

A STEP BY STEP GUIDE
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From Dream to Departure: What to Expect



Hello & Welcome

Planning a vacation should be exciting, not overwhelming. From the first conversation about where you'd love to go to the moment you return home, my goal is to make the process feel personal, organized, and as stress-free as possible.

This guide is designed to give you a clear picture of what you can expect when partnering with me as your travel advisor. It will walk you through each step of the planning journey, from our complimentary Discovery Call and personalized proposal to booking, preparing for your trip, and everything in between.

My job is to handle the research, details, and logistics while you get to enjoy the fun part: dreaming about your vacation.

Let's turn that dream into a beautifully planned journey.



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Your Discovery Call

Your complimentary Discovery Call is about much more than talking about a destination. It is an opportunity for us to get to know each other and determine whether we are a good fit for working together.

For me, this is where I learn about your travel dreams, priorities, preferences, budget, and what matters most to you. For you, it is an opportunity to learn about my services, planning approach, and what you can expect from me as your travel advisor.

- I recommend meeting via Zoom whenever possible so I can share my screen as we explore options and pricing together.
- Please allow approximately 30–40 minutes for our conversation.
- An uninterrupted environment is ideal so we can make the most of our time together.
- A computer is strongly recommended for the best experience when reviewing options and pricing.
- The Discovery Call is complimentary and does not obligate you to book a vacation.
- If you decide to move forward after our conversation, requesting a proposal indicates that you have chosen to partner with me as your travel advisor.

The goal: By the end of our conversation, we should have a clear direction for your vacation and the information I need to begin researching the right options for you.



Your Personalized Proposal

After our Discovery Call, I get to work turning what we discussed into a selection of travel options designed around your wants, needs, and budget.

My goal is to narrow the possibilities so you aren't left searching through endless resorts, ships, room categories, destinations, and websites on your own.

- Most proposals are delivered within a few hours of our Discovery Call.
- More complex vacations or packages may require a few days depending on the suppliers and research involved.
- Your proposal will include options that I believe are a good fit based on what we discussed.
- I am happy to make reasonable adjustments when something needs to be tweaked.
- If the scope of the trip changes substantially and requires researching a completely new destination or experience, a proposal fee may apply. I will communicate this with you before completing the additional work.
- Proposal pricing and availability are not guaranteed until your reservation is secured with a deposit.

Your proposal will remain active for 3 business days. During that time, you are welcome to:

- Review your options as many times as you'd like.
- Share the proposal with your traveling companions or family.
- Discuss the options together.
- Reach out with questions.
- Let me know if you need a reasonable adjustment.
- Decide which option is the best fit for your vacation.

Clear and timely communication is an important part of the planning process. I ask that you respond within those 3 business days, even if your response is simply that you need additional time or that now is not the right time to move forward.

If I haven't heard from you, I will follow up with you.

After 3 business days, the proposal will deactivate and we can reconnect when you're ready to begin planning again.

TELL ME EXACTLY WHAT YOU WANT

Making Your Selections

Once you've reviewed your proposal, the next step is to let me know which components you'd like me to secure.

Simply reply to your proposal email with your specific selections so I know exactly which options you'd like me to secure for you.

Your response should clearly identify the choices you'd like me to book, such as:

- Preferred resort or hotel
- Preferred cruise ship and sailing
- Stateroom or room category
- Travel dates
- Dining preference or dining time
- Package components
- Any other options or inclusions that were presented

I can only move forward with securing your reservation if I know which specific options you've selected.

The goal: A clear response from you allows me to move quickly and accurately into the booking process.



Forms to Complete

Once you've decided to move forward, you'll receive a **Guest Verification Form** by email. This is completed entirely online and digitally sent to me when you submit it.

- You do not need to download or scan anything.
- You do not need to email the completed form back to me.
- Please review your information carefully before submitting.
- Your Guest Verification Form is also where you acknowledge and agree to my Terms & Conditions.

Accurate guest information is essential because the information provided to suppliers must match your travel documentation.

You'll also receive a separate **Payment Authorization Form** by email.

This form is completed online and digitally submitted to me.

Completing the Payment Authorization Form does not give me permission to immediately process a payment.

I will never make a payment on your behalf without your direct written permission to do so. That extra step is intentional. It gives you an opportunity to review exactly what I am preparing to secure before any payment is processed.



Your Courtesy Hold

Once I have received both required forms and have your selections, I can proceed with securing your reservation on a courtesy hold when the supplier allows one.

A courtesy hold is an important step because it can temporarily lock in the selected package components and pricing while you complete your final review.

- Courtesy hold availability varies by supplier.
- I will clearly communicate your courtesy hold deadline in the email I send you.
- You will receive a confirmation document by email with the details of the reservation being held.
- A courtesy hold is not the same as a completed booking.
- If the required deposit is not placed by the deadline provided, the reservation will automatically cancel.

Your Final Review & Written Authorization

This is an important checkpoint before your vacation becomes officially booked. Please carefully review the confirmation document I send you and verify:

- Traveler names and guest information
- Travel dates
- Destination
- Resort, hotel, or cruise ship
- Room or stateroom category
- Package components
- Dining selections, when applicable
- Pricing
- Any other important vacation details



Once you have reviewed everything and are satisfied that it is accurate, reply to my email with your written permission for me to proceed with the required deposit/payment.

Your written authorization must be received before I process the payment. This is one of the ways I protect both you and your vacation investment.

AND NOW THE FUN REALLY BEGINS

You're Officially Booked!

Once your payment has been processed and your reservation is confirmed, your vacation is officially booked!

You'll receive your booking confirmation and we'll move into the next stage of your travel journey. From here, my role doesn't simply disappear after the reservation is made. Part 2 of this guide will walk you through what to expect from deposit through travel and your return home.



Communication Matters

You are always welcome to contact me by phone, text, or email. Email is my preferred method whenever possible because it creates a thorough record of our conversations and makes it easier for both of us to reference important details later.

My regular office hours are:

- Monday–Thursday: 8:00 AM–4:00 PM
- Friday: 8:00 AM–12:00 PM

Messages received outside of normal office hours will be answered on the next business day. Travel emergencies are always addressed immediately.

Terms & Conditions

Please always reference and remain mindful of my [Terms & Conditions](#) throughout the planning and travel process.

These terms are an important part of our working relationship and govern the travel services I provide.

The Best Vacations Are a Partnership

I bring the research, experience, supplier knowledge, organization, and attention to detail. You bring your dreams, preferences, decisions, and timely communication.

Together, we turn your dream into a vacation that is thoughtfully planned from beginning to end.

