LIFE OF A CONTRACT – FROM INCEPTION TO CONSUMPTION- HYATT

Lead/Inquiry Receipt – Sales Manager receives a lead or inquiry through any lead Source
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Create **Prospect Booking** in Envision under appropriate account
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Run SSG to ensure the quoted rate passes.
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- 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

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Once Client contacts Sales Manager to commit to the booking:
PROSPECT to TENTATIVE

- **Merge a contract in Envision**
  [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 Opera** 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.

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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, Deposit Schedule, Rooming List template, **Booking, Instructions, Booking link** if requested, and any other vital information relevant to their Group.

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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, Deposit Schedule, 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.**

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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 **Gold Passport Points** if applicable.
- **File is now complete and can be filed under past Groups!**