



TA Trip Tracker – Understanding the Post Trips Pipeline

The Post Trips Pipeline manages the traveler experience during and after travel. This pipeline focuses on client service, follow-up communication, and long-term client retention. All movement in this pipeline is automated based on the Trip Start Date and Trip End Date.

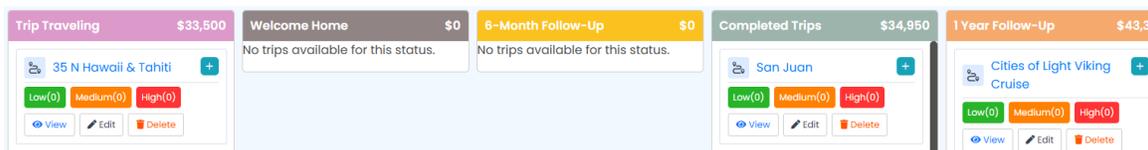
Automation Triggers

Automation in this pipeline is triggered by:

- Trip Start Date
- Trip End Date

If these dates are entered correctly, TA Trip Tracker will automatically move the trip through the correct stages of the post-travel lifecycle.

Example of the Post Trips Pipeline



Post Trips stages including follow-ups

Trip Traveling

The Trip Traveling stage begins automatically on the Trip Start Date and remains active until the day after the Trip End Date.

Advisor focus during this stage:

- Be available if the traveler needs assistance
- Monitor for supplier issues
- Provide concierge-level service if needed

Welcome Home

The Welcome Home stage begins automatically the day after the Trip End Date and remains active for 7 days.

Advisor focus:

- Send a welcome home message
- Ask about the traveler's experience
- Request reviews or testimonials
- Encourage referrals

Trip Completed

Trip Completed is a holding stage between follow-up milestones. The trip will remain here until the next automated follow-up occurs.

6-Month Follow-Up

Trips automatically move to the 6-Month Follow-Up stage six months after the Trip End Date.

Advisor focus:

- Reconnect with the traveler
- Suggest new travel ideas
- Share upcoming promotions or opportunities

1-Year Follow-Up

The 1-Year Follow-Up stage occurs one year after the Trip End Date. This is a powerful opportunity to reconnect with the traveler and encourage repeat bookings.

Advisor focus:

- Reference their previous trip

- Suggest planning their next vacation
- Promote new destinations or offers

Why the Post Trips Pipeline Matters

The Post Trips Pipeline ensures that every traveler receives thoughtful follow-up communication. This helps strengthen relationships, generate referrals, and increase repeat bookings.

Best Practices

- Always enter accurate Trip Start and End Dates
- Send a Welcome Home message promptly
- Use follow-ups to inspire the next trip
- Keep client relationships active even after travel ends