DWHSA Master Class: Breaking Down the Honeymoon Workflow

(October 7, 2025)

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9 to 12 Months Ahead

[This timeline assumes you already have honeymoon leads to work with.]

Collect information from the prospects about their HM dreams and needs.

Give them a questionnaire and ask what they've researched so far.

Try to get answers from both prospects (as well as any other "decision makers" who may be paying for the trip).

Create a HM questionnaire form in advance that you can give couples. (DWHSA has samples in the Resource Center inside DWHSAMembers.com.)

- **Ask your web site company if it allows you to create forms on your site.**
- **Use a form builder service such as Jotform.com or Google Forms.**

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763-862-8774

Name(s) ____________________

Daytime Phone ____________________

Destination #1

Destination #2

Is there something you already have in mind?

Have you done any research online?

Do you have an idea of what you'd like to spend?

What is the one thing you are most looking for in this trip?

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9 to 12 Months Ahead

Schedule a consultation to discuss the HM plans with the couple (in person, via phone, using Zoom, etc.).

Ask follow-up questions based on what you've learned so far.

Check specifically for budget levels and anyone else who might be joining them (e.g., buddymoons).

Use a calendar program to allow couples to request appointments with you:

- **Calendly.com**
- **AcuityScheduling.com**
- **Appointlet.com**

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Individual Vacations - New Trips

Honeymoon or Couples Travel Consultation
30 minutes
Book

Wedding Officiant & Premarital Coaching

Wedding Officiant Consultation
30 minutes
Book
Schedule your complimentary one-on-one ceremony planning session with Larissa Parks.

Premarital Coaching Consultation
30 minutes
Book

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9 to 12 Months Ahead

Give the couple your client agreement/plan-to-go agreement form and answer any questions about it.

If you require a signed agreement before you begin work on the HM proposal, explain how that works (and make sure the clients receive a copy of the signed agreement).

And, if you charge service/planning fees, explain those as well and work with the couple to collect those fees now.

Create a template for your client agreement that you can reuse with different couples. DWHSA has samples inside DWHSAMembers.com, and we have a Client Agreement Kit developed with the help of attorneys (USD$75).

- **Paper forms/your CRM**
- **Docusign**
- **DocHub**
- **HelloSign**
- **Square**

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ABC ROMANCE TRAVEL

Travel Services Agreement

(NOTE: This agreement is written for all types of trips that usually involve just a couple or a small group that will not require a room block.)

This agreement is made as of the last date on the signature page between the following parties:

[The full legal name of your agency/business, including "Inc." and "LLC" and similar endings] by [Your name]
[Your full address]
[Your telephone number]
[Your email address]

CLIENTS:

[Clients' full legal names]
[Clients' full address(es)]
[Clients' telephone numbers]
[Clients' email addresses]

We're excited to work with you on your travel plans! In this agreement, we'll describe what we'll do for you – and, we'll explain your responsibilities as clients. ("We," "us," and "our" will refer to [your agency/business name], while "you" and "your" will refer to you of course as well as all others on whose behalf you're acting [and for whom you're

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9 to 12 Months Ahead

Begin researching HM trip options for the proposal/quote (including HM packages [free or paid] offered by those suppliers).

Check the clients' travel dates with suppliers for lodging availability. Also, check any conflict with the destination's local/national holidays, the distance from the airports to the resorts or ports, weather patterns for that time of year, high/low tourism seasons, and desired resort/ship amenities.

Collect in advance the honeymoon packages offered by your preferred resort companies so you can review and learn them.

Check holidays for any destination at timeanddate.com/holidays.

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9 to 12 Months Ahead

Prepare the proposal/quote (using tools such as Adobe Spark, MS Word or PowerPoint, Travefy, etc.).

Include a mix of options (usually three choices) along with any pricing/deposit information and disclaimers.

Try to include maps of the resorts, photos, room/cabin descriptions, and your contact information.

Follow up with the couple to lock down the final choice.

Use DWHSA's PowerPoint template for proposals – or create your own template that you can reuse with different couples:

Travefy, AXUS, or other itinerary builders
Adobe Express (formerly Adobe Spark)
MS PowerPoint or Google Slides

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9 to 12 Months Ahead

Once the clients have made a final choice, book the trip components for them: lodging (including the HM package they'd like if available), transfers (if you're ready to do so), and airline tickets (if you handle air for clients).

Regarding air, check requested seat assignments, special inflight meals, checked and carry-on bag requirements, luggage fees, etc.

(Follow your standard booking procedures.)

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9 to 12 Months Ahead

Check the supplier's requirements for any proof the couple must submit to confirm that they've gotten married recently to qualify for honeymoon packages.

For example, your clients may need to upload a copy of their marriage license to the supplier's web site to qualify for its free honeymoon services.

