Webinar Notes & Action Plan

Turn learning into practical next steps

How to use: Type in the shaded cells only. Use this during a live webinar or replay to capture useful insights and decide how you'll apply them to your business. Your entries stay on your device and are not sent to Travel Webinars.

Webinar details

Webinar title	
Supplier / organization	
Presenter(s)	
Date watched	
Webinar / replay link	

1. Start with a purpose

What do I want to learn or clarify?	

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2. Capture the key takeaways

Takeaway 1	
Takeaway 2	
Takeaway 3	
Destinations, products or experiences to explore	
What makes this offering distinctive?	

3. Identify the right client fit

Which traveler interests, preferences or trip types does this suit?	
What client need or concern could this help address?	
Who might not be a good fit — and why?	
How would I describe the value in my own words?	

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4. Record details to verify

Use Yes for confirmed, No for not confirmed, or To discuss for follow-up.

Detail	Confirmed? Yes / No / To discuss	Notes
Inclusions and exclusions		
Pricing, availability and travel dates		
Activity levels and accessibility		
Booking, payment and cancellation terms		
Advisor support and commission details		
Any offer's eligibility, booking deadline and travel window		
Questions for the supplier		
Supplier contact or follow-up link		

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5. Create an action plan

Next action	Target date	Status	Notes

Possible actions: Review a sample itinerary, request clarification, save relevant materials to My Library, or prepare a tailored client recommendation.

6. Return to what matters

Resources or links worth keeping	
One thing I will put into practice	
Date to review my progress	

Learning reminder: Webinar information reflects what was presented at the time. Verify current product details, offers and terms before sharing recommendations with clients.