

Package Planning Worksheets

GETTING STARTED

What is the name of package?

Is there package theme? If so, what is it?

Who is the target market?

(Think about demographics and travel motivators/interests. For example age, visitor origin, singles/couples/families, niche interests, etc. Who would be interested in this package?)

Package Duration:

Half Day Full Day Overnight Multi-day

Think about the following questions:

- What makes your package different from others in the area?
- What is your competitive advantage?
- What are the unique benefits/features does your package offer to the visitor?
- Why would someone want to purchase your package?

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PACKAGING ELEMENTS

List the elements of the package including accommodations, activities, attractions, meals, transportation, guides, value-added elements:

THE EXPERIENCE

Describe the package experience.

Think about the memories, messages or new learning you want your guests to take away from the package – what are they?

How many of the five senses are you engaging? Circle all that apply.

Sight Smell Taste Touch Hear

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THE ITINERARY

Things to think about when planning the itinerary:

- What elements can be organized in advance to help ensure seamless execution?
- Can the experience be simplified without affecting the overall impact?
- Have you included something the guest can take away with them to remind them of their experience.
 - Not always necessary! Do not include something just for the sake of providing a souvenir. If you do, make sure it fits with the package theme.
 - Be mindful of price and perceived value. Be careful not to drive up the cost of the package or reduce your profit margin solely to include a memento.
- Is there value in including a specialist, guide or subject matter expert to enhance the experience?
- Are there safety considerations? If so, have a plan and share this plan with your partners!
- Is the package balanced in terms of structured and unstructured activities, active participation and passive participation? If not, what can you change?
- Are there any special training, licences or insurance required to deliver your package?
- Do your partners share your commitment to quality and delivery of the best possible guest experience?

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THE ITINERARY cont'd

Consider all of the elements included in the package and outline a detailed itinerary for the guest's experience from beginning to end.

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PRICING

	Cost per person
ACCOMMODATION	
Room Rate	
DMF (if applicable)	
MEALS	
Breakfast	
Lunch	
Dinner	
Snacks	
Gratuities	
TRANSPORTATION	
ATTRACTIONS	
ACTIVITIES	
VALUE ADDED ITEMS	
OTHER	
ADMINISTRATION	
SUBTOTAL	
Mark-up	
Subtotal	
Commission (if applicable)	
TOTAL COST	
PER PERSON PRICING	

*Make sure to consider single and double occupancy

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PARTNERSHIP AGREEMENT

This agreement is by and between _____ (Packager)
and _____ (Supplier)

Supplier Name:	
Address:	
Phone:	
Email:	
Main Contact:	
Accounting Contact:	

Services to be provided:

Rates:

Voucher and Billing Procedure:

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PARTNERSHIP AGREEMENT cont'd

Cancellation Policy:

This Agreement covers a period commencing on _____
and ending on _____.

The parties executive this Agreement. Each person who signs this Agreement below represents that such person is fully authorized to sign this Agreement of behalf of the applicable party.

PACKAGER

SUPPLIER

By: _____ By: _____

Print Name: _____ Print Name: _____

Date: _____ Date: _____

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OTHER CONSIDERATIONS:

- Where/How will the package be promoted?
- How can visitors book the package?
- Are there minimum / maximum participation numbers to be considered? If so, what are they? (Consider break-even point and capacities for activities/attractions, etc.)
- What is your payment policy? Will you require a deposit upon booking?
- What will the visitor receive to confirm the booking? (Confirmation number, printable voucher? Cancellation policy? Payment information? Any information relevant to the visitor.)
- How will service issues/complaints be handled with partners?
- What will you do in terms of follow-up post-package?