2021

NAVIS HOSPITALITY CRM

Resorts Reservations User Guide

Libby, Crystal
PEBBLE BEACH COMPANY

Table of Contents

Getting Started

What is NAVIS?

NAVIS is a Customer Resource Management (CRM) program designed to manage relationships between company representatives and clients.

How does Pebble Beach Resorts Reservations use NAVIS?

In conjunction with Springer Miller (SMS), Reservations Agents use NAVIS to manage the experience of each guest starting from their initial phone call and throughout every return visit.

As a **Reservations Agent**, you will use NAVIS to:

- Make and receive calls to and from potential and existing guests
- Document interactions with guests to develop strong relationships
- Track potential sales leads
- Follow up with guests in a timely manner
- Send and receive emails utilizing convenient templates
- Review and analyze your personal sales metrics and milestones

Reservations Managers use NAVIS to:

- Monitor and predict call volume to staff appropriately for high and low seasons
    - Listen to call recordings to provide call scores and plan coaching sessions for agents

Revenue Managers and **Marketing** use NAVIS to:

- See the effectiveness of marketing campaigns
- Monitor booking trends to discover new opportunities to maximize revenue
- Analyze common guest issues and objections to adjust pricing and policies

Additional Resources

NAVIS Articles – Getting Started

NAVIS Best Practices Guide

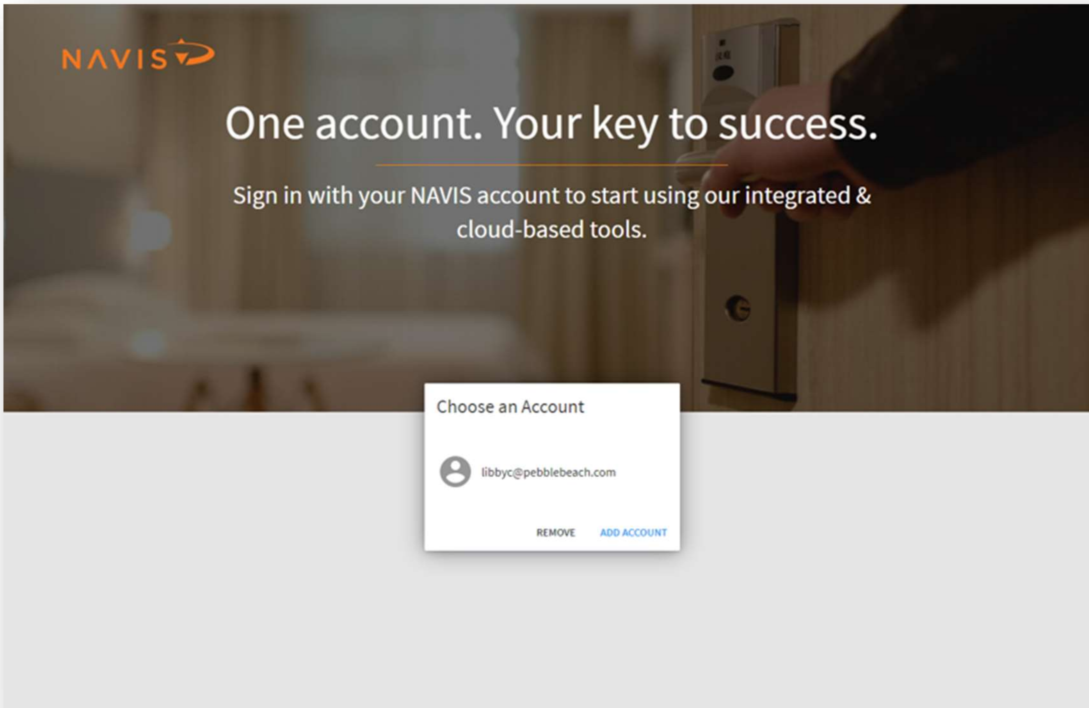
NAVIS Help Center

NAVIS University

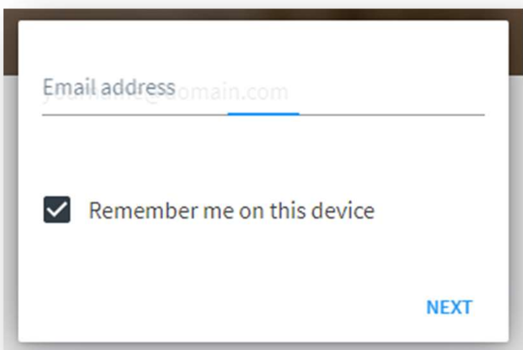
Logging In

Once your Reservations Center Manager has created your NAVIS account:

- Access the login page at www.hub.navisperformance.com
- Click the blue link to "Add Account."



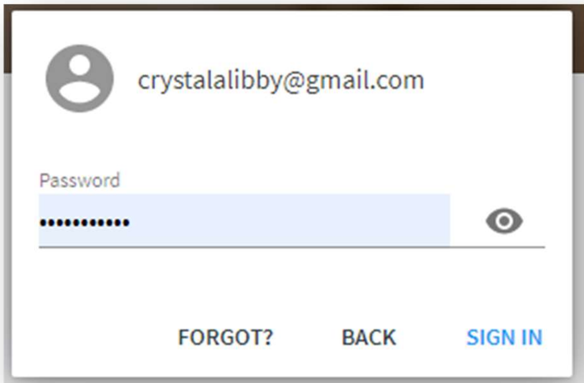
Pop Up Window #1:

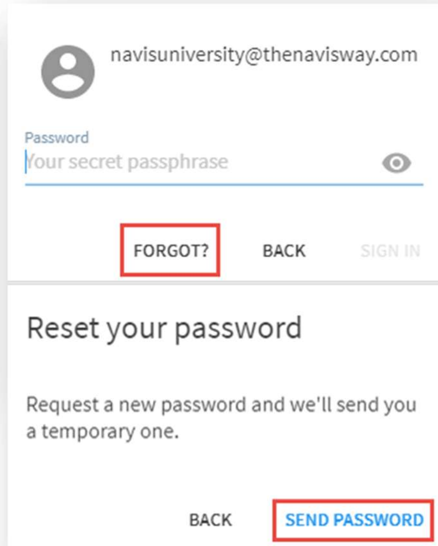


- Type your Pebble Beach Company *email address* into the email field
- Check the box that states, "Remember me on this device."

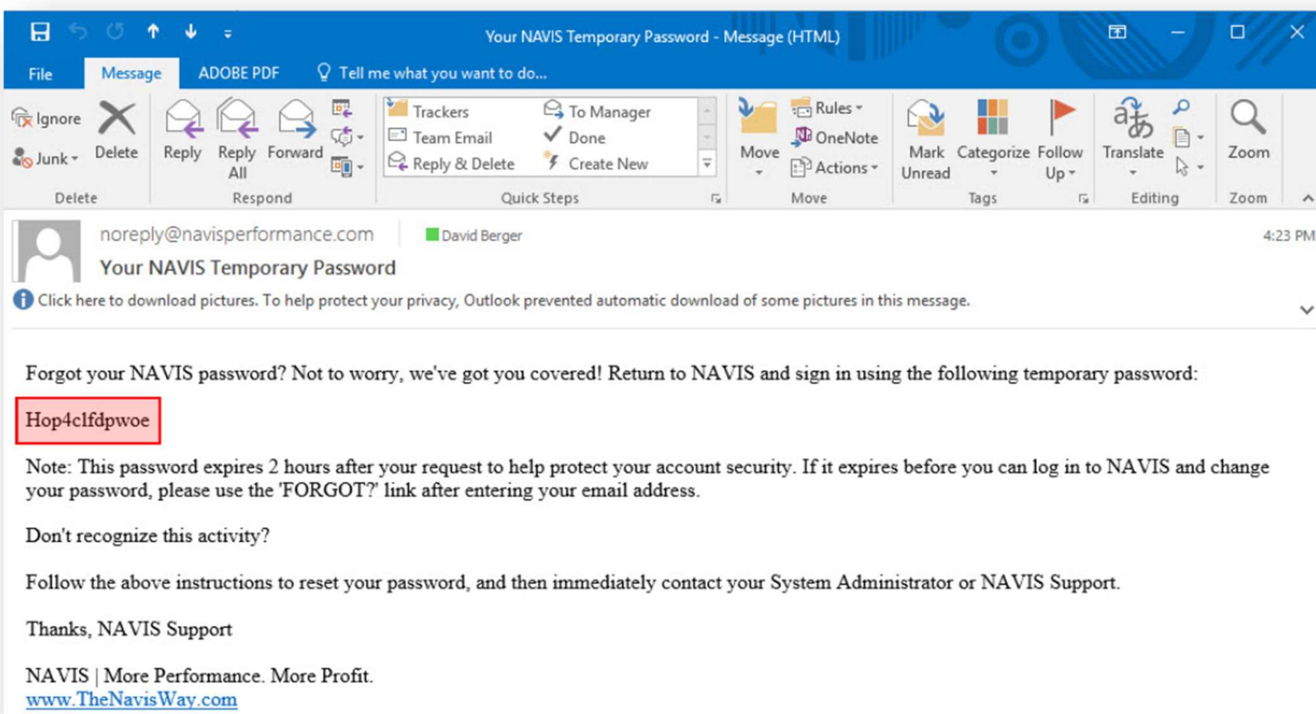
Pop Up Window #2:

The first time you log in, you will need to click "FORGOT" to receive a temporary password. Click "SEND PASSWORD" to trigger this password to be sent to your outlook email address.





This is what your temporary password email will look like:



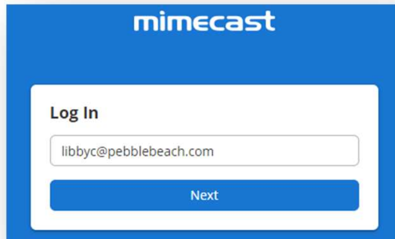
Not receiving your NAVIS Temporary Password Email?

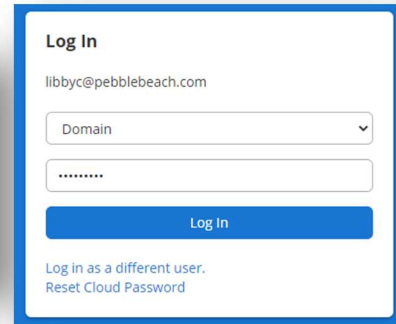
Your Outlook may be blocking these emails from reaching your inbox.

Visit www.login.mimecast.com

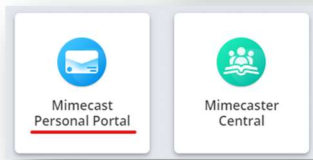
Type in your email address and click Next.

Enter your Outlook password and click Login.

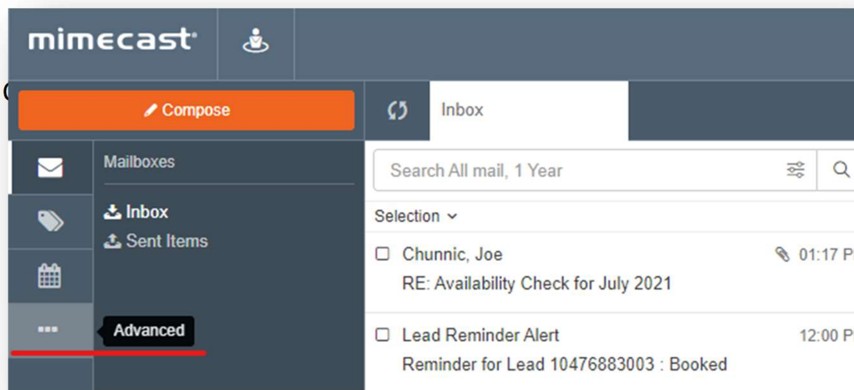




Click **Mimecast Personal Portal**.

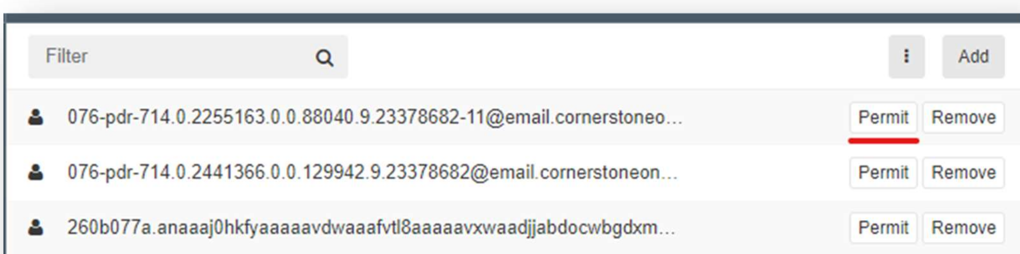


An inbox similar to your Outlook inbox will open. Click the three dots on the left side menu.



This will pull up all emails that are being blocked from reaching your inbox.

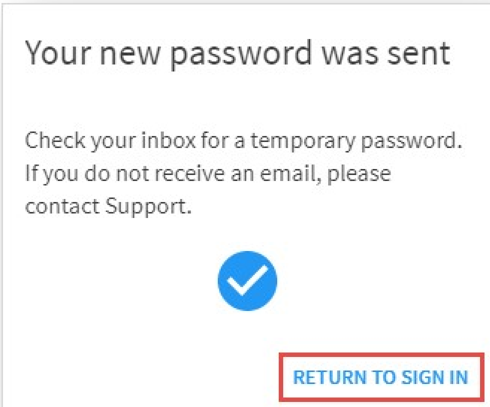
If you see your NAVIS temporary password email, click **Permit** on the right side of the window.

