## PRE-TRAINING INFORMATION

Thank you for enrolling in the **Agency Targeting** course. Please print this guide prior to your scheduled training session. Print multiple copies if you will be joined by others from your property.

The instructor-led webinar is an advanced look at using agency targeting strategies and best practices. If you have not already done so, review the series of animated Quick Tour demonstrations which provide an overview of each dashboard.

Links to the Quick Tours and additional training resources, are available in Online Help within any Hotelligence360 application. Just click the "**?**" button at the top right hand corner of any dashboard to access Online Help, then select **Quick Tours**.

Recommended Course Prerequisite:

- **Hotelligence360 Getting Started**, either instructor-led or online self-paced.
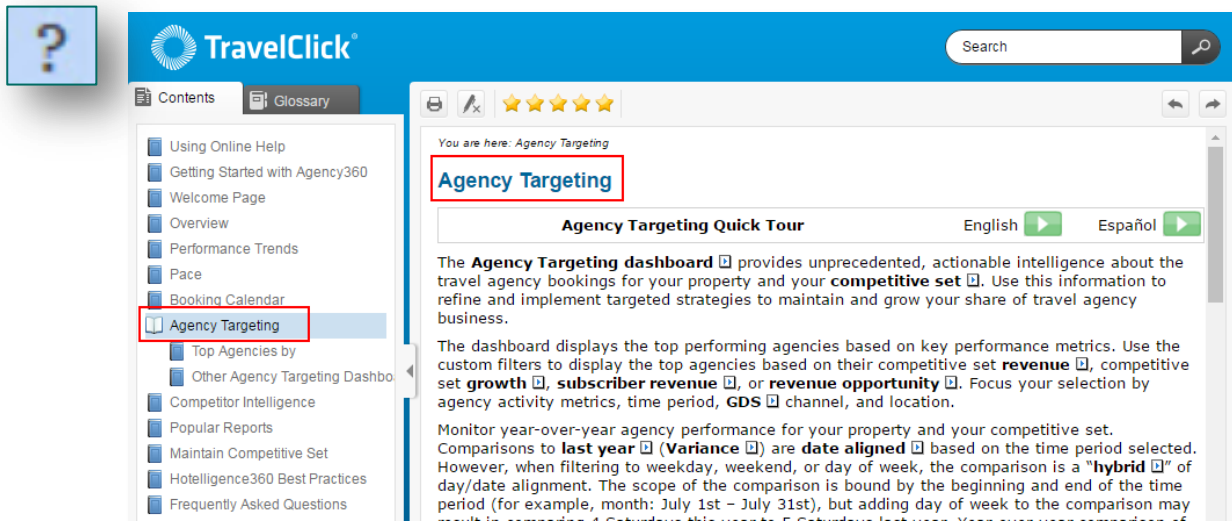
COURSE OBJECTIVES

After completing this course, you will be able to use agency targeting information to:

- Identify key agency performers
- Recognize time-saving navigational tools and tips
- Qualify potential agency targets
- Identify key source markets and their contributing agencies

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AGENCY TARGETING DASHBOARD

Use this dashboard to:

- Identify your best supporters (and your competitive set's best supporters)

- Identify agencies that may provide the largest opportunities for you

- Identify share shifters

- Devise sales and marketing plans

Top 25 Agencies By Comp Set Revenue for All Rate Types (YTD through 18 Mar 2015)
*A maximum of 150 Agencies will be retrieved.

