Supplier Comparison Worksheet

Find the right partner for your client and make your recommendation

How to use: Type in the shaded cells only; white cells calculate automatically. Enter each supplier's name once below and it appears at the top of every table. Compare client fit and overall value, not just price, and confirm current details directly with each supplier. Your entries stay on your device and are not sent to Travel Webinars.

Client and trip

Client / trip reference	
Travel party	
Destination and travel dates	
Client's top three priorities	
Additional factors important to this client	

Suppliers you're comparing

	Supplier A	Supplier B	Supplier C
Supplier name			

Supplier Comparison Worksheet

1. Compare the essentials

Consideration	Supplier A	Supplier B	Supplier C
Product, itinerary or proposal			
Relevant destination expertise			
Travel style and ideal client			
Private, small-group or independent			
Group size, if applicable			
Accommodation standards			
Activity level and accessibility			
Customization available			
Local guides and on-trip support			

Supplier Comparison Worksheet

2. Advisor partnership — confirm for each supplier

Consideration	Supplier A	Supplier B	Supplier C
Commission rate (%)			
Commissionable amount (quote currency)			
Estimated commission (calculated)			
Commission paid by			
Booking process and response times			
Named contact or advisor support channel			
Emergency assistance arrangements			
Client documents and pre-departure support			
Relevant training or selling resources			

Estimated commission = commissionable amount × commission rate. The commissionable amount often excludes taxes, fees and other non-commissionable items, so confirm it and the final commission with each supplier.

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3. Understand the total value

Consideration	Supplier A	Supplier B	Supplier C
Quoted total and currency			
Per person or total trip price?			
Included accommodations, meals and activities			
Transfers and transportation			
Important exclusions and extra costs			
Taxes, fees and gratuities			
Deposit and final payment dates			
Cancellation and change terms			
Quote validity and availability			
Are these proposals comparable? Note differences in dates, room categories, included services or assumptions that could make a price comparison misleading.			

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4. Make your recommendation

Best-fit supplier	
Why this option fits the client's priorities	
Trade-offs or limitations to explain	
Questions still requiring confirmation	
Next action and follow-up date	
Information checked on	

Planning reminder: Supplier offerings and terms can change. Record when information was checked, and obtain written confirmation of important inclusions, requirements and terms.