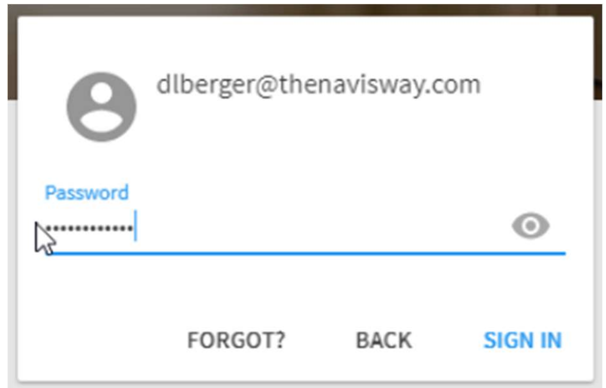


This email will now be sent to your Outlook inbox.

Pop Up Window #4

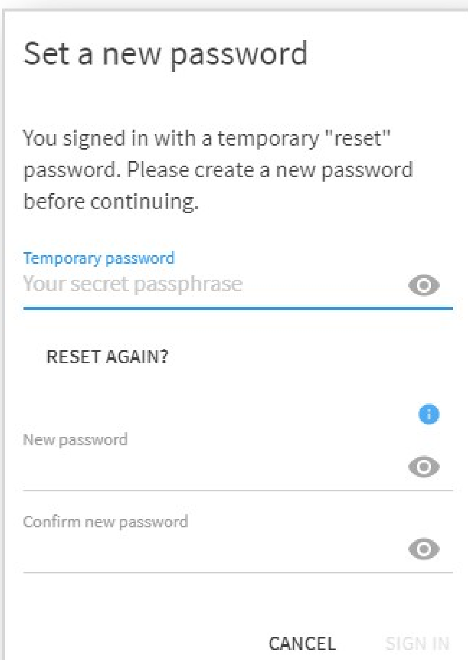
Once you've received the temporary password, click on "Return to Sign In" and enter the temporary password.





Pop Up Window #5:

After signing in with your temporary password, you will be prompted to create a new permanent password for future logins:



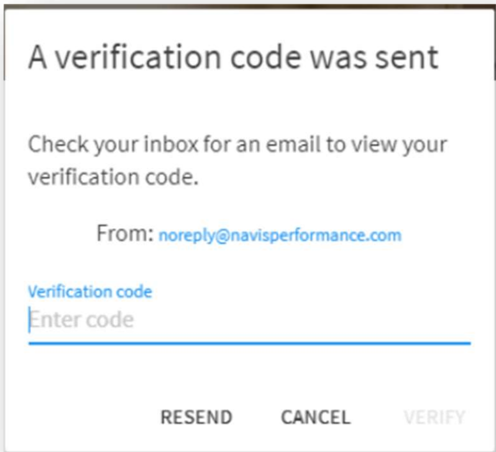
Enter the temporary password again on the first line.

Your new password must be at least 10 characters long.

They also must include three of the following:

a. Upper and/or lower-case letters
b. Numerals
c. Special characters

Once you have entered your passwords, click "Sign In"



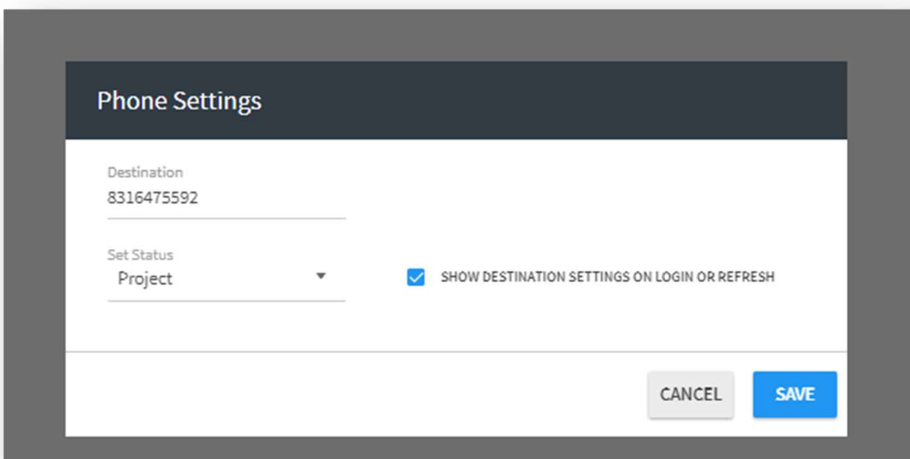
Your NAVIS sign-in credentials are now set.

The next time you log in, you will only be prompted to enter your email address and password.

For added security, the next time you sign in, you may also be prompted to enter a six-digit verification code.

This code is also sent via email to your Outlook.

Pop Up Window #6



You are now in the NAVIS Hub, and will immediately be prompted to set your "Phone Settings":

Destination	Verify that this phone number matches the number you see on your desk phone. Since you cannot log into NAVIS from any work station, NAVIS must know which phone to deliver incoming phone calls.
Set Status	This setting should default to "Project" and remain this way. If you switch to "Ready" when you first log in, new calls will come through your phone immediately upon logging in.

Click "**Save**" to access the main Hub of NAVIS.

The Hub

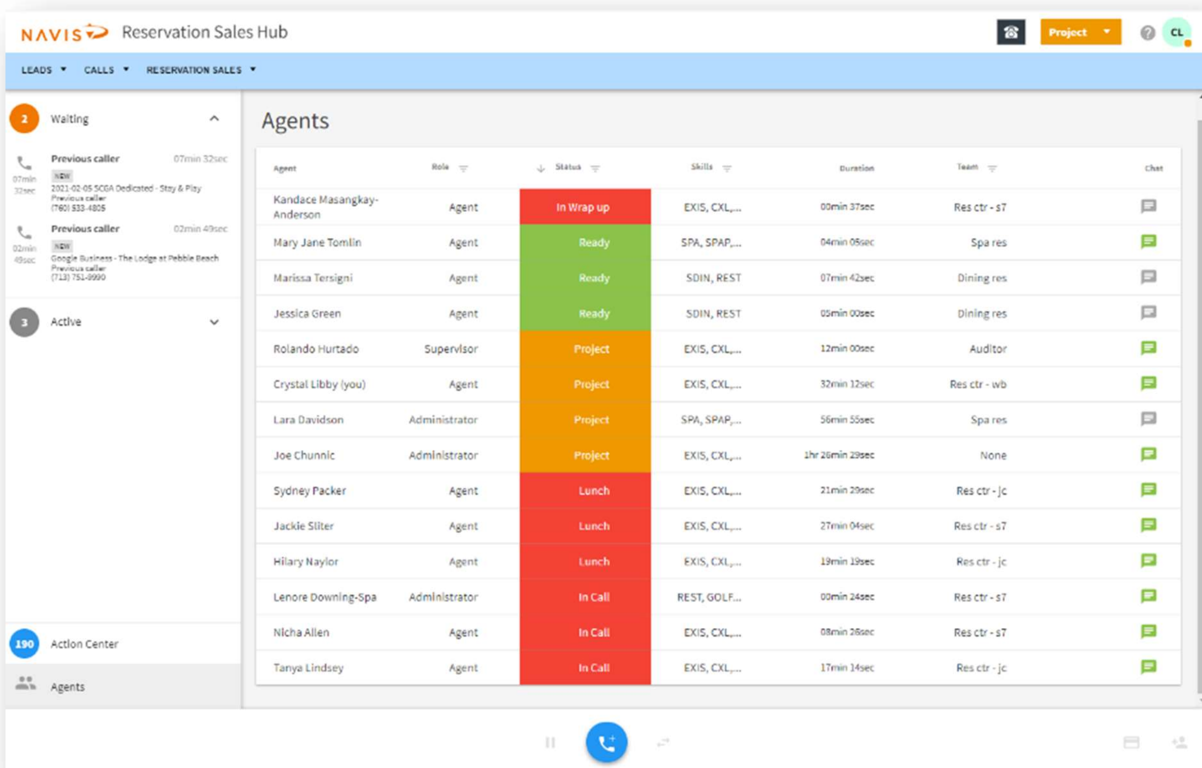
Each morning as you begin your work day, you will need to open several programs:

1. **SMS Booking Center**
2. **Outlook**
3. **Digital Binder**
4. **NAVIS Hub**
5. **NAVIS Chat**

The **NAVIS HUB** is the landing page that will be your home base along with the SMS Booking Center.

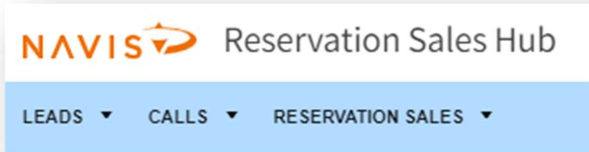
The HUB is where you will:

- Receive and make phone calls
- See the status of other agents
- See how many guests are waiting to speak with agents
- Manage your ongoing conversations with guests



Toolbar

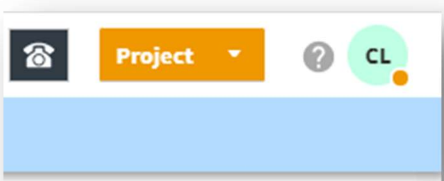
The **Toolbar** in the top left corner of The Hub hosts a series of dropdowns:

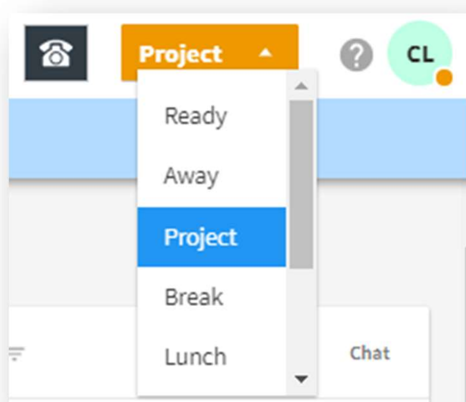


Leads	This is where you will search for and create "Leads"
Calls	This is where you will search for call recordings and call statistics
Reservation Sales	This is where you will see all your personal statistics as an agent

Agent Status

In the top right corner of The Hub, you will see a colored box with your current "Status." This box features a dropdown menu that allows you to change your status.





Status Definitions

Your NAVIS Status indicates to your teammates and managers what you are currently working on and whether you are available to receive calls.

Each status is color coded:

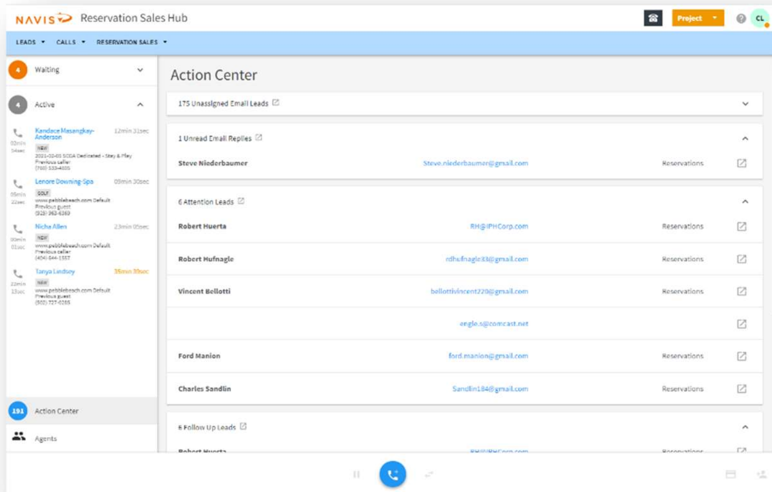
Green	You are available to receive any calls
Red	You are not available for incoming calls, nor are you available to have calls placed on hold for you
Orange	You are not available for incoming calls from guests, but other Reservation Agents can place a call on hold for you

Ready	You are ready to begin receiving inbound calls from guests
In Call	You are currently on the phone with a guest
In Wrap up	You have completed a call with a guest and are working on finishing a booking or resolving an issue
Meeting	You are in a meeting. You will enter this status every day for the daily "Team Huddle" where we discuss updates, issues, and announcements
Lunch	You are on your lunch break
Break	You are taking one of your two daily 10-minute breaks
Coaching	You are in a regularly scheduled coaching meeting with a supervisor or manager to discuss performance and areas for improvement.
Project	You are taking uninterrupted time to work on projects. This time is prescheduled by your supervisor at designated times each week.
Training	You are currently participating in a Pebble Beach training.