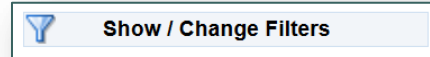|	Agency	Penetration			Subscriber					Comp Set				
		Surplus / (Opportunity)	Revenue Penetration	Variance	Revenue	Variance	Room Nights	Variance	ADR	Revenue	△▽ Variance	Room Nights	Variance	ADR
1	CWT Aon (TU11V)	$1,582	132	116	$6,522	$5,523	24	19	$272	$49,791	($19,916)	209	(58)	$238
2	Carlson Wagonlit Travel (5PMF)	$202	104	25	$5,000	$1,760	24	9	$208	$49,691	$6,562	225	46	$221
3	HRG US (KL1F)	($3,832)	12	12	$527	$527	2	2	$263	$49,157	($3,289)	202	(23)	$243
4	Travel N Transport (1H0A1V)	($2,278)	49	34	$2,155	$1,379	10	7	$215	$48,380	($12,377)	191	(26)	$253
5	JTB Cwt Bts (15Z41V)	($4,237)	0	(29)	$0	($1,232)	0	(6)		$48,305	$1,631	183	1	$264
6	BCD Travel Blackrock Concur (J1FH)	($4,227)	0		$0	$0	0	0		$48,188	$48,188	155	155	$311
7	AEGBT (43UC)	($4,016)	5	5	$228	$228	1	1	$228	$48,155	($11,130)	209	(29)	$230
8	JTB Cwt Business Travel Solutions (94V1V)	($53)	99	(63)	$4,556	($1,648)	23	(2)	$198	$47,981	$10,441	195	40	$246
9	Merit Travel Group (YTO4M2100)	($2,618)	40	40	$1,740	$1,740	9	9	$193	$47,932	$9,206	179	39	$268
10	APPLE INC (VK87)	$15,280	354	60	$21,290	$11,467	94	58	$226	$47,216	$19,045	200	101	$236
11	Ultramar Travel Bureau (O6U0)	($2,045)	53	(2)	$2,271	($463)	11	(2)	$206	$46,929	($6,940)	195	(11)	$241
12	American Express Business Travel (STONA2263)	($4,096)	0	(21)	$0	($570)	0	(2)		$46,687	$16,090	224	97	$208
13	Amex Btc Mexico Patriotismo (2T57)	($4,059)	0	(13)	$0	($1,061)	0	(3)		$46,274	($46,625)	113	(85)	$410
14	Carlson Wagonlit T (C9G1G)	$1,772	138	(16)	$6,381	($3,037)	26	(11)	$245	$46,163	($14,023)	194	(51)	$238
15	AEGBT (FW7A)	$436	110	45	$4,888	$2,155	21	13	$233	$45,864	$264	206	7	$223
16	Adelman Travel Hartford Res (TC71)	$8,645	265	5	$13,878	$7,058	55	22	$252	$45,775	$22,770	205	109	$223
17	Carlson Wagonlit Travel (M2FC)	($3,954)	0		$0	$0	0	0		$45,078	$82	211	21	$214
18	Carlson Wagonlit Tvl (7GT1G)	$4,053	186	178	$8,756	$8,548	43	42	$204	$44,857	$16,130	182	82	$246
19	AEGBT (2B6W1V)	($3,917)	0		$0	$0	0	0		$44,654	($15,853)	168	(53)	$266
20	American Express World Bank (DCAAX2100)	$1,812	141	92	$6,271	$3,363	25	14	$251	$44,560	($20,285)	216	(69)	$206
21	Carlson Wagonlit Travel (2S001V)	$9,307	280	6	$14,483	$6,174	60	27	$241	$44,526	$18,257	186	79	$239
22	Cwtcarlson Wagonlit Travel (LC21V)	($3,896)	0		$0	$0	0	0		$44,416	($2,261)	168	(15)	$264
23	Latham And Watkins Pm Squared (O6BA)	($2,862)	28	19	$1,125	$628	3	1	$375	$44,331	($14,878)	165	(31)	$269
24	AEGBT (B7V9)	($482)	89	63	$3,725	$2,277	18	13	$207	$44,236	($20,115)	200	(80)	$221
25	Carlson Wagonlit Travel (G9XG)	$6,599	236	133	$11,458	$7,010	45	29	$255	$43,932	($808)	200	15	$220

BEST PRACTICES

- Click column headers to re-sort table.

- Use the view selector above the table to view contact information for each of the agencies in the table.

