

Guidelines for a Successful Site Visit

Participant Guide

Visiting a site during the sales cycle can help buyers see how the destinations and properties under consideration can provide a unique incentive travel experience for their group. For suppliers, site visits are an opportunity to show off their offerings, deepen the relationship with the buyer, and gain greater insight into buyers' and end users' needs and wants. In this course, participants will explore planning and conducting a site visit.

Learning Objective

After completing this course, participants will be able—

- To plan a site visit that not only showcases the destination or property but also demonstrates how it meets the unique needs of the community of qualifiers.

Before the Site Visit

Site visits during the sales cycle can help suppliers close the sale by demonstrating their expertise and the strengths of what they offer. Such visits also enable buyers to preview all aspects of the proposed incentive travel experience with an eye to how it will benefit their groups. Site visits provide an advance opportunity for both parties to begin building what can potentially be a new, long-term working relationship.



Tips for the Buyer

- Make sure your requests to the supplier are reasonable.
- Plan sufficient time to include as many aspects of the trip as possible in your visit.
- Be transparent about your intentions. If you are visiting multiple suppliers, let them know up front that they are not the only supplier you are considering so they can judge the investment they want to make in your business.
- If your expectation is that all or part of the visit will be on a complimentary basis, let the supplier know in advance so they can plan accordingly.



Tips for the Supplier

- Confirm up front the details of what the buyer expects that the site visit will include, seeking to understand what the buyer's expectations are of the site visit and the incentive travel package.
- Find out in advance who and how many people will be on the site visit. Is it the buyer? A member of the community of qualifiers?
- Communicate your expectations to your vendors regarding discussing price, exchanging business cards, and so on **before** you introduce them to the buyer.
- Work with the buyer to develop the itinerary for the site visit in advance.
- Plan a visit that provides a good and true picture of what you offer the buyer's group—not more and not less.
- Discuss contingency plans to show that you are ready to address potential problems.

During the Site Visit



Tips for the Buyer

- When you visit a destination location with the supplier, picture your group there. Is the site right for them?
- As you talk and interact with the supplier, determine whether you can work with effectively with him or her, the company, the staff, and other key personnel that will serve your group.
- As you preview activities and venues with the supplier, evaluate his or her understanding of your group's needs and wants.
- If you are considering more than one supplier during the site visit, disclose your plans to consider more than one supplier.
- During the visit, imagine the supplier under pressure. Do you think the supplier will go the extra mile to resolve unexpected circumstances or changes for your group?



Tips for the Supplier

- Tailor the agenda of the site visit to the buyer's wants and needs to demonstrate that you understand the buyer's group.
- Learn as much as possible about the buyer and the group; the more you know, the better you can adapt the site visit to showcase how your offerings meet their needs.
- Mimic the agenda and activities planned for the incentive trip as much as possible to give the buyer a realistic impression of your plans for the group.
- Ask questions of the buyer in order to continue to tailor plans for the incentive travel experience to best meet the needs of the buyer's group.
- Keep the agenda for the site visit flexible; be ready to deviate from your original plans when new information you uncover about the preferences of the buyer or his or her group reveal a different location, property, or activity would be a better option for this particular group.
- Above all, LISTEN. Get to know the potential client, work on developing rapport and establishing a basis for a mutually respectful working relationship.

Activity: Planning a Site Visit

Read the case study below. It describes a sales interaction between an incentive travel buyer and the sales professional for an incentive travel company. Consider what the buyer should want to find out or achieve during the site visit. Do the same for the supplier. Then follow the instructions after the case study.

Chicago: A Destination of Many Options

Janet Mason is an incentive travel buyer who is working with Fairview Manufacturing, a large manufacturer of auto parts. She is working on an incentive travel experience for Fairview supervisors and managers whose divisions have exceeded their production goals by 15 per cent or more for two years in a row. In the past, over 200 managers have qualified for the incentive trip.

Fairview's primary facility is located in rural South Dakota.