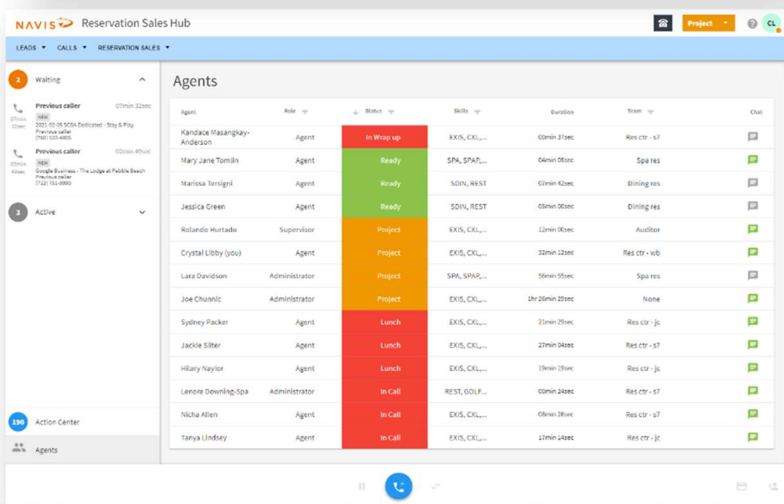
Hub Views

The Hub has two primary Views:

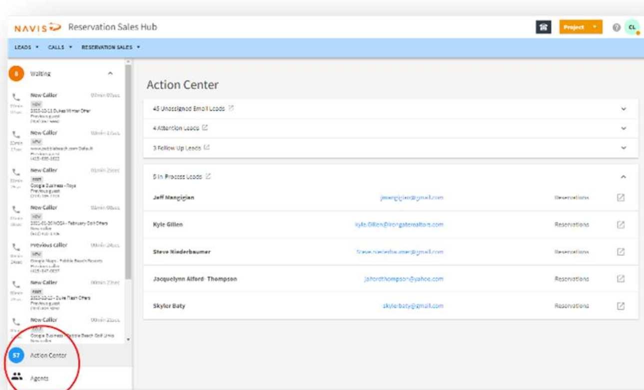
1. **Action Center**

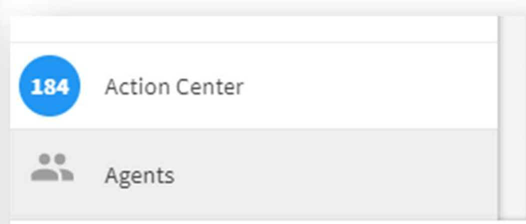


2. **Agents**



To select which view you want to see, click the preferred option from the bottom left corner of the hub:

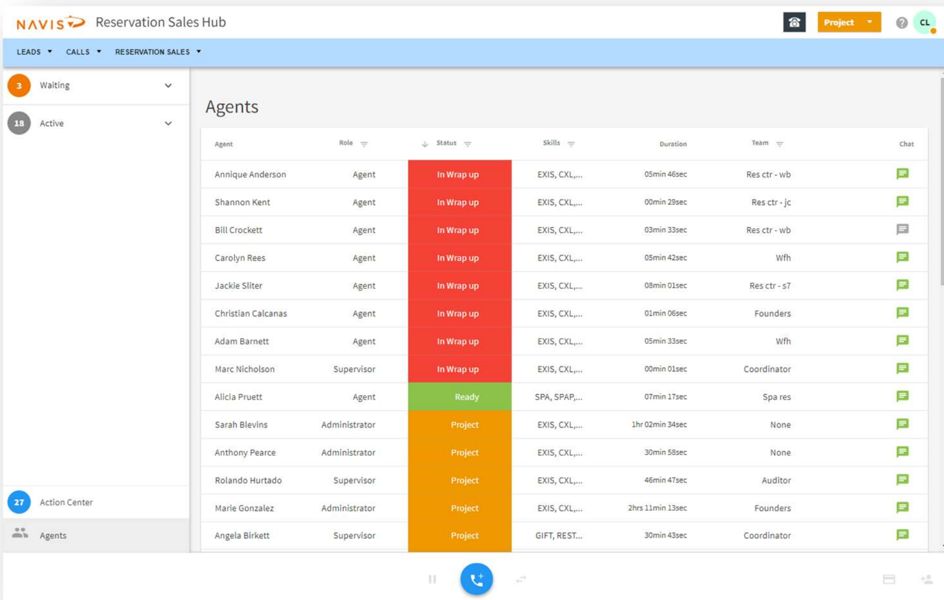


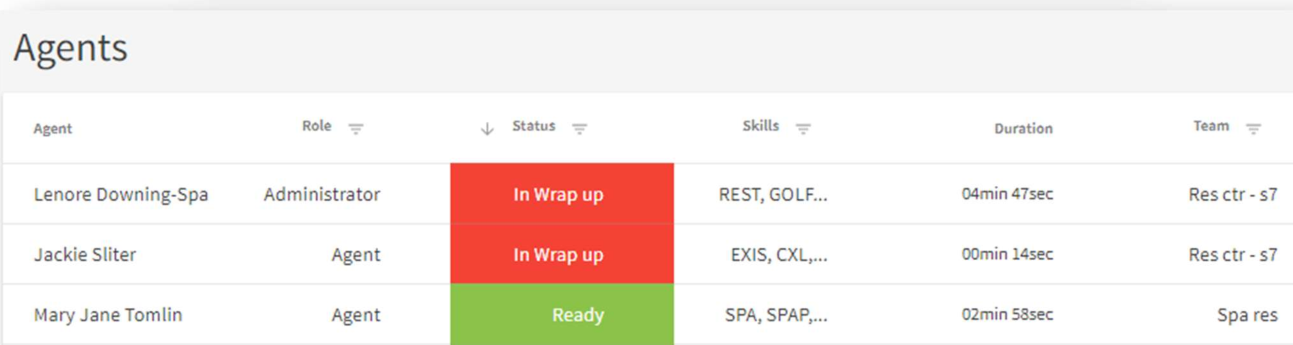


Agents Screen Features

The Agents view will be your default in The Hub.

From this view, you can see every agent currently logged into NAVIS as well as their current status.





Columns 1 & 2:

list the Agent's name and their "Role" in NAVIS. The "Role" indicates the level of access they have within the NAVIS program:

Agent	Role
Samantha Cornelison	Agent
Sarah Blevins	Administrator
Anthony Pearce	Administrator
Rolando Hurtado	Supervisor

Agent	All Resort Reservation Agents have this basic access
Supervisor	All Coordinators and Auditors have a slightly higher level of access to enable them to perform their duties
Administrator	All Reservation Center Supervisors and Managers have full access to NAVIS

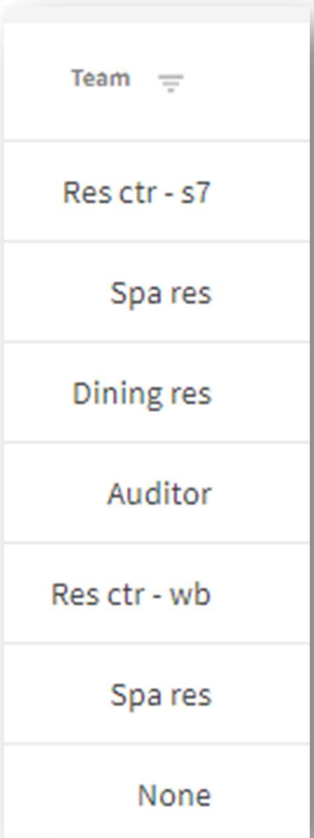
Columns 3 & 4:

Status	Skills	Duration
In Wrap up	SDIN, REST	02min 10sec
Ready	REST, GOLF...	03min 20sec

Status	The current status of each agent
Skills	Which types of calls each agent can accept
Duration	How long each agent has been in their current status

Columns 5:

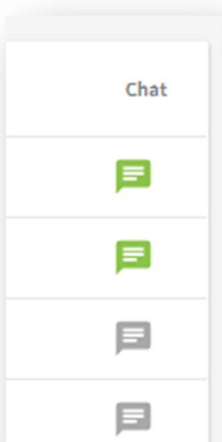
Each reservations agent is assigned to a specific "Team" that is lead by one supervisor. The teams field is coded as follows:

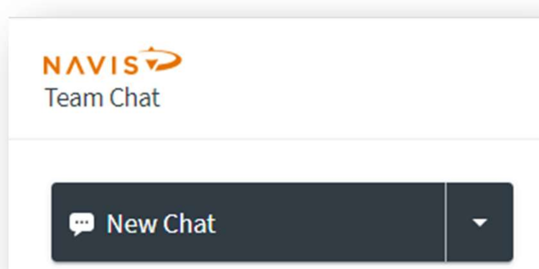


Wfh	Work from home
Res ctr –XX (Sup. SMS Initials)	Agent works in the Reservation Center office and is on the team of the corresponding supervisor
Founders	Agent works in Founders office next to Spyglass Hill Golf Course
Coordinator	Training Coordinator or Business Development Coordinator
Auditor	Auditor of existing reservations
Dining res	Agent is designated to a special team solely focused on restaurant reservations
Spa res	Agent is designated to a special team solely focused on spa reservations
None	Supervisors and Managers

Column 6:

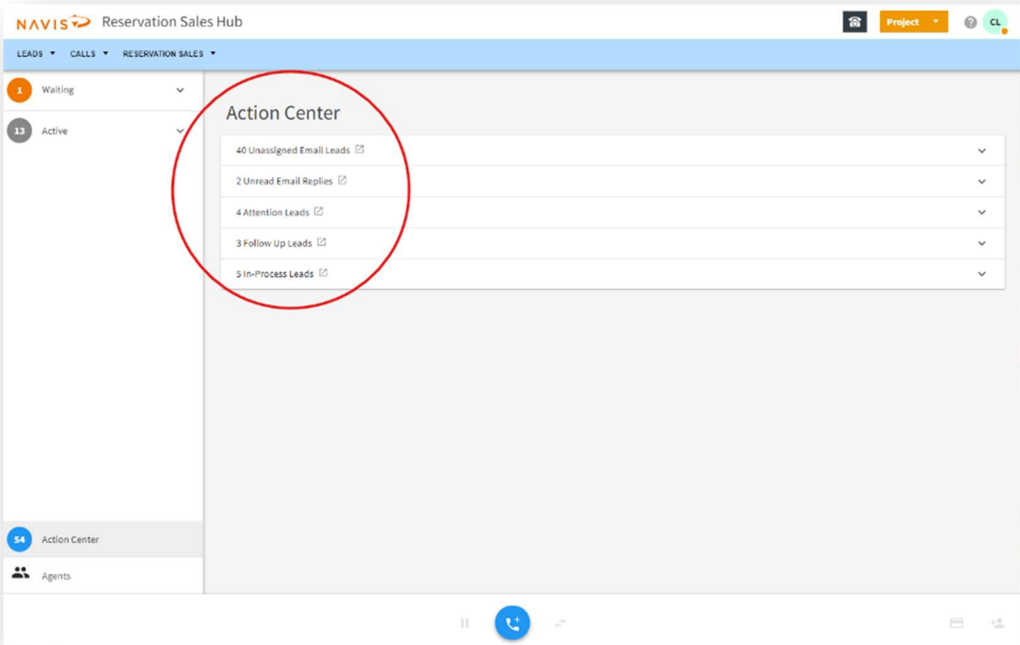
The speech bubble in the final column is a button that will open a private chat with each agent in a new tab of your browser. Please see the {Link to chat section} for more details on this feature.



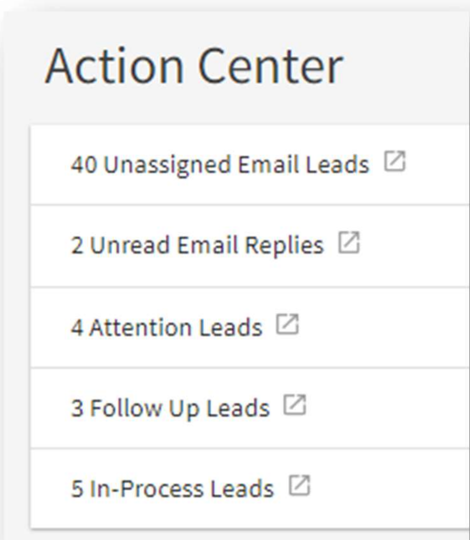


Action Center Features

The Action Center is the To-Do List of NAVIS.



The Action Center hosts several drop-down menus that you can expand to see outstanding tasks that you are currently working on or need to be addressed.



As you can see, many of the items in the Action Center are to bring your attention to various types of "**Leads**."

A Lead Form is a form you fill out during calls to track information about your callers.

We will go into detail about each one of these Action Center categories in the "Leads" section of this manual.

Logging Out

One of the metrics NAVIS maintains is the amount of time each agent spends in any given status. This is intended to maintain a balanced schedule between agents and ensure that the entire reservations team is spending enough time covering live calls while also keeping up on projects such as outreach calls and follow ups. It is important to fully log out of NAVIS at the end of each day to keep your Agent Statistics accurate.

For example, if an agent does not log out of NAVIS, their project time metric will keep counting overnight. At the end of the month or quarter, when metrics are pulled by management, that agent's statistics will reflect that they spent a significantly higher percentage of their time in Project than their coworkers.

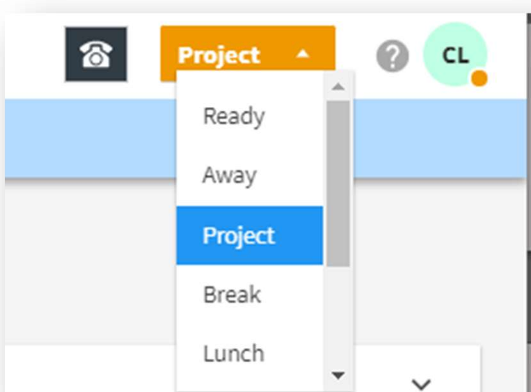
To a manager who does not know this status was left overnight by mistake, this may appear that:

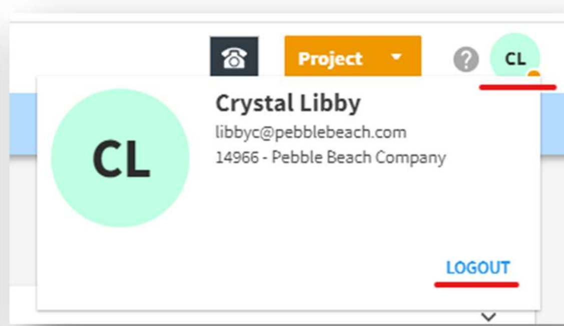
1. The agent has been neglecting the call queue
2. The agent is overly inundated with project work and unable to complete it in the same allotted time as the rest of their team
3. The agent is improperly using their Project status, such as setting themselves in project when they go to Lunch instead of using the Lunch status.

