us know the dates of your travels, and who will be taking any urgent issues in your absence. Please advise us at least 14 days prior to your departure.
- Partner with another IC. When you travel, strike up a partnership with another CCE/MEV IC who will agree to help with any emergency issues that might come up for your clients. When they travel you can repay the favor by assisting with their clients. Remember, your ASC is there for you for the occasional brief back up need, but cannot do justice to the standards of customer care we all want to provide when they are already handling their pre-existing full time responsibilities on behalf of all the ICs. \* Important note: If you are a Disney Specialist, please use another IC who is a highly qualified and trained Disney Specialist as your back up for your MEV clients.
- **Vacation Message:**  
*"You have reached (John Smith) at the CruisingCo.com and MouseEarVacations.com. I am currently out of the office and will return on (Monday, October 15th). Please leave a message and I will return your call as soon as I return. If your travel interests cannot wait until my return, please call (your backup's name) at (800-555-1212). He/She will be able to help you or will know how to reach me. Thank you and have a wonderful day!"*
- **Vacation Email Auto-Responder Message & SmarterMail Email Signature:**  
*"I am currently out of the office and will return on (Monday, October 15th). I will reply to your email as soon as I return. If your travel needs cannot wait until my return, you may contact (your backup's name) at*

[SuzieQ@Cruisingco.com](mailto:SuzieQ@Cruisingco.com) or phone (Suzie) toll free (800-555-1212). She will be able to help you or will know how to reach me."

- (Log into SmarterMail, Select Settings, then Auto Responder, Enable Auto-Responder, check all three boxes:
- Enable auto-responder
- Disable responses to indirect mail
- Limit responses to once daily
- Next, open the Auto-Responder tab and enter your message, be sure to click "Save". Be sure to disable your Auto-Responder upon your return.
- Copy and paste your e-mail signature into your SmarterMail account. (Log into SmarterMail, Select Settings, then My Settings, then Compose, Then paste your approved signature into the "Signature Box",
- be sure to click "Save".

Be sure to let your back-up agent know where and how to reach you in case there is a situation that requires your immediate attention. Hotel numbers, email addresses on the ships, cell phone, etc. You may wish to email pertinent files to your back-up agent for clients who are travelling or actively needing assistance.

Be sure to discuss and agree how any bookings will be handled before you leave. For example, will you split commission, if so, how much? Will the client remain the client of the traveler or the covering IC?

These simple steps will go a long way to increase your comfort level when the unexpected happens and you are away from your desk for a few days.

## ***CCE Facebook Admin Team Group Communications***

ICs receive important marketing and administrative communications via the CruisingCo.com Facebook Group. Your messages will arrive in your CruisingCo.com mailbox from a business Yahoo account set up for this purpose. Replies to these messages are sent only to the administrator who posts the messages.

## ***CCE Communication Flow***

First, ***always*** make sure you have done the basic research.

Ask yourself before you post on Linked In, e-mail or call, or use Facebook (FB) Messenger:

- ✓ Have I used the Supplier Guidelines to determine my best resources?
- ✓ Have I called the supplier and asked them for this information? (including specific resort questions)
- ✓ Have I searched SigNet for this information?
- ✓ Have I searched prior LinkedIn posts?
- ✓ Have I searched the Signature Message Boards?
- ✓ Have I done a reasonable Internet search for information?

If the answer to any of these is No, please complete initial searches. Chances are you will get the correct answer faster.

### **When to e-mail or call an Admin Team Member:**

The Admin team is here to support you - all of you. If you email the wrong team member don't worry, we will help you to reach the correct person! We normally respond as quickly as possible, but if you have not received a response within 24 - 48 hours it is appropriate to follow up.

Examples:

You need assistance on how to start researching a booking (new destination or supplier)

You need coaching on adding components to a cruise, resort or tour reservation

You have a booking issue to resolve

Sample Supplier Issues

You've talked to the supplier at length. You've done basic searches. *Always ask yourself before hitting send:*

- ✓ Have I done the basic research in the list above?

The admin team member is probably going to ask you about the items on the basic research list if you don't include them in your email.

- ✓ Did I fully summarize the issue/question in my email?

Attempt to avoid lost time by making sure you have included all critical information in a coherent manner so the admin team member does not have to ask you a number of questions before they can answer your question.

- ✓ Do I **need** an answer within 24 hours?

If yes, consider Facebook Messenger or the phone as that will be more efficient, plus we like to talk with you!