Janet has worked with Fairview for many years, and she is very familiar with the community of qualifiers and their likes and dislikes. Although this group often describes themselves as "farm kids," she knows that they enjoy visiting big cities and experiencing the exciting city environment—so different from their rural community. Many of them have engineering backgrounds and are interested in technical and engineering feats. In the past, Fairview incentive travelers have visited New York City and Los Angeles. Fairview has instructed Janet that they are reducing their budget for this trip by 10 per cent. While many of the previous year's participants—who will most likely qualify for this year's trip as well—expressed the desire to return to New York City, Janet knows that the budget will not go far enough in the Big Apple.

Fairview agreed to Janet's recommendation of Chicago, IL for the next incentive travel destination. Chicago offers all the amenities of a large urban area, but Janet believes they can save money on the costs of both the transportation to Chicago and lodging.

Janet scheduled a site visit to Chicago to meet with the representatives of two destination management companies. A Fairview buyer and a member of the Fairview executive team will accompany her on the visit. The Fairview buyer and executive are slightly hesitant about travelling around Chicago because of the recent press about violence in the city.

Andy Scofield is the owner of Destination: Windy City, one of the two destination management companies on Fairview's short list. He and Janet have never worked together, and they do not know each other well. He has talked with her a number of times and submitted a response to the Fairview RFP. However, Andy would like to understand more about the preferences and interests of the potential participants in order to plan the perfect Chicago experience for Fairview.

Janet's RFP indicated that the qualifiers fall into two groups—middle-aged men and woman who have been managers at the Fairview facility for at least 15 years, as well as younger Millennials who have less than five



years of experience as supervisors or managers. Janet's RFP described many members of this group as rabid professional sports fans. Another large segment enjoys live theatre.

Andy has many ideas for memorable experiences he can create for Fairview's group. He doesn't know which sport the group is most interested in—football? baseball? For that matter, are they more Cubs fans or White Sox fans?

Andy has many possibilities for ideas for potential experiences that might appeal to the Fairview group. He can set up their attendance at a White Sox baseball game where they watch the game in the owner's box at Comiskey and be visited before the game by several White Sox players. Another potential event is a private improv workshop for the group conducted by members of the Second City company. Participants might enjoy attending a Broadway in Chicago production with a behind-the-scenes tour to meet the cast. Or they might go for a private reception and architecture cruise on a private yacht on the Chicago River or Lake Michigan. The possibilities are endless, but he needs more information about the group's likes and dislikes. Chicago offers so many possibilities, but which one would give the Fairview group the biggest thrill?

The buyer's perspective

What should the buyer plan to learn more about during the site visit? What does Janet and the Fairview team need to know in order to make the buying decision between the two DMCs? List three things that you would want to explore in more depth if you were in Janet's position. For each item you identify, write down a specific way that Janet might obtain this information before or during the site visit.

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The supplier's perspective

What should the supplier want to find out about the buyer's incentive travel plans? What should Andy plan to showcase or achieve during the site visit?

List three things that you would want to explore in more depth if you were in the supplier's position. For each item you identify, write down a specific way that Andy might accomplish these objectives before or during the site visit.

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Knowledge Check Questions

1. A site visit that occurs during the sales process—before contracts are negotiated—can help close the deal or help buyers rule out an incentive travel package.
 - a. True
 - b. False

2. For each planning consideration for site visits listed, indicate whether it applies to the incentive travel **buyer** or the incentive travel **supplier**.
 - a. Communicate who will pay for what.
 - b. Confirm expectations.
 - c. Identify who will participate in the site visit.
 - d. Discuss details in advance with vendors who will participate in the site visit.
 - e. Include as many aspects of the experience as possible.

3. The site visit is an excellent opportunity for discussions about contingency plans in case problems occur during the incentive travel experience.
 - a. True
 - b. False

4. Suppliers should stick to the agenda/itinerary for the site to make sure that the buyer experiences exactly what the supplier originally proposed and planned for the incentive travel experience.
 - a. True
 - b. False