How to Log Out

1. Use the dropdown in the top right corner to change your status from "Ready" to Project.
2. Click on your initials in the top right corner
3. Click "Logout"

   *You will automatically be logged out of NAVIS chat as well as The Hub

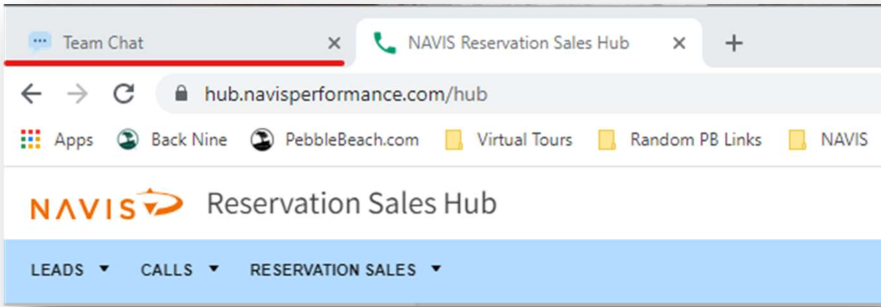




Chat

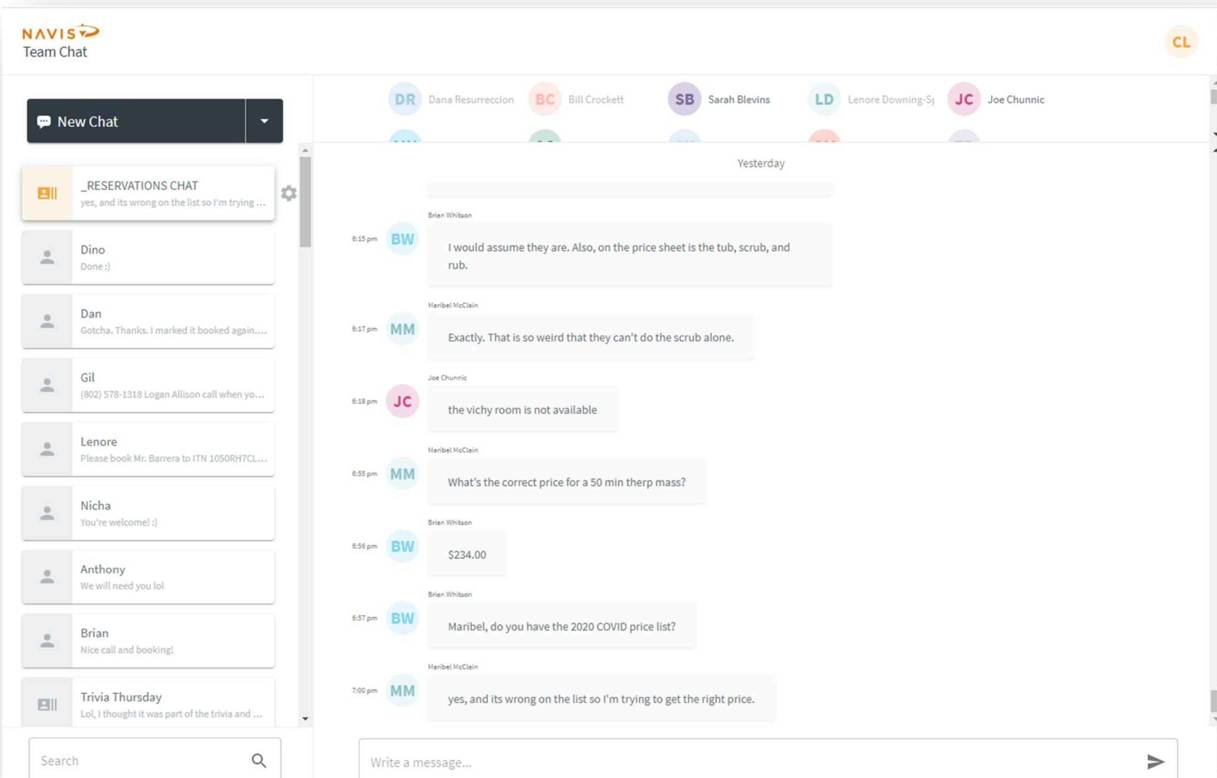
Every morning, each Reservations Agent should have two browser tabs open:

- NAVIS Hub
- NAVIS Chat



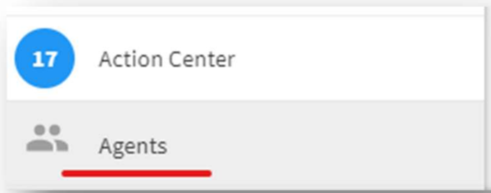
The **Team Chat** feature of NAVIS allows the Reservations Team to communicate with each other via Instant Message.

Any user logged into the Hub can utilize the team chat. The chat feature can also be used to contact the **NAVIS Support team**.

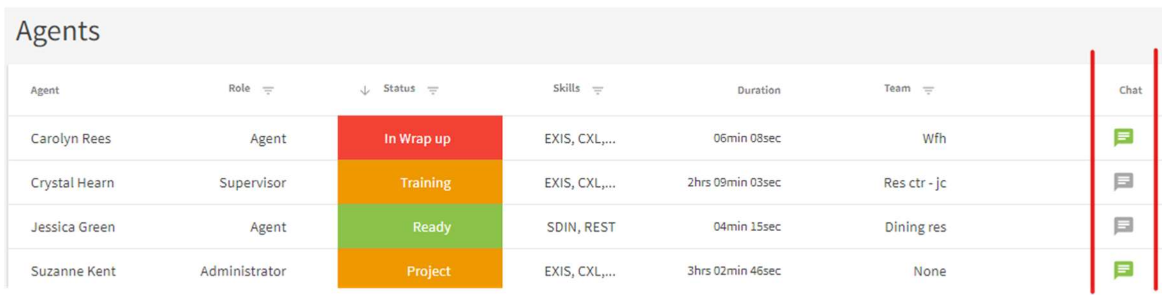


Access the Chat

To access the Chat, you must first be logged into NAVIS.
Navigate to the "Agents" page of The Hub by clicking "Agents" in the bottom left corner:

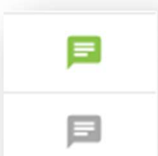


On the agents page, you will see the list of each agent currently logged into NAVIS.
The final column along the right side of this page is labeled "**Chat**"


Agents

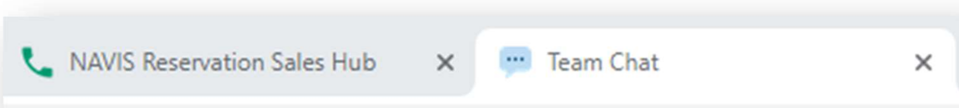
Agent	Role	Status	Skills	Duration	Team	Chat
Carolyn Rees	Agent	In Wrap up	EXIS, CXL,...	06min 08sec	Wfh	
Crystal Hearn	Supervisor	Training	EXIS, CXL,...	2hrs 09min 03sec	Res ctr - jc	
Jessica Green	Agent	Ready	SDIN, REST	04min 15sec	Dining res	
Suzanne Kent	Administrator	Project	EXIS, CXL,...	3hrs 02min 46sec	None	

You will see speech bubbles in this column for every agent"



- The **GREEN** speech bubble means that agent is currently logged into the chat feature.
- The **GRAY** speech bubble means they are logged into NAVIS, but not the Chat.

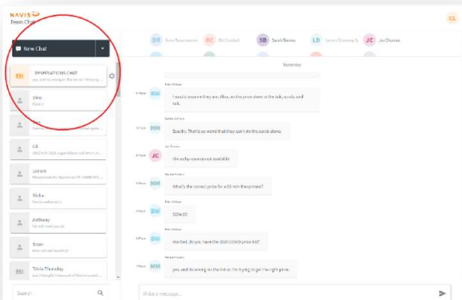
To log into the Chat yourself, you can click any one of these speech bubbles. The chat window will open for you in a new tab of your browser.

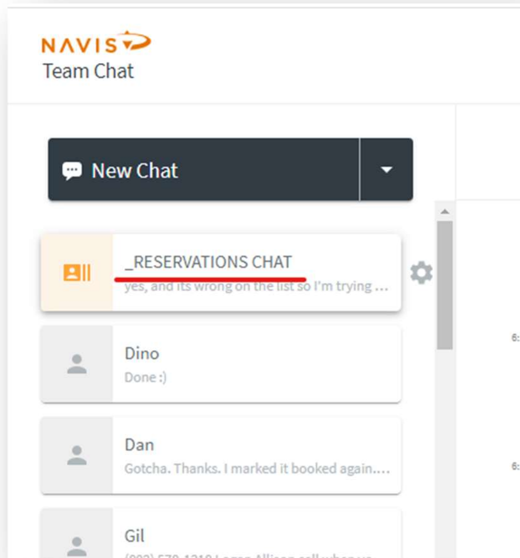


All reservations agents should open their chat in a new tab as soon as they log into NAVIS for the day.

Reservations Team Chat

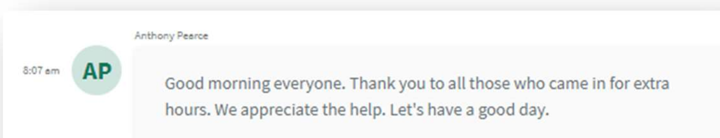
The column along the left side of the Chat window will list the name of every agent you have opened a chat with. If this is your first time using the Chat, the only name you will see in this column is "_RESERVATIONS CHAT."

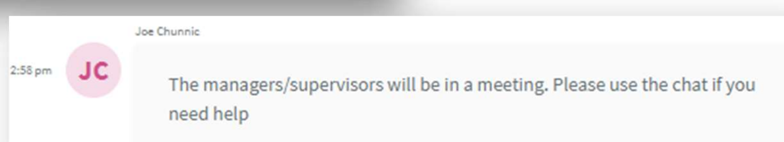




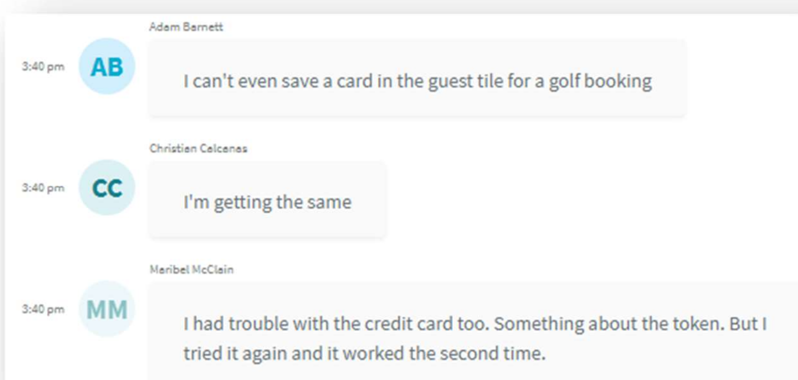
_RESERVATIONS CHAT is the Reservation Center's Group Chat. Each day, *this chat is used for quick* communications to the entire team.

You will most commonly see supervisors and managers sending messages and asking questions to the team at large in this chat.





It is also a common for agents to report system issues with SMS or NAVIS to see if the issue is localized to them personally or if all agents are experiencing an outage.



Individual Agent Chats

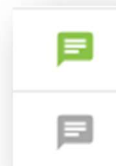
In addition to the Group Chat, you can hold private chats with individual agents throughout the day.

The <u>most common use for a private chat</u> conversation is when one reservations agent receives a call from a guest who asks to speak with a specific agent with whom they have an existing relationship.

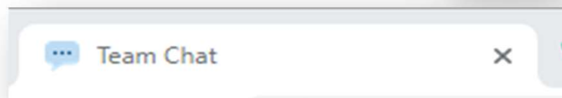
If you are the agent who receives that call, you will:

1. Access the Agents tab of NAVIS.

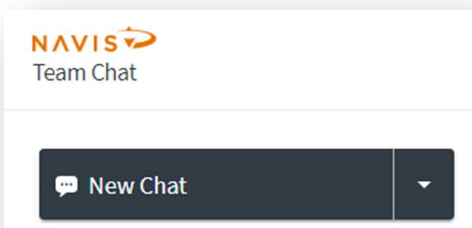
2. Check the speech bubble icon next to the agent's name with whom the caller wants to speak and make sure their speech bubble icon is green – indicating that this agent is logged into chat.



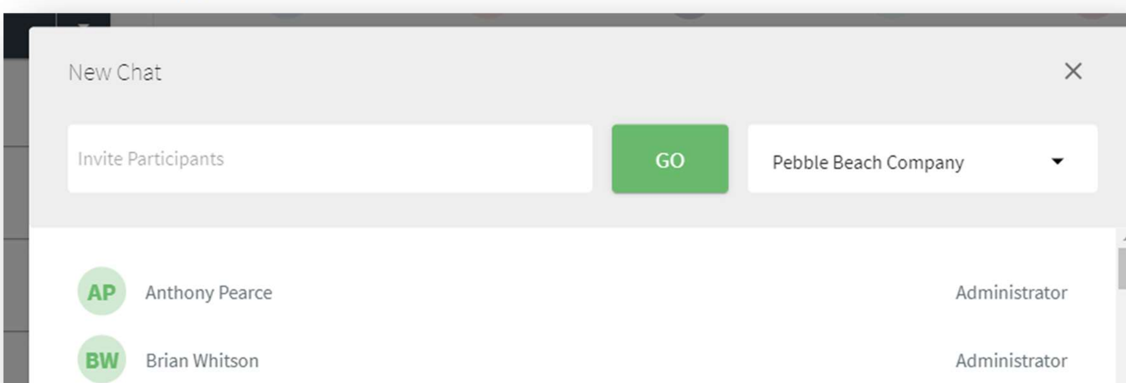
3. Click the Team Chat tab of your browser



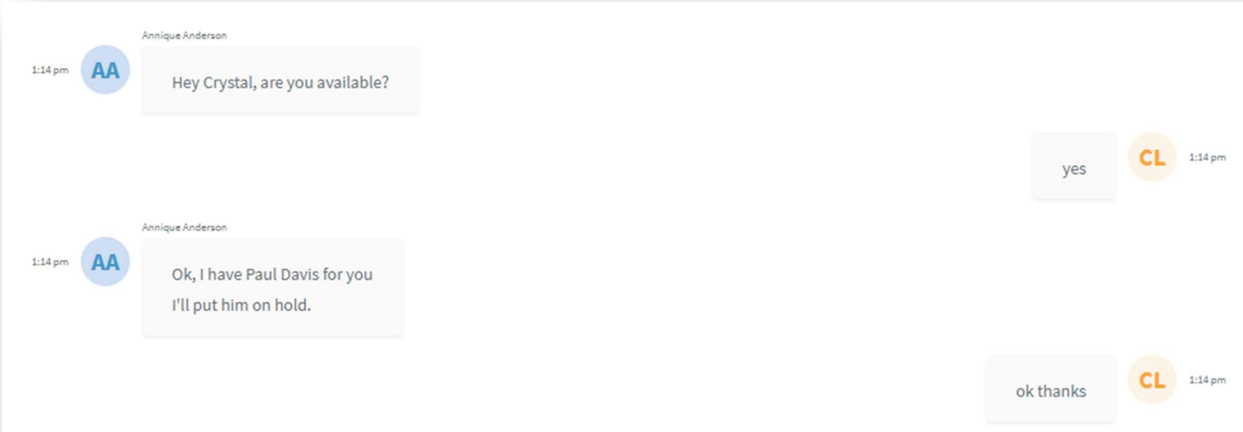
4. Click "New Chat" in the top left corner.