### **Emergency Assistance Calls to an Admin Team Member:**

You need an answer ASAP. Examples:

Last minute bookings (after fully qualifying client is seriously buying)

Client in transit with urgent situation: please call, text so we can help right away

Note: If outside business hours, leave a message and try alternative team member

### **When to Post on LinkedIn:**

LinkedIn is searchable and meant to be a base of knowledge for our company. Please post items here that are appropriate for feedback from or will assist in building knowledge among all consultants.

*Always ask yourself before posting:*

- ✓ Do I **need** an answer within 24 hours? If yes, LinkedIn probably isn't the appropriate forum.
- ✓ Is my post professionally written?
- ✓ Did I give all necessary information?
- ✓ Did I confirm the accuracy of the information?

Please make sure you provide as much information as possible. When looking for recommendations for a specific client, try to include basic demographic information and budget information.

### **When to Use FB Messenger (FB Chat):**

When you need a quick reply or have a short question.

Examples:

Quick questions on bookings, CB, log-ins/passwords or marketing  
Quick clarifications on suppliers  
Questions in response to Admin Team emails  
Questions during or about webinars, conference calls, or meetings  
Quick IC to IC questions

## ***Email Account Requirements and Guidelines***

### **Requirements:**

- All ICs are provided an email account through Smarter Mail.
- All ICs must check their email accounts daily.
- All IC emails must be composed using the provided professional CruisingCo.com email account and include an approved signature. Signatures must comply with the template that is used company wide.
- When traveling, all ICs must follow the guidelines for back up coverage of emails and phone messages.

## ***Email Signature Requirements and Guidelines***

**Email Signature** ~ Please use our approved email signature for all business communication emails.

Your template may be obtained from [OfficeSupport@CruisingCo.com](mailto:OfficeSupport@CruisingCo.com). A sample template is below, enter your phone numbers, then cut and paste it into Microsoft Outlook, keeping all formatting as provided.

While in Outlook you open the "Tools" Menu, select "Options", select "Mail Format", under "Signature" click the Signature Box, then click to "New" to add a signature. Copy and paste the exact signature below (after you have entered your phone numbers). Use the same size fonts we are providing, please. Next select your [cruisingco.com](mailto:cruisingco.com) email address to include with new, forward and reply messages. HTML formatting works best; using "plain text" as your default prompt will remove formatting and most of your clients use HTML so

your quotes and letters will look more professional in HTML formatting. Example of professional email address:

*Agent First & Last Name*

Agent First & Last name

Affiliated with CruisingCo.com and MouseEarVacations.com

AgentEmail@CruisingCo.com

Personal Office: Cell or Mobile:

*Keep in touch with the latest Disney news and join in the fun!*

[MouseEarVacations Facebook](#)

[MouseEars Fun Twitter](#)

After you have tested your account, please send an email to at [OfficeSupport@CruisingCo.com](mailto:OfficeSupport@CruisingCo.com) from your business account showing your new email signature once you are sure that everything works properly. You may also copy and paste your email signature into your SmarterMail account online. Your

SmarterMail account also has an out of the office auto reply function where you could list dates you are traveling and the back-up IC for clients to contact.

## ***LinkedIn Registration***

Please refer to the PROCEDURES file (also in the CCE Forms Library) for instructions on how to access LinkedIn.

**Before posting a topic, search to see if anyone else has posted the same question or comment.** The admin team reserves the right to ask any IC to edit or delete a post that goes against the spirit of our message board. If the IC does not take care of it themselves, the admin team may edit or delete the post. Accounts with LinkedIn are managed and provided as part of the contractual relationship with Independent Contractors in good standing and will be deleted by management when a contract is terminated or may be deleted if an IC is not in good standing.

## ***Use of Email and other Company Communication Tools***

Emails and other CCE communications accounts have been provided for your use. These are to be used exclusively for CCE business. Please do not adjust any settings or use these for personal communications or subscriptions. All IC's are provided a Cruising Co email address, access to the CCE and MEV websites for your clients, CB, and IC telephone access to suppliers.

The following extra privileges are limited to those ICs who choose to have exclusive affiliation with Cruising Co: Signature Travel Network resources, marketing to the IC's clients, advanced training, peer group training, all agency communication systems, booking engine access, FAM trips, IC educational programs under the name of CCE, the CCE Intranet and access to the CCE Agent LinkedIn Group and Face Book exclusive group and FB Messenger with other ICs. Exclusive affiliation with Cruising Co provides ICs the CCE's rates, supplier specials and preferred commission levels.