As you're researching your preferred suppliers' honeymoon packages in an earlier step, keep a handy list of any suppliers that require documentation before you can book those packages for couples.

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9 to 12 Months Ahead

Once they've booked the trip with an initial deposit, give the couple the due dates for remaining payments (and "pad" those dates by a few weeks in case a credit card doesn't work then). Along with payment confirmations, make sure you send the couple the HM itinerary, any disclosure/disclaimer notices you use, a checklist of trip tips such as passport validity dates, the need for correct name spelling on government IDs and reservations, COVID-19 issues, cancellation policies, etc. Recommend travel insurance (and collect signed waivers if they decline insurance). And, enter these new clients into your CRM/database right away.

Create an email template to give couples their due dates and remaining payment amounts.

Use an itinerary builder such as Travefy or AXUS to create individual itineraries for each couple.

Create a template page listing passport tips, cancellation polices, etc.

ALWAYS use travel insurance waiver forms.

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9 to 12 Months Ahead

Verify their passports and visas. (Once they've gotten married, your clients may need to update the passport with their married surname. If they travel on their honeymoon under any name other than the one printed on their documents, they may need to carry additional proof such as an official copy of the marriage license.)

As mentioned earlier, create a tip sheet with passport rules (e.g., checking the validity dates.)

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TRAVEL DETAILS CONFIRMATION SHEET

Behind the scenes, we're juggling many moving parts to make your trip happen! That's why we're asking your help to check the important details within your travel plans. Please review your travel documents, your itinerary, and the other materials we've given you for your trip, answer the questions below for yourself, and contact us if you have any questions. Thanks so much for your help!

THE BASIC TRIP DETAILS

Did we spell your name correctly on every travel document we gave you (e.g., airline ticket, hotel/resort/cruise reservation)?

Does your name as shown match your legal name as it appears on the valid government-issued form of ID that you plan to use at the airport or cruise port? (Remember: The ID you plan to present must be currently valid, and your name shown on the ID must match exactly your name as shown on the air/hotel/cruise documents.)

Is your date of birth correct (as it appears on your airline reservation, for example)?

Did you receive from us a COMPLETE itinerary for your trip – showing flight dates/times and airport names, departure/arrival city information, and hotel/resort/cruise dates?

INTERNATIONAL TRAVEL

We recommend generally that [U.S./Canadian] citizens traveling outside the country have a passport that's valid for at least six months after the date of your return home.

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9 to 12 Months Ahead

Create a master file and "to do" timeline for the HM. Begin collecting completed forms and correspondence for the couple and the supplier all in one place.

Create a checklist or use a Trello board template to give each couple a list of the next steps in their honeymoons (what you're doing and what they must do) along with due dates.

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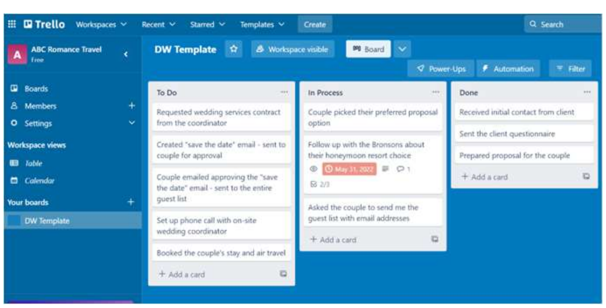

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3 to 9 Months Ahead

Help the couple create a honeymoon registry if they wish (using tools such as HoneymoonWishes.com). Explain how the registry works, the fees involved, and their options for withdrawing or spending the collected funds.

Select a honeymoon registry company (e.g., Honeymoon Wishes, Honeyfund). If possible, create a template for your clients' registries that features your company name and logo.

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3 to 9 Months Ahead

Decide in advance how you'll handle tasks such as price matching requests, frequent flier numbers and award ticket redemptions, seat assignment requests/upgrades, etc.

Create a sheet of written policies explaining how you deal with price match requests, frequent flyer points, and other flight details.

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3 to 9 Months Ahead

If you use online reservation forms, make sure they are PCI compliant and secure for accepting credit/debit card information.

When you create any payment forms (e.g., your client agreement with a service fee), confirm that the service you're using is approved to accept credit cards safely.

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3 to 9 Months Ahead

Note the confirmed guests' due dates for interim and final payments on your calendar so you can invoice them or follow up as needed.

Use Trello board or your own work calendar (e.g., your CRM) to give yourself early prompts for each couple's interim and final payments – and pad those dates!

Create a standard invoice form (or use your CRM's invoice system to set up a template) that can be reused with different couples.

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3 to 9 Months Ahead

Stay in contact with the couple on a regular basis. Send them emails once every two to four weeks with trip updates, packing tips, photos of the destination/resort/ship, etc. - anything to touch base with them regularly so they're not tempted to start looking around online! Consider Zoom calls or phone calls as well to stay in touch.