5. This will pull up a search window where you can type the name of the agent you want to speak with – or simply scroll down the list and click on their name.



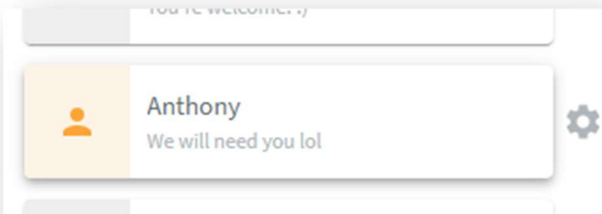
6. A private chat with that selected agent will open.



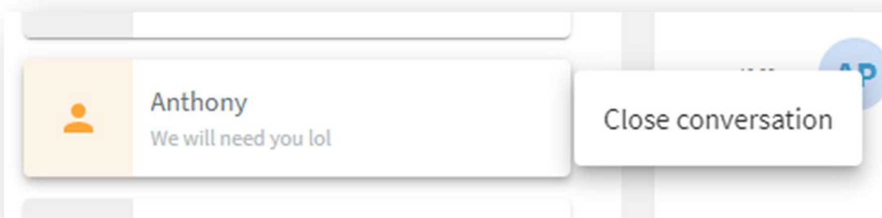
Once you have created an individual chat with an agent, their name will always be present along the left column of your chat window. This is for easy access in the event you need to continue that conversation later.

You can leave these chats open indefinitely, but if you wish to **close a chat:**

- Click on the name of that agent and a gear will appear:



- Click the gear and select the option to "Close Conversation"

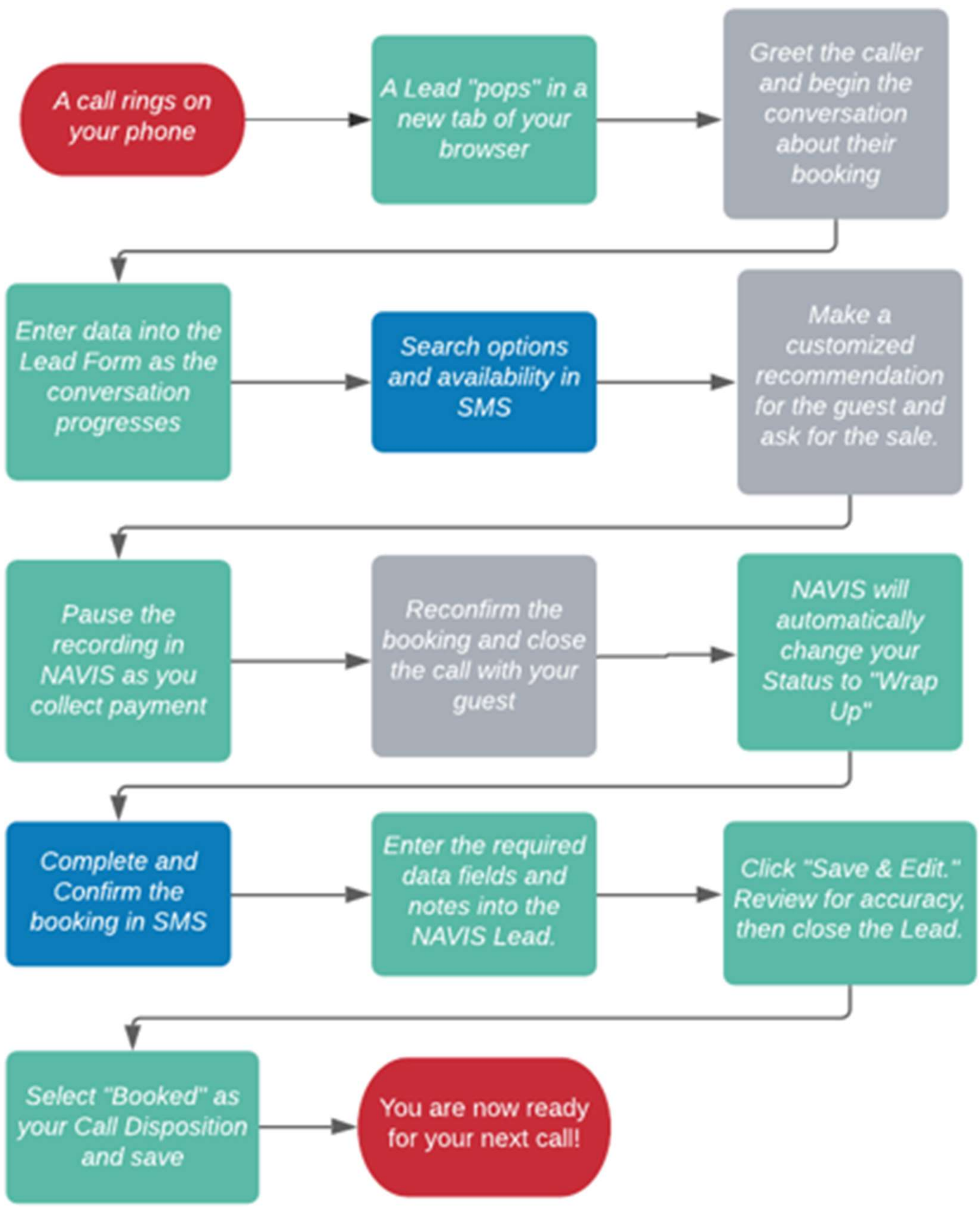


This agent's name will now be removed from your list of chats.

Phone Calls

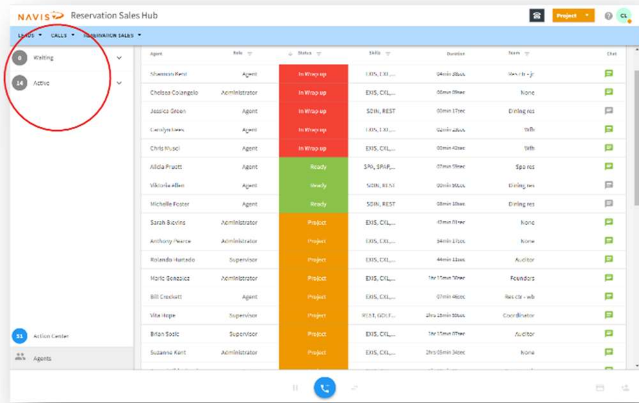
Your primary role as Reservations Agent is to accept incoming phone calls. To truly prepare to sell to guests, you will need to understand how to utilize all tools for your job while on the phone.

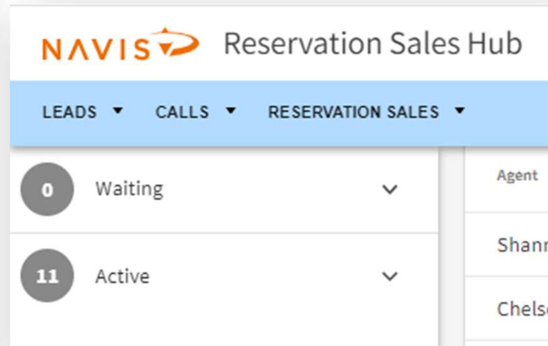
The chart below is a **Call Flow example for a Booked Call** to give you an idea of how NAVIS is utilized in conjunction with SMS throughout your conversations with guests.



Call Queues & In Process Calls

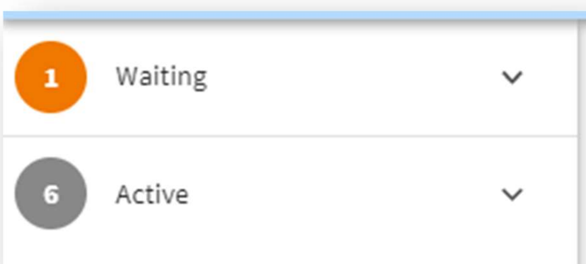
On the left side of The Hub, you will see a sidebar with two expandable sections: **Waiting** and **Active**

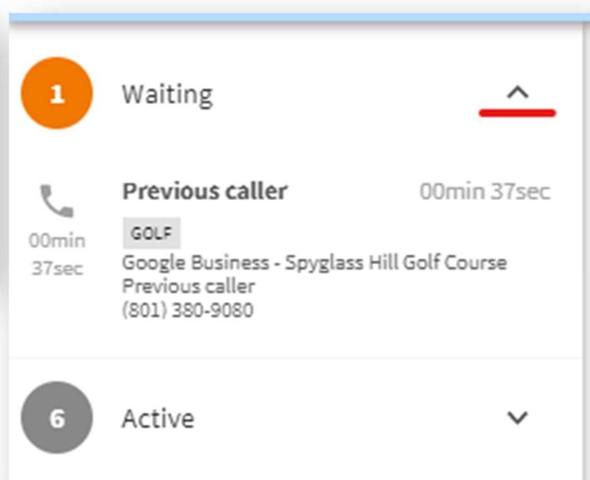




The “Waiting” and “Active” sections of the Hub can be expanded to see current calls in those categories.

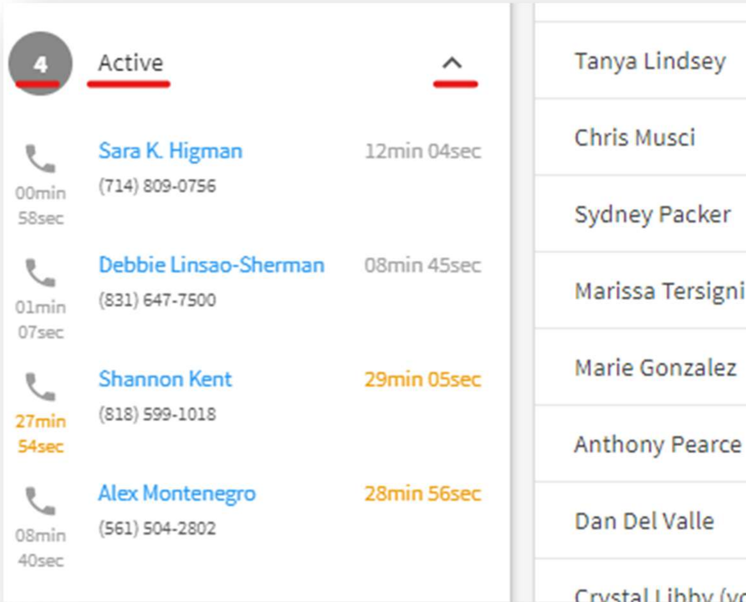
- To expand the contents, click the arrows to the right of each section header.
- Only one of these sections can be expanded at a time.





Active Menu

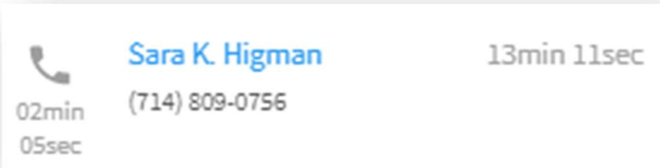
The **Active** section of the Hub is where you will see information for every Reservations Agent who is currently on the phone with a guest.



For each Active Call, you can see:

- The agent's name
- How long the guest has been on the phone with Pebble Beach
- How long the Reservations Agent has been speaking to the guest

What do we know based on this Active call?



Agent Name	Sarah K. Higman
How long the guest has been on the phone with Pebble Beach	13 minutes, 11 seconds • This time is counted from the moment they dial a Pebble Beach phone number.
How long the guest has been speaking with this agent	2 minutes, 5 seconds • This time is counted from the moment the agent receives the call • The difference between this time and the total time on the phone becomes more significant If the guest has been transferred from another department or has been on hold waiting for an agent to be available

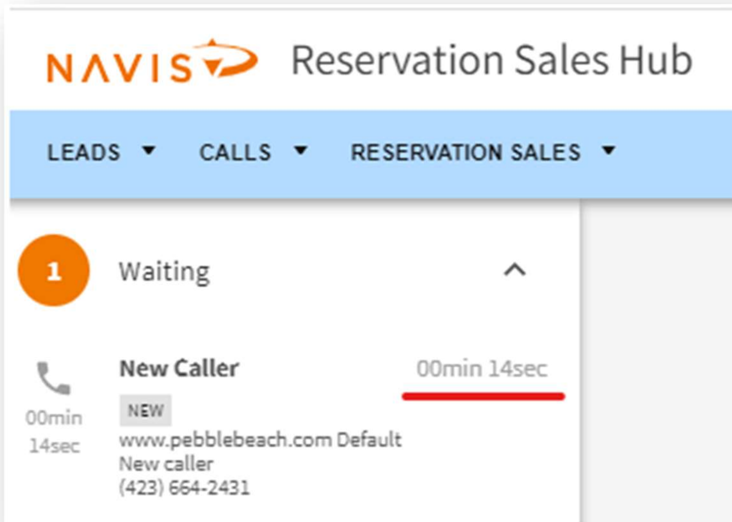
Waiting Menu

The Waiting section of The Hub shows all calls that are currently in queue to be answered by Reservations Agents.

