

Joining a new host agency can feel overwhelming, but this 10-step onboarding plan provides a roadmap for new independent contractors at SCT Journeys/Spring Chicken Travel to get started successfully with TPI (Travel Planners International). Completing each step methodically will build your foundation in TPI's processes, product knowledge, marketing skills, and accounting/group policies under our experienced team's guidance.

1. Review TPI's policies and procedures thoroughly. Familiarize yourself with their guidelines, systems, and requirements.
2. Complete the TPI Virtual Insight training program to gain an in-depth understanding of their operations.
3. Learn the accounting policies by viewing the training videos on the Suitcase CRM system used by TPI and TravelJoy CRM which is used with TPI's quick submit.
  - You have the option of utilizing Suitcase as a full suite CRM (Customer Relation Manager) included.
  - Additionally, choose TravelJoy (\$10, monthly) including shared forms, templates and itinerary builder.
  - Please stay informed about the laws and policies regarding credit card acceptance for each program.
4. Get familiar with Signature Travel Network, your consortia, by taking their training courses for agents.
5. Sign up and explore at least 3 major vendor portals (e.g., airlines, hotels, cruise lines) to understand their products and booking systems.
6. Ideally you can designate your desired travel specialty or niche market to focus on initially (e.g., luxury, adventure, family, honeymoon, etc.). You can change at a later time.
7. If specializing in groups, learn best practices for:
  - Creating and tracking group bookings
  - Setting up payment schedules and deadline dates
  - Marketing groups to potential clients
  - Submitting accounting for group bookings per TPI policies
8. Learn effective marketing techniques:
  - Set up social media accounts and a content strategy
  - Develop an email marketing plan (Included at TPI central on Monarch)
  - Join local networking groups/events; i.e. Area Chambers, breakfast marketing groups, and Associations
9. Consider additional educational opportunities like destination specialist courses, supplier training, and industry certifications.
10. Reach out to your agency managers, experienced colleagues, and TPI support with any questions via social media group pages, email, text or phone call. Build your professional network.

A few other potential steps:

- Set up your home office/workspace CLIA (Cruise Line International Association) ID card
- Develop your unique brand identity and marketing materials or use our brand
- Create a basic website and list yourself on travel agent finder platforms