Select View Agency Data and Contact Information ▾

Set Room Nights	Variance	ADR	GDS Source	IATA	PCC	Address	Address 2	City	State	Postal Code	Phone	Country
209	(58)	$238	Galileo	14559860	TU11V	1430 Branding Lane Suite 200		Downers Grove	Illinois	60515	PH: 630.725.1088	United States
225	46	$221	Sabre	26569373	5PMF	1862 Lackland Hill Pkwy		Saint Louis	Missouri	63146	PH: 314.993.2476	United States
202	(23)	$243	Sabre	34788924	KL1F	3426 Toringdon Way	Ste 400	Charlotte	North Carolina	28277	PH: 704.365.6065	United States
191	(26)	$253	Galileo	52522945	1H0A1V	777 E Wisconsin Avenue		Milwaukee	Wisconsin	53202	444.765.3500	United States
183	1	$264	Galileo	16308434	15Z41V	5 8 40 Kiba		Koto Ku Tokyo	-	1350042	PH: 03-5245-9314	Japan

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CUSTOM FILTERING

Take advantage of the dashboard's filtering capabilities! Click the **Show/Change Filters** button.

▽ **Show / Change Filters**

Filter Selection 1 – time periods, rate type, competitive set.

* Time Period	Other Month						* Competitive Set
YTD	--Select Value--			Rate Type			Primary
Day of Week Type	Day of Week	Apply		--Select Value--			
--Select Value--	--Select Value--						

* Time Period	Other Month
Other	(All Column Values)
	✓ (All Column Values)
Day of Week Type	Sep 2015
Weekday	Oct 2015
	Nov 2015
	Dec 2015 Apply
	Jan 2016
	Feb 2016
	Mar 2016
	Search...

* Time Period	Other Month
YTD	--Select Value--
Day of Week Type	Day of Week
--Select Value--	--Select Value-- Apply
Weekday	☐ SUN
Weekend	☐ MON
Search...	☐ TUE
	☐ WED
	☐ THU
	☐ FRI
	☐ SAT
	Search...

Tip: select "Other" (Time Period) to enable "Other Month" selector.

Tip: select "Weekday" (Sunday - Thursday), "Weekend" (Friday and Saturday), or one or more specific "Day of Week".

| Rate Type |
| --Select Value-- |
| (All Column Values) |
| Consortia |
| Corporate |
| Non-Neg / Other |
| Search... |

In addition to viewing all rate types, you may filter down to:

Consortia – associated with any major consortia program (e.g. AMEX, CWT, Radius, THOR, etc.)

Corporate – associated with any negotiated/contracted corporate program.

Non-Negotiated – any rate that is neither a consortia nor corporate rate: BAR, rack, discount, unqualified or qualified (AAA, BAC, government, military, etc.)

Filter Selection 2 – subscriber revenue penetration and agency comp set activity.

| | Agency Comp Set Activity | | | | |
| Subscriber Revenue Penetration | Comp Set Revenue | Comp Set ADR | Comp Set LOS | Comp Set Lead Time | |
| Between ___ - ___ | Between ___ 200000 | Between ___ - ___ | Between ___ - ___ | Between ___ - ___ | Apply |

Filter Selection 3 – agency affiliation, location or identification, GDS, metrics.
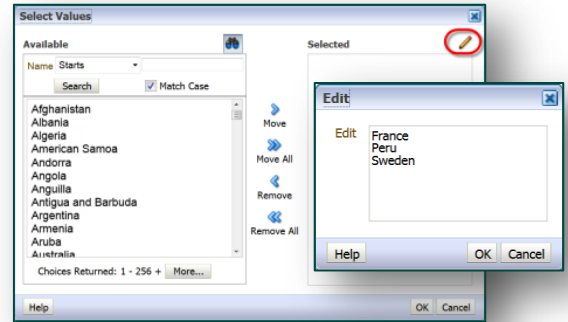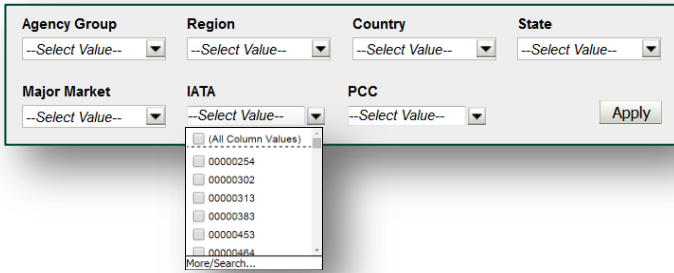

- Select a **Match** type from drop-down list.

