Quick Start Checklist

Getting Ready

1

Determine your primary contact person.

Implementing the Smart Trip Tool can be quickly done by any user that has rights of authorship on your website, blog, Facebook page or internal tools,such as Slack. This might be you, your webmaster, office manager, ecommerce administrator or your marketing firm.

2

Placement matters.

Determine the best placement on your site to generate royalties and donations from the Smart Trip Tool. There may be multiple instances. Our Success Team will assist you with known best practices and how to track each approach.

If you are hosting events, many times your customers won't commit to your event until they understand where they will stay overnight. Making it easy for them to book a hotel nearby that meets their needs frees them to purchase tickets or commit to visiting you. So place your Smart Trip Tool near decision points.

Details you will need

3

Gather address, date and time of events to complete the building of your widget. If there is an image of your venue or a logo or graphic, grab the URL for the image. For your staff, donors, or sponsors, you may want to put their photo on the tool and customize it to their preferred hotel chain, car rental company or airline. You also need to choose the brand that you will use for the consumer facing side of the system – the travel results.

Build it

4

Build your widget at portal.tripproximity.com. The simple questionnaire walks you through the steps using the details you have gathered. The toolkit creates a "snippet of code. When embedded in an HTML container in your website, your content management system should render your on your page. You may also choose to host the tool(s) on our site, in which case we produce a list of those tools that can be used by anyone in your organization.

Insert code snippet and test

5

Open an HTML container and paste the snippet of code. Save the page. You will see the widget rendered on your page. Notify Solutionz at 813-925-0789 x8 and we will test it to ensure you have everything you need to begin earning royalties. This occurs automatically after you reach 10 bookings a month or if you upgrade to Level 2 (paid quarterly from the first booking) or Level 3 (paid monthly from the first booking).

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Detailed Checklist

- ❏ Login to Portal

- ❏ Verify info in your Account Page

- ❏ Invite others who need access (tech, marketing, webmaster, social media)

- ❏ Access the Palette and ensure your color numbers are right for each of your platforms (website, blog, Facebook)

- ❏ Review the tool(s) that your Account Team built for you and edit or customize as needed

- ❏ Grab code snippet and install (or send to your webmaster)

- ❏ Don't forget to install a VISIT US venue tool on your corporate site (usually on Contact Us page or any page where you would normally have directions or a map). Look at the MAP view tool for this use case.

- ❏ Advise your Client Success team member that you are done with implementation and send us the URL of the page(s) where the tool(s) are installed

- ❏ We will test and sign off that the implementation of the tool(s) is complete

- ❏ Send us a short testimonial telling us how long the implementation took

- ❏ Rinse and repeat if you are installing the tool in multiple locations/sites/blogs or on Facebook

- ❏ Set your 30-60-90 day review dates on the calendar with your Account Team

Patent Pending

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Marketing Checklist

- ❑ **Review your Facebook presence**
    - ❑ **Remember that less is more**
    - ❑ **Delete any pages that have old or bad info**
        - ❑ Old Events – add new ones or delete the page
        - ❑ Bad Reviews – ensure that you have responded to each one, even if they are old and then work with your fans to see if you can generate some positive reviews
        - ❑ Pages that produce an Error msg. - Delete
        - ❑ Duplicate info – eliminate pages that duplicate each other (e.g. often a VIDEO page and a YOUTUBE page will have same or similar content – Merge & Cull
    - ❑ **Add a VISIT US and/or EVENT page on your site**
        - ❑ Don't be afraid to use ALL CAPS to draw attention to the trip planning capability, as it will make life easier for those visiting you

- ❑ **Ensure that you add FAQ text for the trip planning capabilities**
    - ❑ **At minimum, include**
        - ❑ If you need to make a change or cancellation, click MY ITINERARIES on the smart trip tool (note, click on MY ITINERARIES and get the link if you prefer to put a link in your FAQ
        - ❑ If you would like to send an email or speak with an agent to make the change, click HERE
        - ❑ The detailed FAQ pages on hotel, car and air booking can be found on either of those pages

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Marketing Checklist (continued)

- ❑ **Update website and sales materials to include the traveler/end user benefits - your new differentiators**
  - ❑ **Convenience** – Available right from our site/system
  - ❑ **Context** – Finds available hotels nearby, for the event date/s
  - ❑ **Confidence** - Backed by a 110% best rate price guarantee for hotels
- ❑ **Spread the news about the smart trip planning capabilities**
  - ❑ Any admin or team member who currently answers the "where should I stay nearby" question
  - ❑ Anyone in customer service or sales
  - ❑ Leadership team
  - ❑ Board
  - ❑ Existing customers
  - ❑ If you are a non-profit – tell your donors and corporate partners
- ❑ **Create your marketing calendars for**
  - ❑ Social Media
  - ❑ Newsletters
  - ❑ Email campaigns
- ❑ **Think about how to expand your use of the tool**
  - ❑ Fund Raising
  - ❑ Referrals
  - ❑ Bloggers

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