As specified in the contract, any IC may have multiple affiliations. ICs must notify us in writing of any additional affiliation. Failure to advise CCE of any additional affiliation within 24 hours of the establishment of that affiliation, or use of the CCE tools for sales outside CCE, or for contact with clients regarding business solicited and/or sold outside CCE shall be subject to a fine of \$500 per incident, under the terms of your contract.

All words or images stored or transmitted via the CCE System is the sole property of CCE, and CCE may access, audit, or monitor those words or images at any time. You waive any expectation of privacy with respect to anything you create, store, send, or receive in connection with your use of the System, including but not limited to e-mail(s). Information obtained in the course of such access, auditing, and monitoring of the System may be used or disclosed by CCE, at its sole discretion or election, and provided to third parties to comply with laws, regulations, court orders, subpoenas, or other governmental procedures without notice to you.

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# TRAVEL BENEFITS

## *IATAN Cards*

*One of our most Frequently Asked Questions!*

We are a full-fledged IATAN member agency. Upon signing a contract with CCE, every IC's name is put on the official CCE register with IATAN, provided the Independent Contractor meets all the legal requirements of IATAN.

To issue a personal IATA card, IATAN requires the following: an Independent Contractor is required to have been on the list for a 6 month waiting period, or to have been on a previous agency's IATA list prior to coming to CCE, and that total length of IATA list time must exceed 6 months. Once the time criteria is satisfied, they then must have received \$5,000, or the then current IATAN goal in earnings in the form of paid sales commissions within the prior 12 month period. This can include sales commission from their former agency.

This is the amount of commission paid to them, not just booked, and IATA requires us to prove that via a copy of your IRS 1099 form. If mid-year, we would be subject to audit, which requires us to provide a copy of your commission pay records for the previous 12 months. Renewals are subject to the same sales level performance.

To check your status for IATAN's eligibility, add up your last 12 months' sales commission, before marketing expenses, as listed on the check stubs which accompany your checks from CCE. If the total sales commission you received in the 12 month period exceeds \$5,000, you are set! Just pop an E-mail to your ASC requesting that she set you up and we will provide you with everything you need. (In the future IATAN may raise earnings requirements, and if it does, then you must legally qualify to continue eligibility.)

## *Independent Contractor Travel Benefits*

Any Independent Contractor who has sold 5 or more client cruise and /or vacation packages\* in their first 12 months with the company, or 12 per current calendar year thereafter (regardless of travel date) qualifies for themselves, spouse and dependent children to travel at net cost for any cruise or vacation package. Other companions (friends/family members including adult children) will pay regular supplier rates with the normal agency split for the commission. Preexisting bookings (i.e. prior to joining CCE as an IC) are ineligible for agent benefits or transfer.

\*The required number of trips booked cannot include any personal trips or trips sold to family members. Please see your Independent Contractor Agreement for further detail.

After 5 or more cruises or vacation packages sold to non-family members in the first 12 months with the company, 12 or more per year thereafter:

1. IC will also be eligible to receive travel special rates for travel (FAM trips which are available but not required), subject to the policies established by the various suppliers. This generally includes all cruise lines, and many other suppliers.
2. You are also eligible for an IATAN card, which will allow you to travel on special discounts provided by those suppliers, who require an IATA card for their reduced rate program. As of today, IATAN rules require that you must maintain total commission earnings of \$5000 or more per calendar year to earn and then renew your IATAN card. All computations for commissions earned are based on OSR payments made to you monthly, which then are what is reflected on your annual 1099 tax form. It is this method of computation which is used for eligibility for all travel opportunities revenue achieved.
3. IC's are responsible for entering personal trips in CB when booked, exactly like a client booking. This is regardless of booking your trip with a FAM rate or not, and includes training opportunities. This is a requirement of your liability insurance and a condition of your collecting the commission. Failure to do so results in the same service charges by the company as would be applied to a consumer booking that was not properly posted.
4. ICs who sell Disney are required to send in travel tips/articles (see below). Any future FAM or commissionable travel plans will be put on hold until all tips are turned in and approved.