- The text you enter is case sensitive.

- Click **More** if list is greater than 256 items.

- Use single arrow buttons to move selected items, or,

- Double arrows to move entire list.

- Click **OK** within the dialog box, and,

- Click **Go** in the filter box, OR

- Click the Edit icon.

- Type entries in the box or copy and paste from another source.

- Click **OK** within both dialog boxes, and,

- Click **Go** in the filter box

CLEAR FILTER SELECTIONS

- Click **Page Options** icon in the top toolbar

- Click **Clear My Customization** to remove all filters currently applied and to return to the dashboard's default view.
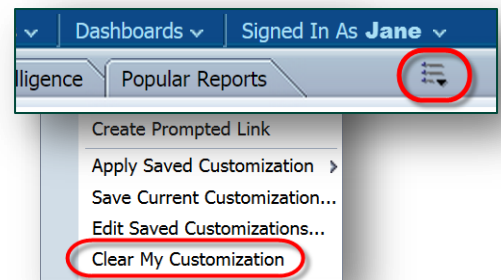
LISTS OF MORE THAN 50 RECORDS

    Scroll down   Display all
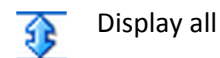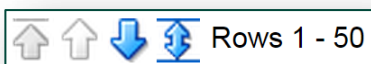
SAVE AND APPLY FILTER SETTINGS

- The **Page Options** icon is found to the right of the tabs.
- Click "**Save Current Customization**".
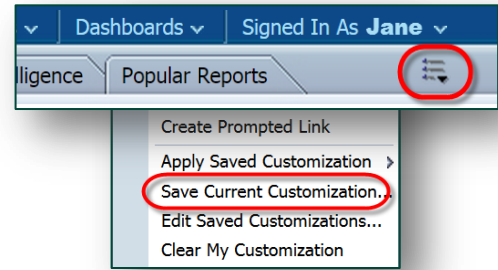
- Enter a name for the selection; for example, "2015 AMEX Report".
- Check the box if you wish to make this default view for this dashboard.
- Click the **OK** button.

There is no limit to the number of custom views you create and save.
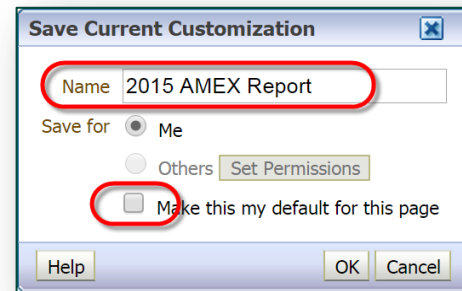
DISPLAY SAVED VIEWS

- From the **Page Options** button select "**Apply Saved Customization**".
- Click any of your saved reports.
- Your Hotelligence360 application will reset all filters and display your results.
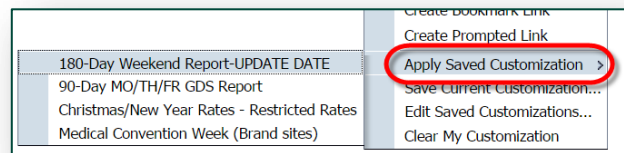
BEST PRACTICES

- Save your frequently-used filter combinations as a "Customization".
- Use filters to create shorter, more relevant lists rather than longer lists.

OTHER AGENCY TARGETING DASHBOARDS

Non-Corporate Agency Targeting – use this dashboard to display the agencies booking the greatest amount of any non-corporate rate revenue into your competitive set compared to your property.

Top Corporate Agencies – use this report to display the agencies booking the greatest amount of corporate rate revenue into your competitive set.

