

The Task Force surveyed the club director membership and received replies from 21 club director addressing questions about whether or not they have struggled with low numbers, what type of trips had the most difficulty filling and what they have done in the past to help salvage the trips.

The results of this survey helped direct the discussion as it was clear that it is a problem for our banks and they did not have many good solutions for solving the problems. The Task Force broke the problem down to several parts and have created this Best Practice document with the idea that these suggestions would be implemented in the order presented for the most success:

- First, determine what additional marketing can be done
- Seek out other bank clubs to consider for Networking Partners
- Analyze the Pricing and see if there are ways to save money and still run the trip with the low numbers.
- Finally, determine if you want to alter logistics and possibly the quality level of the trip to save the money needed to run the tour

Below are the ideas you might consider under each of these categories. It is understood that not all trips will get enough people to run and may therefore have to cancel. However, following some of these guidelines may very well help you eliminate cancellations and disappointment to you and your customers.

### **ADDITIONAL MARKETING**

- Pump it up in the newsletter
  - Move to prominent location on newsletter
  - Add photos to newsletter
  - Alert - newsletter out of regular cycle
  - Usually everything longer than a 1-day trip includes the full itinerary
  - Add club trips by date on annual calendar sent to customers
- Email marketing
  - Special news piece on trips
- Facebook and social media
- Personal calls
  - Call those signed up on the tour for friends and family
  - Call those you "think" would be interested
  - Call past travelers
  - Phone calls really draw them for day trips

- PTOs assistance if an extended trip
  - Extra Travel Shows
  - Prepare postcards that bank can mail out
  - Help design buck slips to be sent with bank statements
  - Posters of the destination
- Signage
  - Rolling signs outside banks
  - Message Boards in the bank
- In-Bank and branch marketing
  - Go to regular customer service meetings to tell Tellers what the club is doing
  - Organize a teller meeting when you want them to push something - a trip, membership, etc.

## **NETWORKING**

- Find another bank club that is going to the same destination and join forces. Joining with others can reduce the price for everyone and can even save a trip from cancellation. There are many ways to facilitate networking.
- Use the PTOs
  - They can be very helpful in finding others to join a trip that is at risk of cancellation due to low numbers
  - HCI Preferred Tour Operators are often the best resource available
- Reach out to any HCI club director who is going where you plan to go
  - There are mixed feelings about having outsiders on a club trip, but knowing that the outsiders are from another HCI club really helps.
  - They don't have to live near you to be a great companion as you can always meet up at the destination.
  - Use HCI website as a tool to coordinate trips with other clubs regardless of their proximity.
    - Refer to HCI's published member renewal profiles that club directors can search to find others who are considering travel to the same destinations.
    - HCI is considering creating an annual calendar of bank travel dates for member reference. Stay tuned....
- Reach out to neighboring HCI club directors
  - Partnering with other club directors who are in proximity to you makes it easier to pull off a trip logistically.
  - It helps prevent issues that can arise when passengers are from very different locales (e.g. rural vs urban, Midwest vs East Coast).
  - Refer to HCI's Member List that can be referenced by bank location.
- Be proactive in relationship-building
  - Attempt to get to know the directors in your area before the need to work with them on a trip arises.
  - Remember to stick up for yourself and your members.
- Team up with non-bank club organizations (e.g. Rotary and Elks)
- Communicate last minute opportunities via email with other HCI club directors

Reminder: The host club director has the right to decline the offer to join forces for any reason at all. It seems as though it is preferable to keep the trip open to just the members of the host's club. As such, if a trip is not at risk of cancellation, most club directors would choose to keep it a members-only trip. It is also possible that the host club director does not want to work with a particular peer director for any number of reasons. This would not need to be disclosed when declining the offer to team up. A simple statement could be given such as, "Thank you for your offer. We have decided to limit the participants on this trip to our club's membership and guests."

## **PRICING**

- Reduce bank profit
  - Don't like to cut profit habitually, but may be willing to do so to save the trip
  - Look at the full year and determine if cutting trip profit on one trip and can be made up for on other trips or other programming.
  - Most of our Banks are not worried about profits but more worried about losses
- Discount to add travelers
  - Most banks are unwilling to offer different pricing to members.
  - Rather than discount give extras
  - Discounts on the front end for signing up for the trip
- Non-members should be welcomed without extra fee
  - Non-members might have a late signup cutoff date and then welcome them with no fee
  - Ask them all to become members, but be very flexible
- Tour operators want to make it work, may adjust pricing
  - Ask your PTO to see what they can do to reduce pricing without reducing quality.
  - This was determined to be an uncommon practice and the advise to reach out to them was helpful.

## **LOGISTICS**

- Change to a smaller motor coach
  - Bank may have a van or rent a van
  - Airport Transfers - use personal cars instead of motorcoach
  - Usually choosing a smaller coach is not worth the risk due to poor quality/less features of smaller coach, poor suspension and price difference isn't that great
- Change quality level of hotels if less important like airport properties or hotels enroute to the destination
  - Consider if changing the concept would be a pro or con
- Reduce number of club directors that are comp
  - More reliant on bus driver and tour operator to provide assistance
  - Use the HCI Partner CVBs to do some guide work for a short time when you are in town
- Remove over the road tour guide if bank club director can handle it alone
  - Add step on guides instead and the club director and driver become critical to get to each step-on guide location
  - Tour operator may provide the notes you'll need
  - Consider that this may lower the overall quality of the tour and increase stress on club director
- Change to hotel that includes breakfast or change the type (cost) of breakfast
  - Change breakfasts from large complete breakfasts to smaller continental breakfasts
- Rebook airfare in two ways - either just to lower rates or to changes schedule for better rates.