As a Pebble Beach Resorts Reservations Agent, one of the ways we provide outstanding service to guests is by ensuring that no caller is left waiting on hold for a significant amount of time. To manage this hold time, it is important to keep an eye on this section of The Hub throughout your day.

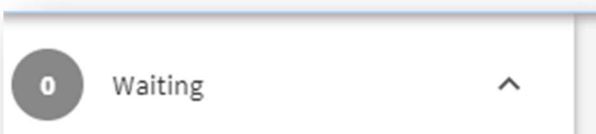
This caller at the top of the Waiting list will be next in line for a Reservations Agent.

In this image, you can see that a caller has been waiting on hold for 14 seconds.

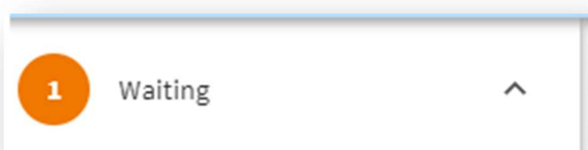


The number next to the word "Waiting" will display the number of calls currently in the queue.

If there are no calls, the circle will be gray:



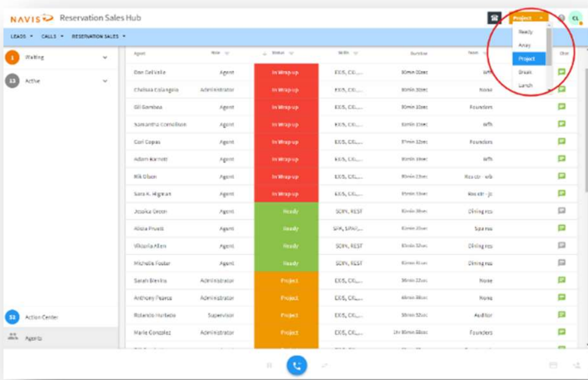
If there are any calls waiting for an agent, this circle will turn **orange** to capture our attention:

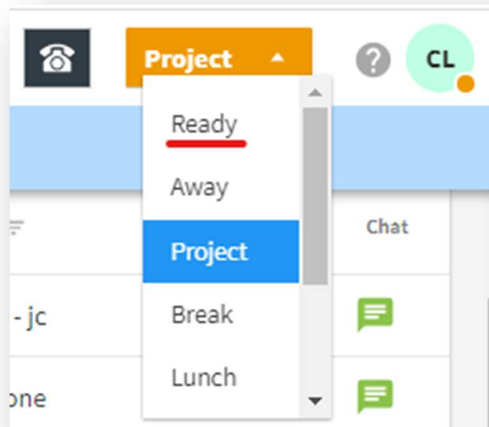


Receive an Inbound Call

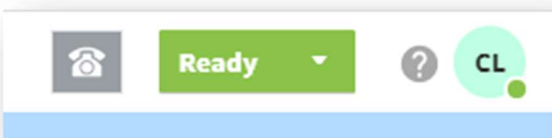
When you are ready to take your first call, change your status to **Ready** by using the dropdown menu in the top right corner of The Hub

**Be sure you are in fact ready to take your first call before clicking "Ready." If there are any calls waiting in the queue when you change to this status, your phone will ring immediately.*

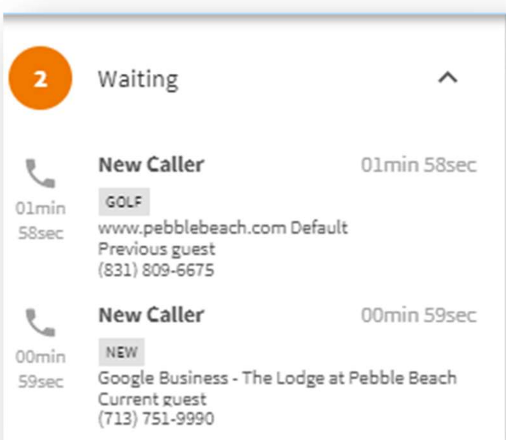




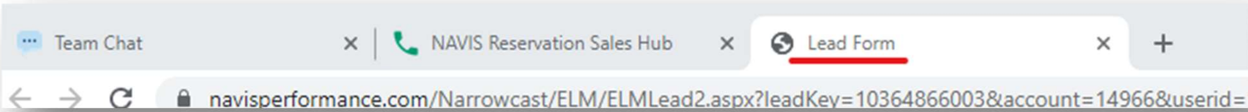
Once you switch your status, the box in the corner will change color to **green**:



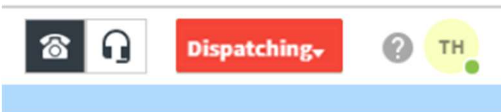
If there are calls in the "Waiting" queue, your phone will ring immediately with the caller who has been on hold the longest.



As soon as a call comes through NAVIS, a new tab will open in your browser with the “Lead” for that call.



Simultaneously, the call will “Dispatch” to your desk phone, causing your phone to ring



You have three rings to answer your call, so before you answer, take a moment to quickly scan the Lead for vital information, such as:

- The guest’s name
- An Itinerary number *(If available, lookup the Itinerary in SMS while you greet the caller)*
- Notes from other agents

To answer the phone call:

- Put on your headset
- Press the “**HEADSET**” button on your desk phone. The light should turn red.

  The headset button is circled in the phone image to the right

- Greet the caller with our standard Reservations Agent greeting

“Thank you for calling Pebble Beach Resort Reservations.

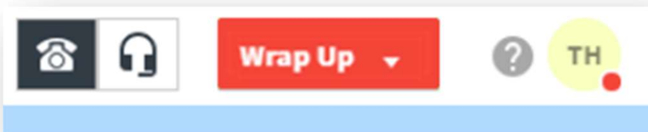
My name is ___________. May I have your first and last name, please?”

End a Phone Call

To end a phone call with a guest, simply press the “**HEADSET**” button on your desk phone.

The red light should turn off.

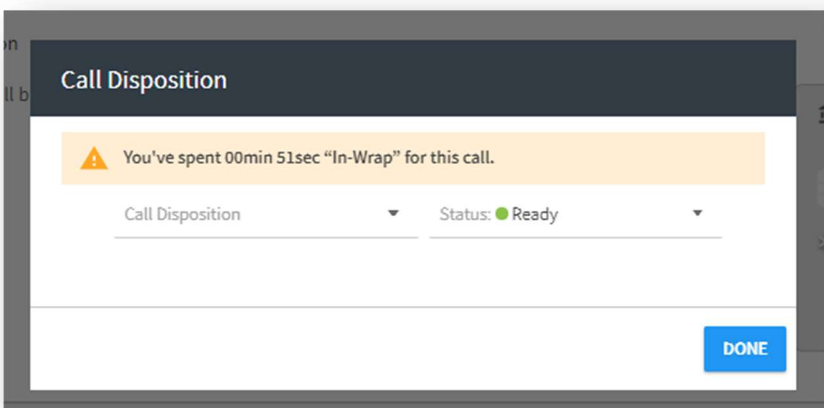
NAVIS will automatically change your status from “In Call” to “Wrap Up”



Use your Wrap Up time to take care of any SMS and NAVIS work you need to do for your guest before you proceed to the next caller.

Once you have completed your wrap up work, close out of your Lead tab in your browser and return to the NAVIS Hub

You will see a pop-up box on The Hub prompting you to select your “Disposition”



Select the appropriate disposition for your call

Unless you are heading into a break, lunch, or scheduled project hour, leave the “Status” as **Ready.**

Click “DONE.”

**Please see the Leads and Dispositions sections of this manual for expansions on these topics.*

Call Recording Disclaimer

Inbound Call Recording Disclaimer

When guests call into Pebble Beach Resorts, the automated phone system issues a disclaimer at the beginning of their call to inform guests of the following:

"This call may be recorded for quality assurance."

Quality Assurance refers to several things:

- Recorded calls can be used as examples to train new agents
- Managers and Supervisors review calls to provide Call Scoring as a method of performance improvement
- When issues arise with a guest's reservation, supervisors and managers can listen to calls to better understand the situation.

Outbound Call Recording Disclaimer

When we dial *out* to guests, however, our phone system does not provide this disclaimer.

Therefore, it is the responsibility of the Reservations Agent to inform each guest that they are speaking on a recorded line.

"Hello! This is __________ calling from Pebble Beach Resorts on a recorded line.

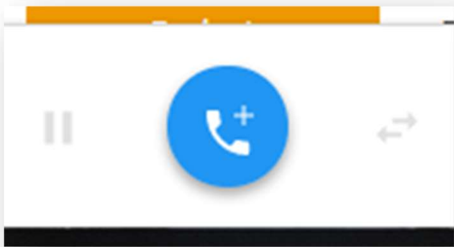
May I speak with ______?"

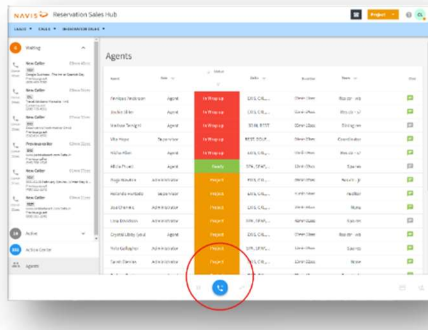
Fortunately, NAVIS helps agents remember to provide this disclaimer by reminding each agent to do so as soon as they dial an outbound phone number. Upon hitting the call button in NAVIS, the following message will play: "*Please inform the called party that this call is being recorded for quality assurance.*"

Place an Outbound Call from The Hub

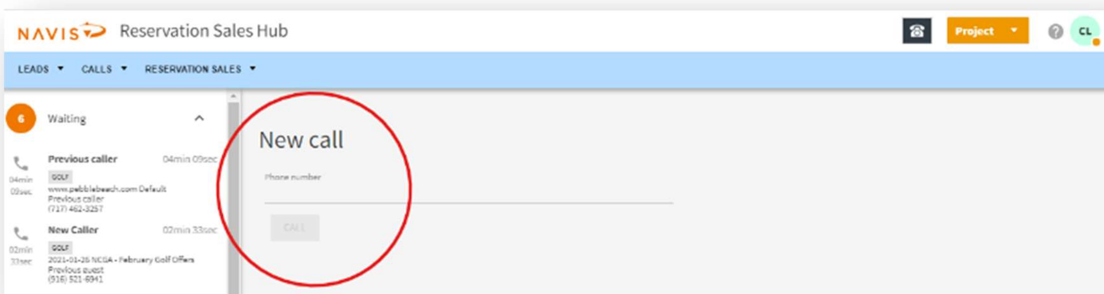
In order to place an outbound call, you should switch your status to Project. This will prevent any new calls in the queue from coming through to your phone.

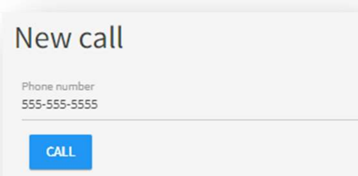
Along the bottom of The Hub, regardless whether you are in Agent View or the Action Center, you will see a blue button with a phone icon and a plus sign.





When you press the phone button, you will see a "**New call**" field appear which is where you will enter your outbound phone number.





Once a full ten-digit phone number has been typed into this field, the "CALL" button will turn blue.

Press this blue button to make your call to the phone number you have entered.

You phone desk phone will now ring.

To accept the outbound call, press the "**HEADSET**" button on your desk phone.

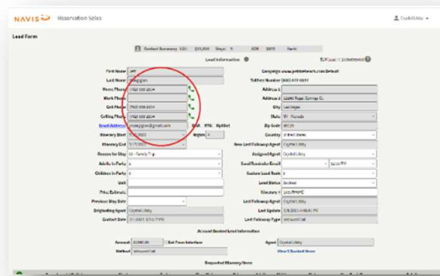
You will then hear the disclaimer, *"Please inform the called party that this call is being recorded for quality assurance,"* just before the phone call connects.

Place an Outbound Call from A Lead

In order to place an outbound call, you should switch your status to Project. This will prevent any new calls in the queue from coming through to your phone.

On a NAVIS Lead, you will see a section of data fields where you can save multiple guest phone numbers.

To the right of each phone number field, you will see a **green** phone icon. Press this button to begin an outbound call to that specific phone number.



You phone desk phone will now ring.

To accept the outbound call, press the "**HEADSET**" button on your desk phone.

You will then hear the disclaimer, *"Please inform the called party that this call is being recorded for quality assurance,"* just before the phone call connects.

Outbound Call Errors

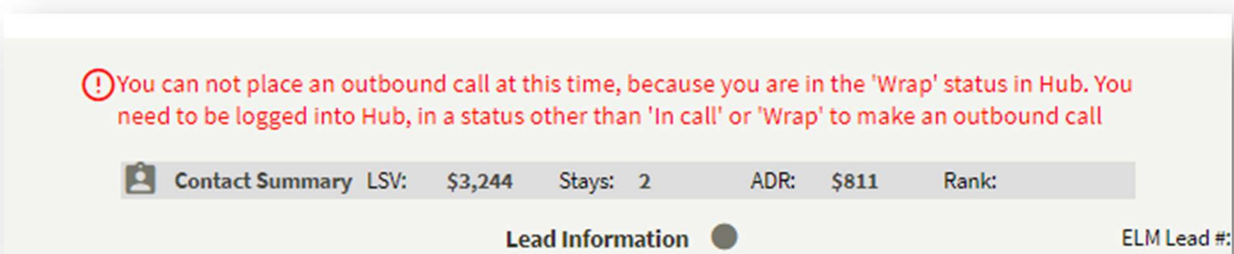
Phone Number Formatting

When dialing an outbound call in NAVIS, if the call button does not turn **blue**, your phone number is not in a valid format.