Top Corporate Agencies (Booking Comp Set Only) – use this report to display the agencies booking the greatest amount of corporate revenue into your competitive set and that do not book corporate rates into your property. This list may serve as a proxy to identify companies who might be worth pursuing during the next RFP season.

Other Agency Targeting Dashboards

- Non-Corporate Agency Targeting
- Top Corporate Agencies
  - Top Corporate Agencies (Booking Comp Set Only)
  - Underperforming Corporate Agencies
- Top Consortia Agencies
- Top Agencies with Rate Type Mix
- Top Revenue Share Shift Agencies
- Top 150 Agencies

- Agency Group Performance
- Agency Group Performance with Flexible Month Filtering

- Agency Targeting with Flexible Month Filtering
- Agency Targeting by IATA

Underperforming Corporate Agencies – use this report to display the agencies booking corporate rate revenue into both your property and your competitive set, and that may hold the greatest revenue opportunities for your property. Did you win the RFP from this agency/company? If so, are you getting your share of the business?

Top Consortia Agencies – use this report to display the agencies booking the greatest amount of consortia revenue into your competitive set.

Top Agencies with Rate Type Mix – use this report to display the agencies booking the greatest amount of revenue into your competitive set and detailed by rate types.

Top Revenue Share Shift Agencies – use this report to display the agencies in which your property is losing significant revenue share to the competitive set compared to performance the prior year.

Top 150 Agencies – use this report to display the 150 agencies booking the greatest amount of GDS revenue into your competitive set. This list includes the additional agency identification and contact information.

Agency Group Performance – use this report to display the agency groups or consortia booking the greatest amount of revenue into your competitive set. "Not Affiliated" refers to agencies that are not part of (or that could not specifically be identified as belonging to) any of the major groups.

Agency Group Performance with Flexible Month Filtering – use this report to display the agency groups or consortia booking the greatest amount of revenue into your competitive set for multiple months at the same time. This option allows to select more than one month at a time.

Agency Targeting with Flexible Month Filtering – another version of the Agency Targeting dashboard, which allows you to select more than one month at a time.

Agency Targeting by IATA – use this report to display the top travel agency IATA numbers that meet the criteria of your search using your selected filter settings.

APPLY YOUR KNOWLEDGE

1. In an Agency Targeting results table, what might be implied by an agency's revenue variance matching its current revenue volume?

    A. A mistake in the data.

    B. A travel agency that is new to the competitive marketplace.

    C. A travel agency that is shifting its business to my property.

    D. My comp set has been increasing its rates.

2. True/False: I can use the Agency Targeting dashboard to obtain phone numbers for each travel agency.

3. I can view travel agency booking activity based on which of the following time periods?

    A. Last week.

    B. The month of October two years ago.

    C. The next 13 weeks.

    D. Any of the above.

4. True/False: I can use the Agency Targeting dashboard to learn the corporate accounts booked by any travel agency in the world.

ALERTS

Activate alerts by clicking the **Alert Subscriptions** link.
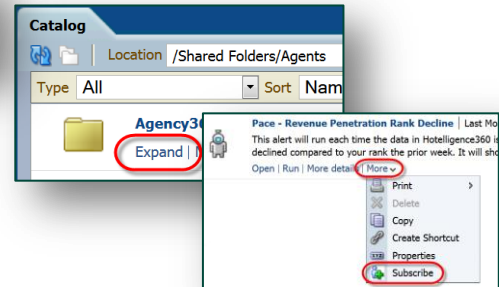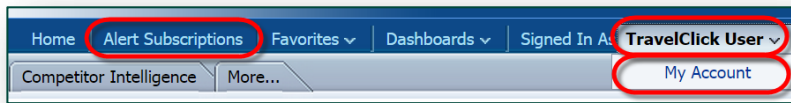
To subscribe:

- Click **Alert Subscriptions** on the top toolbar.

- Click **Expand** to view available alerts.

- Read the description of each alert.

- Click **More** and **Subscribe** to add your User ID to the notification list for that alert.

- There is no cost associated with Alert Subscriptions.

