

TASKS & DATES CHECKLIST

Print one out for each client and keep in their personal vacation file.

CLIENT NAME: _____

Travel dates: _____



IMPORTANT TASKS

- Add Client to CRM
- Link Reservation to MDE
- Send Welcome Email
- Family & Friends Linked
- Discuss Insurance
- Add Celebrations
- Request Flight Info
- Book Magical Express
- Customize Magic Bands
- Make Final Payment
- Bon Voyage Email
- Return Email
- _____
- _____



IMPORTANT DATES

- Dining Reminder _____
- Dining (60 Days) _____
- FastPass Reminder _____
- FastPass (60 Days) _____
- Final Payment Reminder _____
- Final Payment (30 Days) _____
- Cruise Check-In Reminder _____
- Cruise Check-in Date _____
- Cruise Final Payment Reminder _____
- Cruise Final Payment Date _____
- _____
- _____
- _____
- _____