# LIFE OF A CONTRACT – FROM INCEPTION TO CONSUMPTION

## MARRIOTT FULL SERVICE

**Lead/Inquiry Receipt** – Sales Manager receives a lead or inquiry through any lead source.

Create **Opportunity (if not already done) and Quote** in CI/TY and reserve all the function space

Run SSG to ensure the quoted rate passes.

- If **SSG passes** → Respond to Lead/Inquiry via phone call + proposal, and make appropriate notes in the level 2 activities tab under the quote.
- 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 the level 2 activities tab under the quote.

**Once Client contacts Sales Manager to commit to the booking:**
**PROSPECT** to **TENTATIVE (T1)**

- **Merge a contract in CI/TY under the level 2 contracts tab**
  [ensure all rates, cutoff dates; Method of Payment, and Reservation method are correct. Ensure any blocked space has also been reserved].
- **Have contract approved and initialed** by appropriate management [DOS, DOC, GM, etc]
- Scan and **send contract to client** for review and signature If paying with Credit Card, be sure to check the credit card email box under the quote on the second level billing tab. If not paying with credit card, check the correct form of payment
- Turn Booking **T1 in CI/TY** and print a quote opportunities details report.
- Tentative packet to include approved contract, quote opportunity detail report, SSG showing passed, or SSG exception if failed, Booking Recap with washed numbers.
- Tentative booking is kept with the Sales Manager that originated the booking until contracts are returned and ready for turnover.

**Once signed contract is received:**
**T1** to **DEFINITE**

- Gather **tentative packet** to attach to Turnover.
- **Completely fill out second level Turnover tab under the quote**
- **Ensure all necessary documentation is attached:**
  Contract Checklist; Signed contract; SSG + approval if applicable; Booking Recap(Quote Opportunities Detail Report); Method of Payment checked properly under the billing tab; 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 or leave as T1 based on terms of contract.

- **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, a copy for the CSM, and if applicable a fourth 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 the countersigned contract along with any pertinent info such as Cutoff Dates, Rooming List template, Booking link if requested, and any other vital information relevant to their Group.

**Prior to Group Arrival:**

- **At appropriate date, CSM will 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 **Marriott Rewarding Event Points** if applicable.
- File is now complete and can be filed under past Groups.