Note: Alerts are displayed within the application or may be emailed to subscribers, but are secured by access and subscription. At no point is data sent to unauthorized users regarding a particular property or its comp set.

Click the **Subscribe** link for each alert you wish to activate. Please note: There is no charge associated with any of these alert "subscriptions".

BEST PRACTICES

- Select the **Agency Data and Contact Information** view to display identification and contact information for each agency.

- Access an agency's phone number, address, IATA number and PCC code from the **Top 150 Agencies** report or any agency results table.

- Click the **GDS** column to group the records by **GDS**.

- Subscribe to these alerts:

  o **Top Agencies Shifting Revenue (Last Month)**

  o **Top Agencies Shifting Revenue (Next 4 Weeks)**

AGENCY PROFILE

It is important to keep in mind this profile is a reflection of the agency's GDS booking activity only.

AGENCY IDENTIFICATION AND PERFORMANCE METRICS

Agencies that serve a single account sometimes include that account name either as part of the agency name or in address line 2.

If no account name is present, the agency may have intentionally chosen to suppress that information, or, the agency may serve multiple accounts.

**YOUR PROPERTY**

YOUR COMPETITIVE SET

YOUR MARKET

"Market" includes all properties associated with your GDS city code and GDS airport code(s). This is not meant to be considered a competitive set.

Note the percentage of the agency's business that goes to the top hotel in your competitive set. This area displays the top 1-X hotels that are responsible for booking 75 – 85% of the GDS revenue in your competitive set?

ROOM NIGHT DISTRIBUTION BY PRICE RANGE

- All bookings in past 12 months; this may include both peak and off-peak pricing.

- Includes all properties in your competitive set.

- Includes all rate types/room types
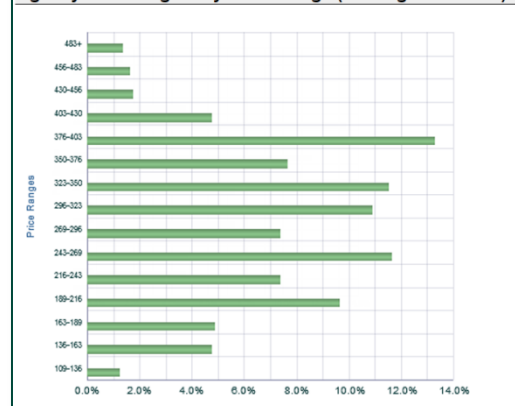
AGENCY ACTIVITY

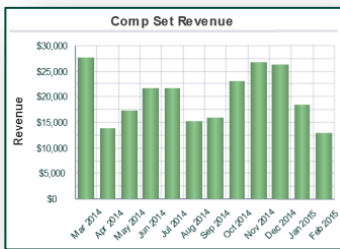Note how selecting varying rate types may alter activity results.

Rate Type

--Select Value--

(All Column Values)

Consortia

Corporate

Non-Neg / Other

Search...

Comp Set Revenue

Month	Subscriber					Comp Set					Penetration	
	Revenue	Revenue Growth	Room Nights	Room Night Growth	ADR	Revenue	Revenue Growth	Room Nights	Room Night Growth	ADR	Revenue Penetration	Room Night Penetration
Mar 2014	$0		0			$27,582	5,392.2%	98	4800.0%	$281	0	0
Apr 2014	$0		0			$13,682	456.0%	44	528.6%	$311	0	0
May 2014	$0		0			$17,237	143.4%	47	147.4%	$367	0	0
Jun 2014	$0		0			$21,558	216.0%	62	195.2%	$348	0	0
Jul 2014	$0		0			$21,668	217.5%	79	216.0%	$274	0	0
Aug 2014	$0		0			$15,201	88.2%	53	112.0%	$287	0	0
Sep 2014	$0		0			$15,911	(6.9%)	43	(2.3%)	$370	0	0
Oct 2014	$0		0			$22,971	48.4%	59	40.5%	$389	0	0
Nov 2014	$0		0			$26,604	107.8%	82	110.3%	$324	0	0
Dec 2014	$0		0			$26,234	515.4%	74	335.3%	$355	0	0
Jan 2015	$0		0			$18,320	41.5%	87	77.6%	$211	0	0
Feb 2015	$0		0			$12,963	(35.2%)	69	(29.6%)	$188	0	0
Total	$0		0			$239,932	109.8%	797	105.4%	$301	0	0

Activity for both the past 12 months and the next 13 weeks is displayed, both for your property and your competitive set.