However, as you can see in the examples below, NAVIS accepts nearly all common phone number formats which makes copying and pasting phone numbers into NAVIS very easy:

Invalid Outbound Status

The only time you *cannot* place a call from a lead is if your current status is In Call or Wrap Up. If you attempt to dial out while in one of these statuses, you will see the following error message.



If you see the above error message:

- Complete your call / disposition
- Set your status to Project
- *Then* place your outbound call

Disposition Codes (Call Results)

Disposition - A label that describes the outcome of a phone call.

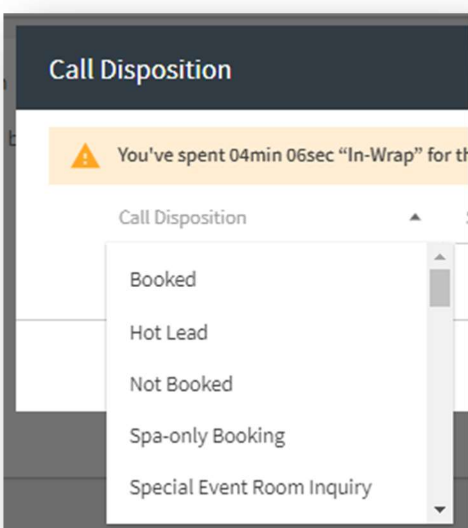
- It is important for all Reservations Agents to utilize the disposition codes accurately to help management gain a quick insight into the types of calls agents are experiencing.
- This information can be used to spot commonalities between calls that indicate a problem that needs solving. It can also help management discover opportunities for improvement.

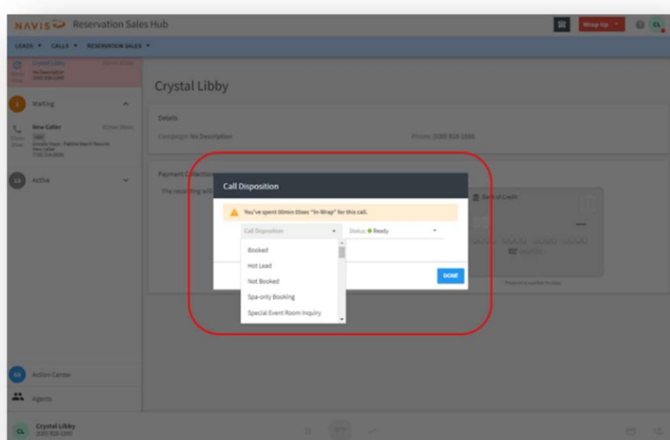
What is the difference between the Lead Status and the Call Disposition Code? After all, they are both codes to indicate what you have just done with a guest, right?

Lead Status	Disposition Code
This code indicates the current progress of a guest’s journey to booking. *Each lead can only have one Lead Status code.* *The lead status can change several times for one lead from “Follow Up” to “In Process” and eventually to “Booked.*	*It is common for guests to contact a Reservations Agent several times for the same lead. In those situations, there will be several call dispositions on one lead.* *The call dispositions reflect the history of each contact, therefore, once a call disposition is saved, it cannot be changed.*

How to Set A Disposition Code

At the end of each phone call, NAVIS will place you into a call status of **Wrap Up** and open a pop-up window prompting you to choose a **Call Disposition Code**. This must be completed before you can take another call.



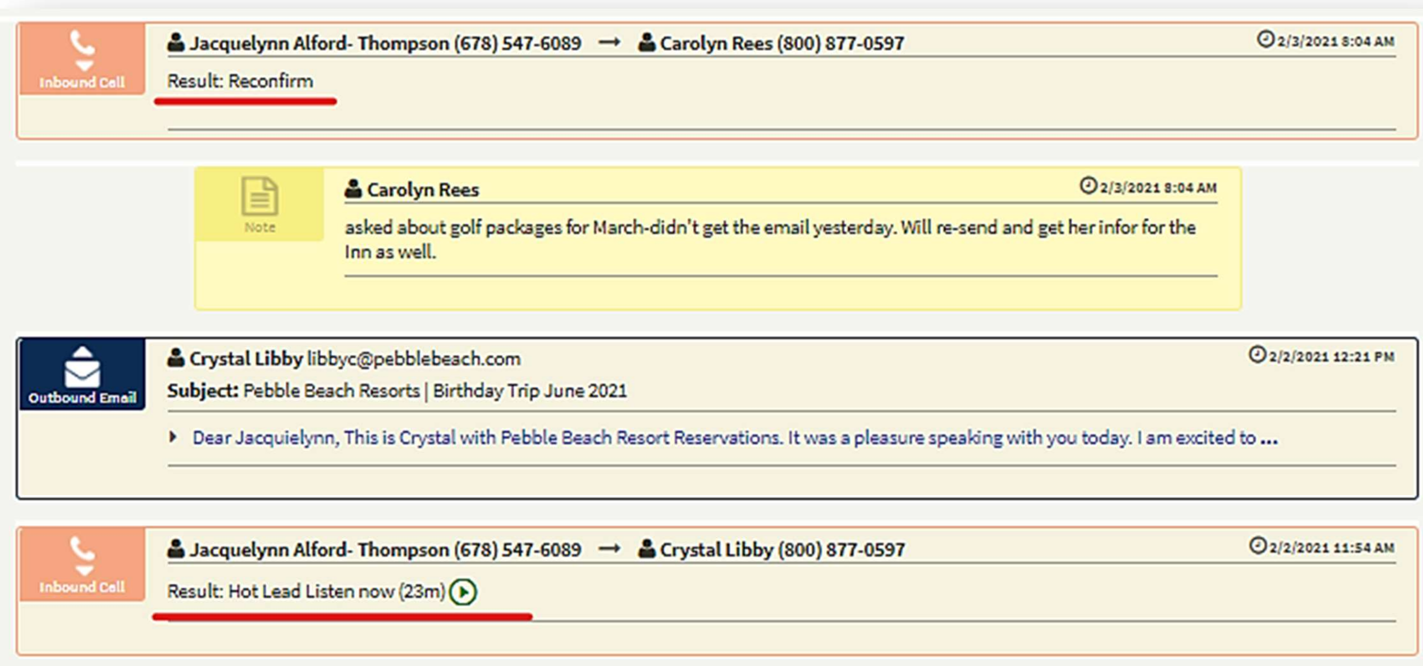


The Three Categories of Call Dispositions

You Created A Lead	A Lead Already Existed	No Lead Was Required
The caller booked The caller will potentially book and agreed to a follow up The caller asked about rooms but did not book and declined a follow up	The caller was booked by a previous agent The caller was previously discussing booking rooms with an agent.	The caller was not calling about rooms and did not book

Where to See A Call’s Disposition Code on a Lead

Since each lead will often have multiple calls involved, you will see the various Call Dispositions documented in the **Conversation History** section. Notes left by the agent who spoke with the guest will be documented here as well.



Dispositions – You Created A Lead

You Created A Lead
The caller booked
The caller will potentially book and agreed to a follow up
The caller asked about rooms but did not book and declined a follow up

Most Common Reservations Dispositions

Booked	Any new booking of rooms or day guest recreation.
Hot Lead	A guest who has expressed interest in booking rooms but cannot commit on the first call *and* has agreed to a follow up call or email.
Not Booked	A guest expressed interest in a room stay (not day Guest Recreation), but ultimately did not book and declined a follow up.

Seldom Used Reservations Dispositions

Special Event Inquiry	The guest is looking for rooms over a major PBC event, but rooms are sold out. This is a rare exception where the Lead Status will be "Not Booked," but the disposition code will not. *Qualifying Events are:* 1. AT&T Pro Am 2. Food & Wine Festival 3. Concours d'Elegance 4. First Tee Open 5. Pebble Beach Invitational 6. USGA Am 7. U.S. Open

Spa Agent Dispositions

Spa-Only Booking	Day guest booking spa services. This is a rare exception in which the Lead Status will be "Booked," but the disposition code will not.

Dispositions – A Lead Already Exists

A Lead Already Existed
The caller was booked by a previous agent
The caller was previously discussing booking rooms with an agent.

Most Common Reservations Dispositions

Agent Call Back	You have either "starred" or assigned a lead to another agent for follow-up as a directive for them to call this guest back.
CXL Reservation	You cancel a full Itinerary for a guest.
Change/Revise Existing Reservation	You have modified the bookings or information on an existing Itinerary or Guest Tile.
Outbound Call – Left Voicemail	You placed an outbound call to a guest, but they did not answer, so you left a voicemail.
Reconfirm	You have spoken to a guest about their booking but did not make any changes.

Seldom Used Reservations Dispositions

Internal: Guest Issue / PBC Employee Inquiry	A guest is transferred to a manager to settle a dispute. Or an employee from a different department has a general inquiry.

Spa Agent Dispositions

Checking on Waitlist	The guest is checking on an existing waitlist
Cost Breakdown / LOA / Collateral	The guest requests a cost breakdown for their stay or is inquiring about a Letter of Authorization

Dispositions – A Lead Is Not Required

Note:
Whenever a guest is inquiring about rooms, you should be saving a lead.
Even if the conversation also touches on the topics below, if rooms were discussed, you should be selecting your disposition code from the 'You Created A Lead" list.

No Lead Was Required
The caller was not calling about rooms and did not book

Most Common Reservations Dispositions

Day Guest Golf	Day guest golfer, who does not have intent to stay, that will call back to book according to the specified day guest golf guidelines.
Day Guest Recreation	Day guest, who does not have intent to stay, that may or may not call back to book spa or restaurant reservations
General Inquiry	General question from guest (ex. Hours of op, weather, dress code, etc.) This does not apply if rates or dates were discussed.
24 Hour PB Golf	A Day Guest Golfer called for a Pebble Beach Golf Links tee time, but did not book
90 Day SG Golf	A Day Guest Golfer called for a Spyglass Hill Golf Course tee time, but did not book
6 Month SB/DM Golf	A Day Guest Golfer called for a Links at Spanish Bay or Del Monte Golf Course tee time, but did not book
Transfer to Another Department	You transferred the guest to a more appropriate department.

Seldom Used Reservations Dispositions

Gift Card / Gift Certificate Purchase	Guest purchased or inquired about a Gift Card, was transferred to the Charity Certificate desk or inquired/purchased tickets to the NYE event.
Group Attendee Booking Recreation	Any group attendee who booked golf, dining, or spa services.
Group Reservation Inquiry	The guest is part of a large group booked by Group Sales but is only calling for information.
Misdialed / Disconnected	The caller disconnected, the call was dropped, or the caller dialed the wrong number.
VIP Reservation	Guest calling about their VIP booking, referred to original booking source or transferred to VIP Coordinator.

Spa Agent Dispositions

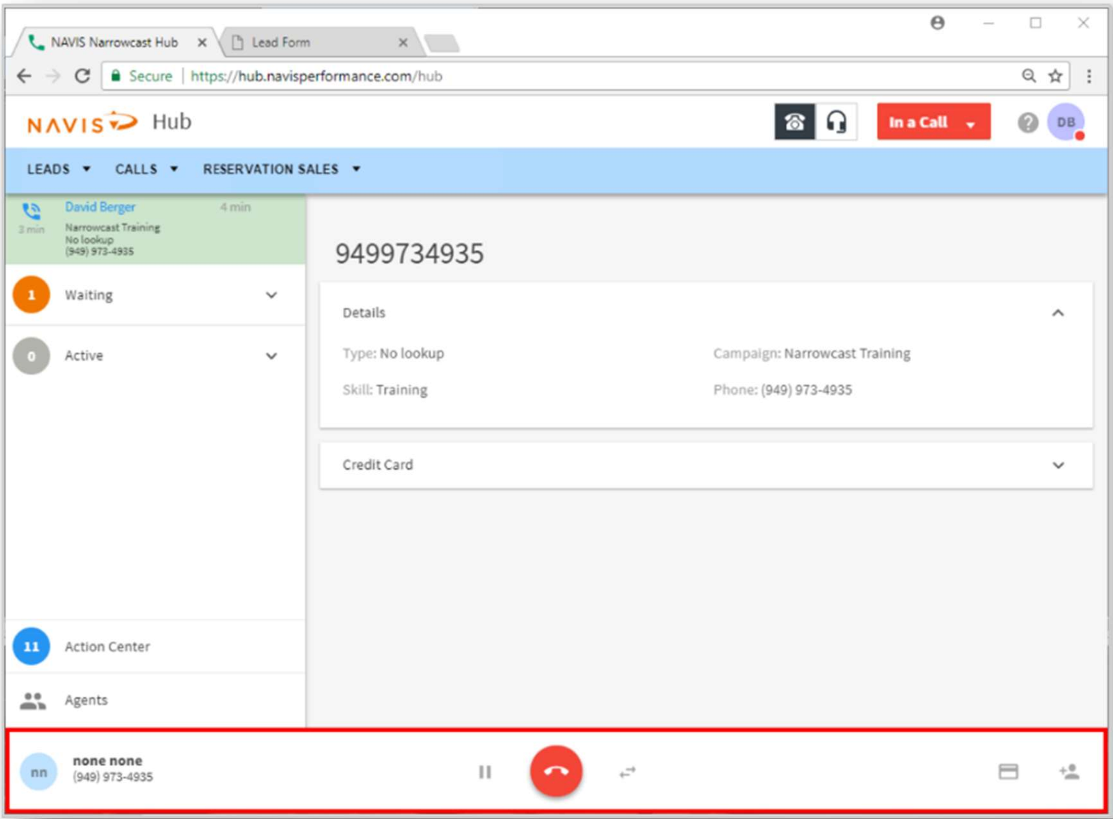
Spa Desk	Only Spa Employees – Guest is a member calling for information
Spa Provider	Only Spa Employees – Caller is a provider calling for information
Spa Transfer to Another Department	Only Spa Employees - The guest is transferred to a more appropriate department.
Spa Misdialed / Disconnected	Only Spa Employees - The caller disconnected, the call was dropped, or the caller dialed the wrong number.

