Client Discovery Checklist

A conversation guide for travel advisors

How to use: Type in the shaded cells only. Focus on what matters most to your client; not every question will apply to every trip. Your entries stay on your device and are not sent to Travel Webinars.

Client and occasion

Client / travel party	
Consultation date	
Trip occasion	

1. The big picture

Where would you like to go? Are you open to alternatives?	
What inspired this trip?	
What would make the experience feel truly special?	
Is there anything you definitely want to avoid?	

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2. Dates and budget

Preferred travel dates and flexibility	
Departure city and ideal trip length	
Total budget range, currency, and what it should cover	
Where would you prioritize spending — and where are you comfortable compromising?	

3. Who's traveling?

Number of travelers and children's ages, if applicable	
Room arrangements and bedding preferences	
Mobility, accessibility or dietary requirements relevant to planning	
Different interests or needs within the group	

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4. Travel style

Preferred pace: relaxed, balanced or activity-filled?	
Guided experiences, independent exploration or a combination?	
Preferred accommodation style and comfort level	
Comfort with walking, activity levels, transfers and longer travel days	

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5. Experiences that matter

Choose Yes, No or To discuss for each interest, and add specific preferences in the notes.

Interest	Yes / No / To discuss	Notes
Food & wine		
History & culture		
Wildlife & nature		
Adventure		
Beaches & relaxation		
Arts & local crafts		
Wellness		
Cruises		
Other interests		
Must-do experiences		
Previous trips they loved — and why		
Preferences around group size, privacy and local interaction		

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6. Agree on next steps

Client's top three priorities	
Questions requiring supplier confirmation	
What you will prepare next	
Proposal timing and next conversation	
Advisor notes	

Planning reminder: Confirm availability, accessibility, inclusions and current terms directly with suppliers before presenting recommendations.