5. CCE Trip reports are required after traveling on a FAM rate or commissionable fare. Any future FAM or commissionable travel plans will be put on hold until all articles are turned in and approved.
- ◆ All agents who sell Disney are required to submit 2 articles, 2 times a year = total of 4 articles per year due: May 1, November 1
  - ◆ Agents on Leads & Overflow would be required to submit 3 articles, 2 times a year = total of 6 articles per year due: May 1, November 1
    - ✓ We would like helpful information, tips that are not on the internet, but part of your unique experiences with the Disney products.
    - ✓ 3-4 paragraphs each that focus on a particular Disney product.
    - ✓ Written in word, emailed in word.
    - ✓ One per document sent
    - ✓ Titles for Each Tips- unique please
    - ✓ Your name on the document
    - ✓ Have fun with it!
  - ◆ ICs traveling to a non-Disney destination: If you travel for leisure to a non-Disney destination on a travel agent rate, receive commission or for a FAM/education trip, we ask that you submit either:
    1. Trip report -- Trip reports should be 1 to 2 pages in length with several photos of the product and your adventure. The Trip Report Template is located on the CCE File Library. Please also include your name, the destination, and the name of the ship or resort in the title. Examples of accepted trip reports may be found in the file library.
    2. Preferred: Two articles on some aspect of that experience (destination, cruise line, ship experience, shore excursion) or general travel tips; three or four paragraphs showcasing something of interest to our clients showing your expertise and enthusiasm.
- Please send either your trip report or articles within 3 weeks of returning!

Of course, we cannot use *all* the articles, but will try to use at least a few from each agent, and the extras will give us a "cushion" in case we need to cover a specific topic, or have the opportunity to send more than one tip in any given week. Please know that IC tips and trip reports are subject to editing by the Admin Team prior to publication. Combine this with your own individual marketing efforts and you have a great plan of attack! Mark your calendars today for the appropriate due dates and be sure to submit your articles to: [officesupport@cruisingco.com](mailto:officesupport@cruisingco.com).

## ***Disney Travel Agent Rate / Free Ticket Request***

As a top Authorized Disney Vacation Planner Travel Agency we qualify for an allotment of complimentary WDW one day or discounted multi-day tickets for consultants who have completed College of Disney Knowledge courses yearly. Other tickets for visiting parks are used for agent trainings. For questions regarding how to order your free WDW or discounted tickets, contact [AdminTeam@CruisingCo.com](mailto:AdminTeam@CruisingCo.com).

Tickets used for trainings are managed by the Admin Team. If you are training at WDW or DLR and wish to enquire about a training ticket, email [AdminTeam@CruisingCo.com](mailto:AdminTeam@CruisingCo.com) to discuss your training opportunity.

You must be qualified with enough sales to have an IATAN card; anyone with insufficient sales does not qualify. Complimentary admissions are not combinable with discounted travel agent admissions during the same travel period.

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## **OTHER INFORMATION**

### ***Affiliate Referral Program***

Up to \$1,000 COMPENSATION FOR NEW AGENT REFERRALS: You can earn 20% of the gross commissions of the new IC's sales made in their first twelve months with CCE, up to \$1,000 to you! The additional commission payment will come out of the agency share, of course. The sponsoring IC will be expected to specifically recruit and then help support and mentor the new IC. The twelve months commence on the date of contract signature, include sales that are booked within 12 months of the contract date, sales

will be tracked by the monthly Agent Statement forms for that IC, and payments are made after the clients travel. If interested, please contact [AdminTeam@Cruisingco.com](mailto:AdminTeam@Cruisingco.com).

## ***CB Client Profiles***

Please remember, all clients must have a Leisure Profile and Res Card created in CB (Client Base). For instructions on how to create profiles, res cards, reservations, etc. please refer to the CB Instructions posted in the Forms Library.

## ***CCE & MEV Logo Merchandise***

Please contact your ASC for inquiries regarding CCE and MEV Logo merchandise.

## ***Florida Seller of Travel Regulations***

Any IC who sells to a resident of Florida must take steps to personally register with the state. CCE has been registered under their rules as an agency for years, and you therefore qualify for the lesser of the two options from which you must choose. Remember, this is not necessary if you do not sell to Florida residents. It is each IC's responsibility to act on this registration requirement, and to do so annually.

CCE's Florida seller of travel registrations number is ST38358

1. Our agency registration qualifies you for this option if you meet all of the listed criteria: Exemption Requirements-Selling under the CCE Host umbrella Registration on individual sales to a Florida resident:

- Act in compliance with the Florida Registered Sellers of Travel Statutes, meaning they do not sell directly or through any other Host agency;
- Have a written contract between Host and IC;
- Do not receive a fee, commission or other valuable consideration directly from the purchasers of travel or travel related services;
- IC does not at any time have any un-issued ticket stock in his/her possession (this refers to airline ticket stock); and
- Does not have the ability to issue tickets, lodging or vacation certificates, or any other travel documents. (According to Tina Robinson of the Florida Department of Agriculture and Consumer Services Division of Consumer Services (850) 410-3845, as long as the Host agency is the -actual issuer of the ticket, then an IC would meet this requirement.)