RATE TYPE PROFILE

WEEKEND/WEEKDAY PROFILE
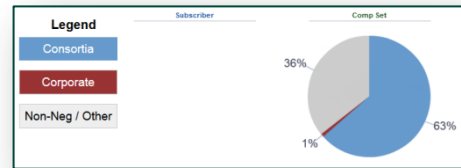
	Subscriber						Comp Set					
	Revenue This Agency	Revenue All Agencies	LoS This Agency	LoS All Agencies	Lead Time This Agency	Lead Time All Agencies	Revenue This Agency	Revenue All Agencies	LoS This Agency	LoS All Agencies	Lead Time This Agency	Lead Time All Agencies
Weekday		89.0%		2.1		18.5	95.6%	89.5%	2.3	2.1	17.3	16.9
Weekend		11.0%		3.1		27.8	4.4%	10.5%	3.1	2.9	14.6	28.2

Use these tables and charts to examine rate types and booking traits for your property and your competitive set.

BEST PRACTICES

Use Agency Profiles to:

o   Qualify prospects; not every agency may be a good fit for your strategic goals.

o   Monitor your own top agencies; be certain they produce as expected throughout the year.

TOP SOURCE MARKETS DASHBOARD

This dashboard—found under **Popular Reports** and on the **Home** page—displays markets where the top booking agencies are located. These are *not* necessarily your guests' cities and countries of origin.

|		Subscriber					Comp Set						Penetration		
	Major Market	Room Nights	Growth	Revenue	ADR	Lead Time	LoS	Room Nights	Growth	Revenue	ADR	Lead Time	LoS	Room Night Penetration	Variance	Revenue Surplus / (Opportunity)
1	Phoenix	2,359	(0.5%)	$574,094	$243	13.3	2.0	30,679	(4.0%)	$7,698,311	$251	10.8	2.1	81	3	($151,581)
2	New York City	1,558	32.8%	$368,822	$237	15.1	2.0	16,531	(0.9%)	$4,085,169	$247	13.3	1.9	98	23	($21,892)
3	Chicago	1,211	26.1%	$286,870	$237	14.1	1.9	14,879	(0.2%)	$3,681,584	$247	12.3	1.9	86	17	($61,252)
4	Los Angeles	1,018	27.4%	$243,891	$240	11.4	2.0	7,717	10.4%	$2,001,636	$259	13.0	2.1	133	16	$46,908
5	Miami FL	581	45.3%	$135,020	$232	9.4	2.1	7,010	2.7%	$1,704,743	$243	12.0	2.1	87	24	($26,368)
6	London	999	38.2%	$237,472	$238	19.7	3.2	6,770	(3.3%)	$1,779,657	$263	17.7	3.0	147	40	$60,525
7	Jacksonville FL	203	(8.6%)	$50,827	$250	10.8	2.2	6,018	39.1%	$1,506,310	$250	10.9	2.2	37	(18)	($85,769)
8	Seattle	410	(31.8%)	$106,601	$260	10.9	2.2	4,360	4.5%	$1,075,775	$247	13.5	2.1	98	(46)	$2,881
9	Tampa	424	9.6%	$105,314	$248	16.5	1.8	4,135	(7.0%)	$1,031,754	$250	12.8	1.9	106	15	$5,568
10	Manchester GB	447	(11.1%)	$102,015	$228	17.1	4.3	3,287	(12.0%)	$818,357	$249	17.1	3.7	136	1	$21,278
11	Charlotte	279	34.1%	$63,245	$227	16.5	1.9	3,199	(19.6%)	$788,680	$247	16.6	1.8	91	35	($11,488)
12	Dallas	240	4.8%	$56,063	$234	12.1	2.1	3,123	(4.7%)	$775,051	$248	16.9	2.0	81	7	($16,845)
13	Atlanta	315	24.0%	$77,585	$246	13.6	1.7	3,093	9.2%	$758,977	$245	13.6	1.8	105	12	$4,200
14	Boston	314	40.8%	$75,096	$239	11.7	1.5	3,044	(8.8%)	$794,850	$261	11.2	1.5	107	35	($1,218)
15	Toronto	203	2.5%	$47,173	$232	13.1	2.0	2,837	(2.3%)	$721,688	$254	13.1	2.1	76	3	($20,273)
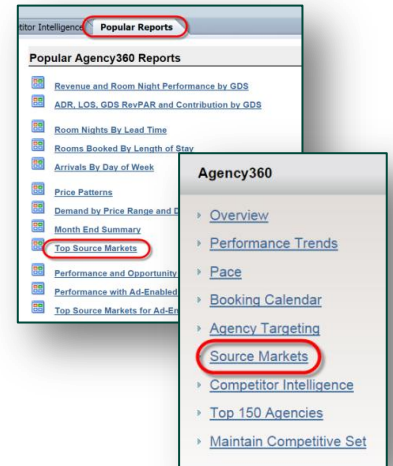
Click any city or country name to access lists of agencies from that market contributing revenue to the competitive marketplace.