When the honeymoon is booked, schedule a Zoom, an in-person visit, a phone call, etc., to review the itinerary in detail.

Draft a series of prewritten emails you can send honeymoon couples every couple of weeks to stay in touch (e.g., weather patterns, a honeymoon packing list).

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The Final 90 Days

Confirm any special needs requests (e.g., diet restrictions, mobility challenges) they've made with the supplier.

Collect any final payments from the couple and send receipts/confirmations as needed.

Deliver final travel documents to the couple.

If you repurpose travel documents received from suppliers before you give them to clients, create a final travel documents template into which the suppliers' information can be plugged.

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The Final 90 Days

Help them spend or withdraw any funds they've collected through the honeymoon registry.

Confirm the details for items in the HM package with the supplier so nothing is missed.

Discuss with the couple any excursions, activities, and special on- or off-site events and meals planned for the HM trip. (Book those ahead of time so you can earn commission wherever possible.)

Set up a reminder three months before the honeymoon departure so that you can discuss excursions and activities with each couple. Confirm these bookings for them so that you can earn commissions. Consider vendors such as Project Expedition that allow you to create trackable "shopping lists" of excursions for your couples.

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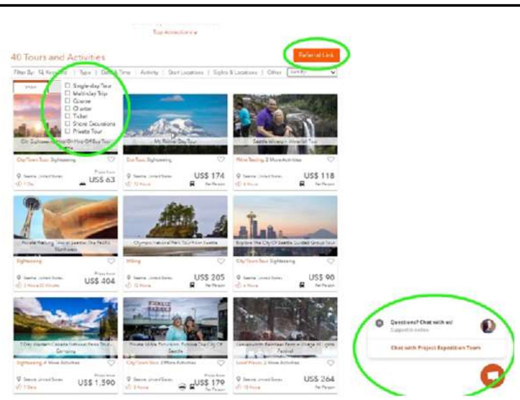

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The Final 90 Days

Send final emails to appropriate on-site staff for any special requests or needs.

Share with the couple your emergency contact information to use while they're traveling. (Make sure you're available to answer calls and emails on those days!) Confirm the couple's arrival on site with the transfer company or the resort/cruise line staff.

Create a "VIP guest" template that you can reuse with each couple to send to resorts ahead of time.

Create a "before you depart" tipsheet to give clients with final instructions for getting to the airport early, contacting you/the supplies if something goes wrong on the trip, etc.

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After the Honeymoon

Send the couple a "welcome home" email, letter, or gift to greet them after the trip. Then, follow up with them personally to see how things went. And, ask them to share their story by giving you a copy of their favorite photo from the trip and a few sentences about it (instead of "asking for a testimonial").

Follow up on your commissions.

- **Create this "welcome home" email in advance and reuse it with future couples.**
- **Use a free survey tool (e.g., SurveyPlanet.com) to give them a post-trip survey.**
- **Create a template for asking couples to give you a testimonial (e.g., an email asking them to share their favorite photo and 2-3 sentences about it that you can share with others).**

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Things to create/set up

- Create a honeymoon questionnaire form that you can give couples to fill out.
- Set up an appointment calendar on your web site.
- Create a client agreement template that you can customize for each couple.
- Collect details on the honeymoon packages offered by your preferred suppliers (including any documentation required [e.g., marriage certificate copy] to book them).
- Create a honeymooon proposal template that you can reuse for different couples.

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Things to create/set up

- Create an email template for sending clients the confirmation for their honeymoon trip that includes remaining due dates and amounts. (Make this a checklist showing any remaining honeymoon planning steps.)
- Select an itinerary builder company such as Travefy or ASUS.
- Create a honeymoon booking reminder sheet that covers passport/visa tips, your cancellation policies, your rules for price match requests/frequent flyer tickets, and other policies.
- Contact your travel insurer to request language to use on a travel insurance waiver form (or get a copy of the insurer's recommended form).

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Things to create/set up

- Pick a honeymoon registry company (and create a common template or look for the registries your couples will use).
- Create a standard invoice form (probably inside your CRM) to use with couples.
- Draft a series of a dozen prewritten emails you can use to stay engaged with couples (e.g., a honeymoon packing list, weather patterns in the destination).
- Create a final travel documents template if you repurpose the supplier's documents before they're given to your clients.
- Pick an excursions vendor that will allow you to create trackable "shopping lists" for your couples to preplan their activities.

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Things to create/set up

- Create a "VIP guest" template you can send to resorts ahead of time.
- Create a "before you depart" tipsheet for couples (e.g., stopping mail delivery, getting to the airport early, checking passport expiration dates).
- Create a "welcome home" email or letter.
- Use a free survey tool to get feedback on the trip.
- Create an email template for asking couples to give you a testimonial.

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Questions?

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615.730.9977

DWHSA's Facebook group

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