If the IC meets the above requirements, he/she must complete and sign the Sellers of Travel Independent Sales Agents Statement of Exemption.

Download the form from <http://www.doacs.state.fl.us/onestop/forms/10211.pdf>, provide a copy of the executed Independent Contractor Agreement, and pay an annual fee of \$50 to fulfill the filing requirements.

**2. Independent contractors who are unable to attest to the above must register independently with the State of Florida as a Seller of Travel and pay an annual registration fee of \$300.**

Please remember, only those independent contractors (ICs) who sell to Florida consumers must fulfill one of these two requirements. It is the IC's responsibility to do so. Florida is the only state with such a requirement currently. We will keep you abreast of any changes.

## ***ICs selling travel outside of CCE***

CCE fully acknowledges that any IC may sell travel products through other agencies. In such a situation the IC remains welcome to sell travel through CCE as well, but loses permission to use proprietary CCE/MEV resources, including but not limited to, marketing materials, CCE/MEV websites, direct mail program, social media and other marketing tools. An IC selling travel products through another agency shall continue solely with access to E-Mail, CCE Website and telephone access to suppliers. Access to Signature Travel Network, all company communication systems, supplier booking engines, personalized websites, and all professional social media pages shall be discontinued.

This includes the use of any part of the CCE/MEV resources, their CCE email address, sites or marketing fliers for any purpose except CCE sales. No copy or wording from same may be used in any form outside of a CCE

produced marketing product. Nor shall any of the following be used: the CCE registered seller of travel identifications, marketing materials prepared by CCE, CCE/MEV names, letterhead, fliers or any other form of reference to the CCE/MEV company unless being used in a sale being processed through CCE.

Use of any and all email addresses, IM addresses and phone numbers associated with their CCE/MEV business at any time must be discontinued upon departure from CCE/MEV, or upon the formation of an affiliation with another agency. Affiliation with another company must be reported in writing to their ASC within 24 hours of formalization; failure to do so shall result in a fine of \$1,000 or damages demonstrated in court, whichever is greater. If necessary and at the discretion of CCE/MEV, CCE may provide IC with an alternative Email and IM account for the duration of their affiliation with CCE/MEV. Please refer to your IC agreement for additional information.

Effective 12/1/08, any violations of this agreement are subject to a \$500 fine per incident. IC assumes full liability for content of their personal advertising and/or sites, and the CCE professional liability insurance will not cover any problems whatsoever resulting from their personal marketing or non CCE sales. IC will also be ineligible for participation in the IC leads program or continuing to work with any company owned clients. Bookings originating from company owned clients as defined in the attached Schedule C shall revert to Company to be handled by a CCE qualified independent contractor selected by Company, with a 50/50 split of the net agent's share of commission between the departed Independent Contractor who made the booking and the active Independent Contractor who completed the booking duties.

## ***Setting up Groups***

Any agent wishing to set up a Group should first contact [Groups@Cruisingco.com](mailto:Groups@Cruisingco.com). Groups to the *Walt Disney World®* Resort should go through Disney's regular booking process, and not the Groups Department. There are several reasons for this: commissions are not included in the prices, tickets are purchased separately, contracts must be signed, payments made by one credit card, etc. Furthermore, the person signing the contract will be liable for price differences if the minimum (ten rooms) is not booked by a specified date. Therefore, it is advisable that you go through the regular process to book packages for the clients. Should you prefer to deal with the Groups Department, you must receive permission from the Admin Team prior to signing any contracts. Under NO circumstances would an IC be allowed to receive payments directly from a client. Please contact the CCE office with any questions regarding payments.

## ***Welcome Home Survey to your Clients***

CCE offers a wonderful service as part of your annual fee to assist you with obtaining feedback from your clients on your service and their travel experience by conducting a survey. It is a very professional move that lets the clients know we care about their thoughts.

An E-mail will be sent from [surveys@cruisingco.com](mailto:surveys@cruisingco.com) stating "welcome home", and inviting them to take part in a survey for their feedback. If the client participates in the survey, the IC will automatically receive a copy of the client's reply.