LIFE OF A CONTRACT – FROM INCEPTION TO CONSUMPTION

MARRIOTT SELECT SERVICE

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

Create **Opportunity and Quote** in SFA under appropriate account/contact

Run SSG to ensure the quoted rate passes.

- If **SSG passes** → (for SSG required hotels only- use Group Pricing Optimization- GPO) Respond to Lead/Inquiry via phone call + proposal, and make appropriate notes in the level 2 activities tab in 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 in the quote

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

- Merge a contract from SFA in the level 2 contracts tab in the quote
  [ensure all rates, cutoff dates; Method of Payment, Cancellations and Reservation method are correct. Ensure any blocked space has also been reserved if applicable].
- **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.
- In the level 2 attachments tab, Sales Manager to upload the Contract
- Turn Booking **T1** in SFA 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

- **Sales Manager Countersigns and dates contract.**
- Turnover to appropriate management for next process [DOS, DOC, GM, etc.]
- **Turnover should ensure all necessary documentation is attached:**
  Signed contract; SSG + approval if applicable; 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.
- **DOS to turn Quote Definite** or leave in T1 status (based on contract terms) in SFA. Ensure the Contract matches information in SFA and the billing is properly marked in the billing tab. Ensure rates and number

of rooms match the contract- and properly netted. Add any activity notes and Marriott Rewarding traces in the Activity Tab on level 2.

- **DOS presents to GM for signature and date.**
- **Full Contract Turnover packet** gets passed to Sales Coordinator/Admin so they can build group into Fosse. Then creates Hard Copy Working File, copies file for Sales Contract Binder, and routes any Credit Authorizations to the Controller.
- **Hard Copy Working File** gets filed in filing cabinet in future Groups under appropriate date.
- **Copy in Sales 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 and sends the countersigned contract and 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 Manager 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 routed to Banquets.
- **BEO's and Group Resumes are created for Staff Meeting no later than 7 days prior to arrival.**

After Group Departure:

- **Once Group Consumes**, Sales Coordinator/Admin/CSM will actualize group and submit any Marriott Rewarding Event Points if applicable. If group is a Letter of Intent, Sales Coordinator/Admin/CSM will turn group DEF and then actualize group and submit any Marriott Rewarding Event Points if applicable.
- File is now complete and can be filed under past Groups.