



LIFE OF A CONTRACT – FROM INCEPTION TO CONSUMPTION

Lead/Inquiry Receipt – Sales Manager receives a lead or inquiry through any lead Source



Create **Prospect Booking** in Delphi under appropriate account



Run SSG to ensure the quoted rate passes.



- If **SSG passes** → Respond to Lead/Inquiry via phone call + proposal, and make appropriate notes in Group Booking
- If **SSG fails** → take screenshot of failed SSG – send SSG exception to DOS who will pass onto Revenue Manager. If an approval comes back, then Respond to Lead/Inquiry via phone call + proposal, and make appropriate notes in Group Booking



Once Client contacts Sales Manager to commit to the booking:

PROSPECT to **TENTATIVE**

- **Merge a contract in Delphi**
[ensure all rates, cutoff dates; Method of Payment, and Reservation method are correct. Ensure any blocked space has also pulled correctly].
- **Have contract approved and initialed** by appropriate management [DOS, DOC, GM, etc]
- Scan and **send contract to client** for review and signature along with a Credit Card authorization form to ensure Method of payment is received with contract.
- Turn Booking **Tentative** in Delphi and print booking recap
- Pass off **Tentative packet** to Sales Coordinator/Admin so they can **build Group Tentative in R&I** [or Brand Inventory System] to secure the inventory.
[Tentative packet to include approved contract, SSG showing passed, or SSG exception if failed, Booking Recap with washed numbers]
- Tentative booking is now housed in a Tentative Binder awaiting client signature.



Once signed contract is received:

TENTATIVE to **DEFINITE**

- **Sales Manager to Countersign** and date.
- Gather **tentative packet** from tentative binder to attach to Turnover.
- **Completely fill out Contract Turnover sheet and ensure all necessary documentation is attached:**
Turnover sheet; Signed contract; SSG + approval if applicable; Booking Recap; Method of Payment; Tax Exemptions, or any other billing info; POs for commissions, concessions, etc; any pertinent emails, notes, or inquiry sheet that coordinator can reference to detail group.
- Pass off **Contract Turnover packet** to DOS/DOC/GM and have contract countersigned and dated by appropriate management. **DOS to turn Contract Definite.**



- **Full Contract Turnover packet** gets passed to Sales Coordinator/Admin so they can build a **Hard Copy Working File**, build a **file for Contract Binder**, and if applicable a **third file for Accounting** ensuring any Credit Authorizations are removed from Sales files and ONLY put in Accounting's copy to ensure PCI compliance.
- **Hard Copy Working File** gets filed in filing cabinet in future Groups under appropriate date.
- **File for Contract Binder** gets placed in Binder for Sales Audit
- **Accounting** will receive either a full copy of entire packet – or at minimum the necessary billing info with method of payment.
- **Sales Coordinator/Admin/CSM to send a welcome email**
to introduce themselves, send any pertinent info such as Cutoff Dates, Rooming List template, **Booking, Instructions, Booking link** if requested, and any other vital information relevant to their Group.



Prior to Group Arrival:

- **At appropriate date, Sales Coordinator/Admin/CSM will pull the Hard Copy Working File to begin detailing the Group:**
Rooming lists, Menu Selections, etc. Will send out reminder emails as necessary to ensure all information needed is received.
- **BEOs if applicable get sent to client for signature.**
Once signed BEOs are received, a copy is placed in their file and another copy is given to Banquets.
- **Resumes are created for Staff Meeting.**



After Group Departure:

- **Once Group Consumes, Sales Coordinator/Admin/CSM to send Thank You letter and final banquet checks** if applicable for signature. Will also submit for **Loyalty Event Planner Points** if applicable.
- **File is now complete and can be filed under past Groups!**