Top Agency Opportunities – agencies that may provide the largest revenue opportunities for your property.

Top Agency Supporters – agencies that book the most revenue for your property.

Agency Market Leaders – these agencies are the top bookers for your market; use this list to identify agencies that may not typically book into your competitive set.
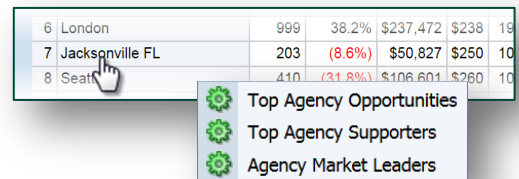
BEST PRACTICES

- Use this dashboard to assist in planning sales calls and/or marketing campaigns.

- Look for Market Leader agencies that book neither your property nor your competitive set, then review the agency's profile to qualify it.

- Remember to apply time period and alternative competitive set filters to this dashboard.

APPLY YOUR KNOWLEDGE

1. True/False: the Agency Profile compares your revenue, ADR, and lead time to your competitive set and to your market.

2. In which of these ways might the Agency Profile help me decide to NOT pursue business from an agency?

    A. Undesirable ADR.

    B. Wrong weekday/weekend mix.

    C. They book only certain seasons.

    D. They seem to book last-minute only.

    E. Any of the above.

3. True /False: the **Top Source Market** dashboard allows me to quickly identify the cities my guests are traveling from.

4. True/False: the **Top Source Market** dashboard assists in designing sales call planning and marketing campaigns.

SUMMARY AND NEXT STEPS

OBJECTIVE CHECKLIST

Do you feel able to use the Agency Targeting, Agency Profile, and Source Markets dashboards to perform the following procedures?

_____ Identify key agency performers

_____ Recognize time-saving navigational tools and tips

_____ Qualify potential agency targets

_____ Identify key source markets and their contributing agencies

If you feel you need additional learning resources on any of these areas, check online help by clicking the ? button on any dashboard or clicking the section name of any chart or table. The associated Quick Tours for these dashboards will also prove helpful.

CUSTOMER CARE

Additional assistance is just a phone call or email away. Find TravelClick Customer Care contact information at: http://www.travelclick.com/contact-customer-care.

NEXT STEPS

Now that you know how to get the most out of the Agency Targeting features of the Agency360 application, it's time to apply what you learned to your own business. Here are some recommended next steps:

• Review the Agency Targeting, Agency Profile, and Source Market Quick Tours.

• Start creating and saving your filter combination selections you will use frequently.

• Incorporate your Agency Targeting reports into your strategic plan for budgeting and forecasting purposes.

• Use Agency360 to monitor results of your strategy.