Small-Network Client Finder

A 30-minute start for independent travel advisors: pick a trip, start a few relevant conversations, and give each lead a next step.

05 min	10 min	10 min	05 min
Pick one trip and traveler	**Map five** relevant contacts	**Send up to three** personal messages	**Log status and** the next action

Choose one trip you can talk about clearly

Who it's for

Trip type or occasion

One question or problem you can help them with

Map five people across these three circles

People who know you / Referral partners / A local group, such as a chamber of commerce

Name or role	Why this is relevant	Best way to reach them

Fictional example: a spring-break family cruise

A swim-school owner you met through the chamber could forward your simple cruise planning checklist to interested parents. Ask the owner first; don't request their customer list.

Trade the pitch for a useful ask

Send up to three relevant messages. Use a detail that explains why you chose that person, and make it easy to say no.

01 Direct message to someone you already know

Hey [name], you mentioned [relevant detail]. I'm putting together a short checklist for families thinking about a spring-break cruise. Would it be useful if I sent it over?

02 Ask a referral partner to pass it along

Hey [name], a few of your families might be thinking about spring-break travel. If it's useful, would you be comfortable forwarding this checklist to anyone who asks? They can contact me if they want help.

03 Turn a reply into discovery

Happy to help. What dates can work, who is traveling, and what budget range feels comfortable for the trip? If it looks like a fit, would [day/time] work for a quick chat?

Make one message your own

My first message (include why I thought of this person)

When they say yes, write down what you agreed

Dates, travelers, budget range and one must-have

What I'll do next, and by when

Use initials if you prefer. Don't record card numbers, passport details or other sensitive information here.

Give every lead a next step

The goal is a clear decision or a next action with a date. Write down what actually happened, not just what you hope happens.

Your first conversations

Initials or role	Status	Next action	Due date

Status ideas: asked, replied, discovery booked, deciding, booked, or closed.

Follow up on the day you agreed

Hi [name], when we spoke, you wanted [priority]. [Option] fits because [reason]. Would you like to move forward, adjust something, or leave it for now? Happy to go with what suits you.

Before you move an inquiry to booked

- [ ] Confirm the total price, fees, deadlines and key change or cancellation terms.
- [ ] Get a clear yes or no. If they're deciding, agree on the next action and date.
- [ ] For a yes, use the approved secure payment process and send confirmation.

Fictional example: what action looks like

A parent requests the checklist. Ask about dates, travelers and budget. If it's a fit, agree to send two options Tuesday and review them together Thursday.

My next block

When I'll sit down to follow up	What I'll repeat or change next time