Dining Agent Dispositions

Dining Desk	Only Dining Agents – Guest is calling for information
Dining Transfer to Another Department	Only Dining Agents - The guest is transferred to a more appropriate department.
Dining – Misdialed/ Disconnected	Only Dining Agents - The caller disconnected, the call was dropped, or the caller dialed the wrong number.

Call Control Bar

The **Call Control Bar**, located at the bottom of The Hub, is like the **Operator** of NAVIS.



From Call Control Bar, you can:

- Connect callers to specific Reservations Agents with whom the guest has a prior relationship.
- Place callers into specific call queues, aka "skills," if they are calling about an issue you are not trained to handle
- Pause call recordings when you need to collect sensitive information to protect the guest's data security
- "Pop" a new blank lead if the lead failed to open automatically
- Disconnect a current call

Hold for Agent

The "Hold" function of NAVIS is how we connect caller to a specific Reservations Agent.

This is different than connecting someone to an internal department, which is done by using the transfer function on your desk phone. Hold for Agent can only be used for Pebble Beach employees who are also logged into NAVIS.

Hold for Agent	**Transfer via Desk Phone**
Connect to a fellow agent who is logged into NAVIS.	*Connect to an Internal Pebble Beach Department that does not use NAVIS*
• A guest asks to speak with a specific Reservations Agent • A Vacation Planner guest calls to book a reservation that they have been discussing with another agent	1. A guest wants to make a same day Restaurant Reservation, so transfer them to the Host Stand 2. A guest wants to speak to the Pro Shop about an item in their shop.

Hold for Agent vs. Transfer to Agent

You will notice the NAVIS Control Bar gives us the option place a caller on hold for an agent AND the option to transfer to an agent.

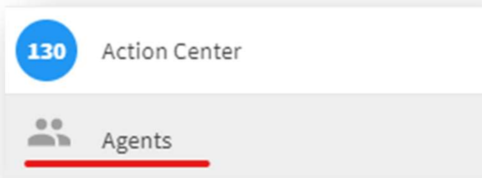
The reason we use "Hold for Agent" instead of "Transfer" is that the "Hold" option allows the agent to prepare the information they need to have up and quickly refresh their memory of the situation before accepting the call. We only use the Transfer button to transfer a caller into the back of the line of a call queue.

How to Place a Call on Hold for an Agent

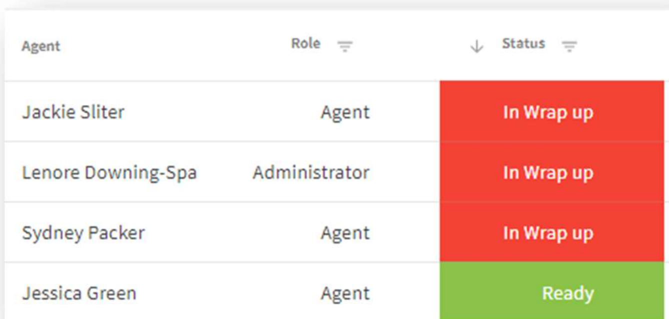
- You receive a call from a guest who asks to speak with a specific agent.

  "Certainly, Mr./Mrs./Ms. _____. Let me see if they are available to speak with you. May I place you on a brief hold while I look into that"

- Access the "Agents" screen of the Hub via the button in the bottom right corner



- Find the agent the caller wishes to speak with and check what status they are currently set to:



In order to put a caller on hold for an Agent….

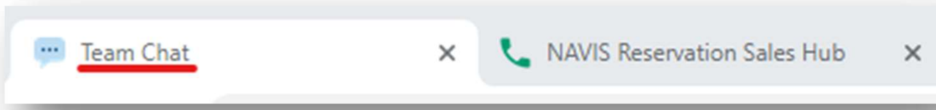
The Agent's Status must be:

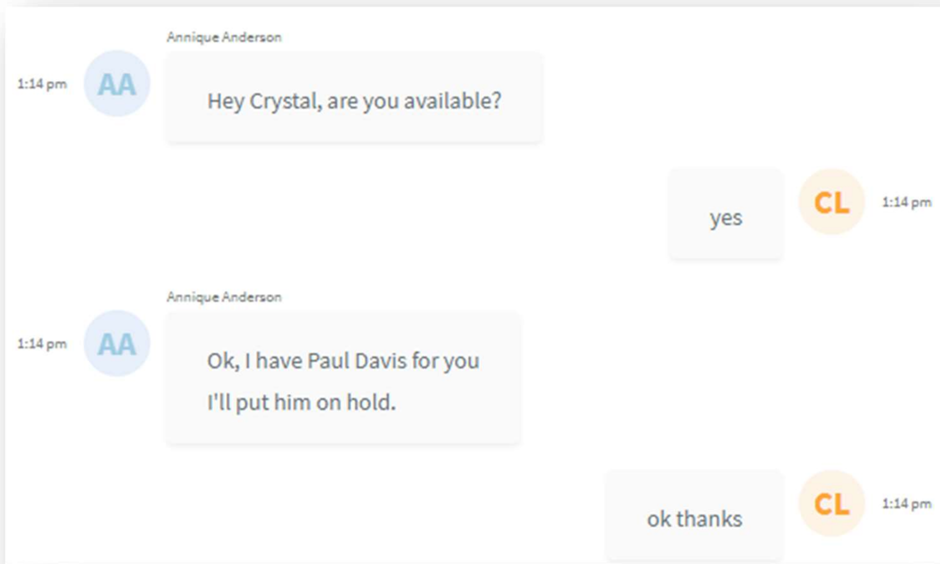
1. **Wrap Up**
2. **Ready**
3. **Any Orange Status**

The Status cannot be:

- **In Call**
- **On Break**
- **At Lunch**
- **Away**

- Open a NAVIS chat with the agent



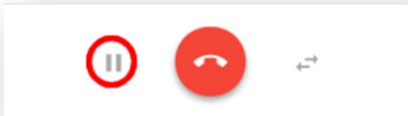


Note:
If you do not receive a reply from the agent within 15-30 seconds, pick up a new line on your desk phone and dial that agent’s direct extension.

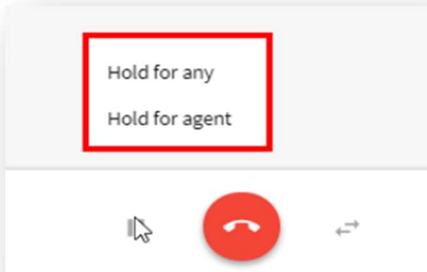
If they answer, ask if they can take the call, hang up with them, then proceed to the next step to place the caller on hold for that agent.

If they do not answer, go back to the caller and assist them best you can.

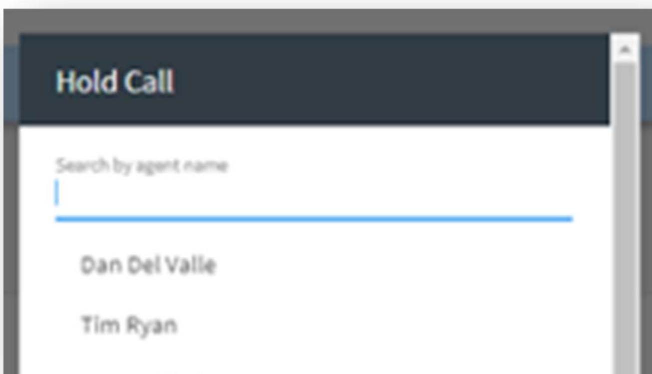
- Navigate to the center of the NAVIS Control Bar and click the pause symbol:

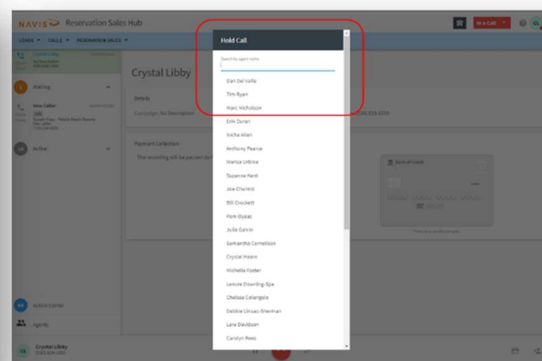


- Click "Hold for Agent:



- A search window will pop up with a list of all agents currently logged into NAVIS:





- Select the agent you wish to transfer to from this list.
- As soon as you click the agent's name, the call will be placed on hold for that agent and your status will be automatically changed to **Project**.
- There will be no option to select a Disposition as that will now be the task of the agent you connected the get to.

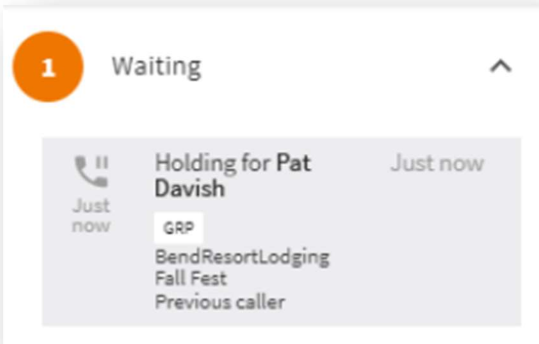
- Place yourself back in **Ready** status to continue on with your next call.

How to Receive a Caller Who Has Been Placed On Hold for You

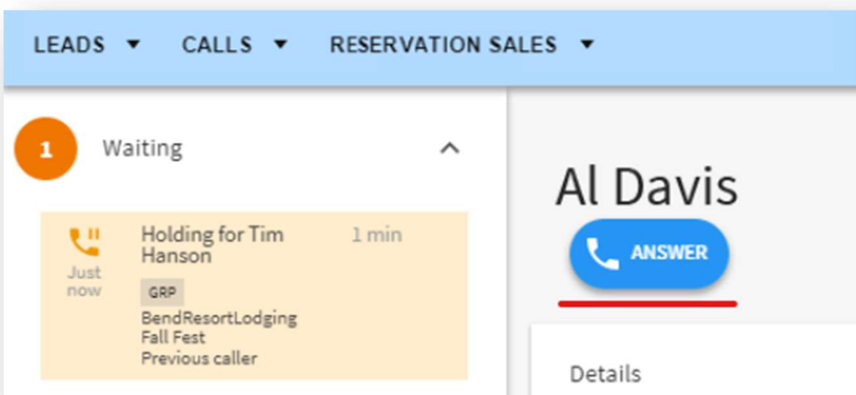
As the agent who is having a caller transferred to you, picking up that call is very simple.

1. Upon agreeing to accept the call, immediately change your own status to **Project** to avoid a new call from coming through to you.

2. As soon as the first agent places the call on hold for you, you will see that caller's information at the top of the "Waiting" list in the NAVIS Hub with the message "**Holding for [your name]"**

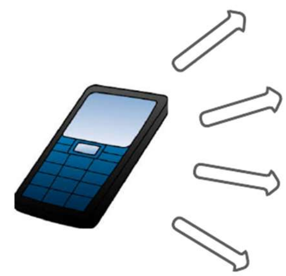


3. Click on that call. The information box will turn light orange and an "ANSWER" button will appear:



4. Upon clicking the answer button, the lead for that guest will auto-pop and your desk phone will ring, and you can proceed with the call as normal.

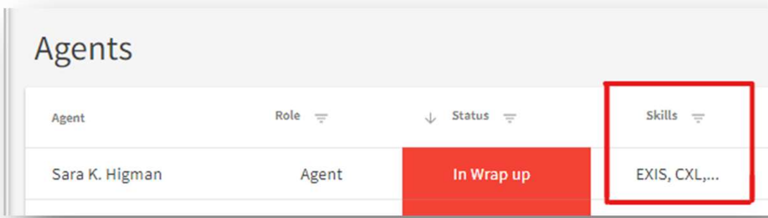
Transfer to Skill



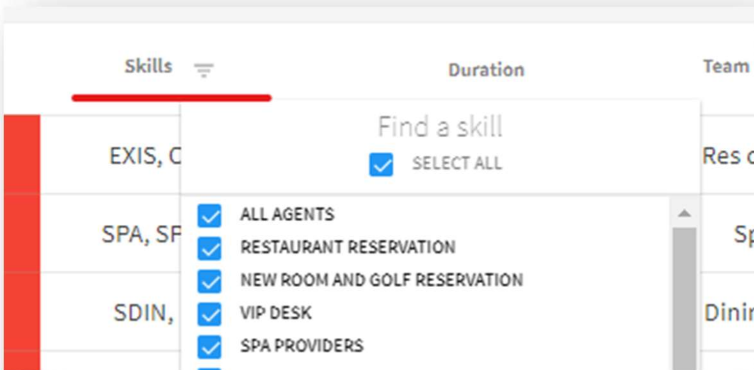
All Reservations Center phone calls are routed into queues called **Skills**. These Skill queues connect the guest with specific agents who are trained to handle the type of issues the guest is calling to address.

Call routing is based on:

- The phone number the guest called
- The prompts the caller selected in the phone tree
- The department the guest is being transferred from



In the **Agents** screen of The Hub, you can see which skills every agent is assigned to take.



By clicking the header of the **Skills** column, you can see a list of all possible Skills programmed into NAVIS.

As a Reservations Agent, if you receive a call from a guest who needs help with a "Skill" to which you are not trained to handle, you **Transfer the caller into the appropriate Skill** using the Call Control Bar.

By transferring a guest into a specific skill queue, their call will be answered by the first available agent who is trained to answer that skill.

Common "Transfer to Skill" Situations

1. You are a new agent who is only trained to answer Day Guest Golf and Dining, but a caller begins asking about rooms.
   You will need to transfer that caller into the "New Room and Golf Reservation" skill.

- You are a Reservations Agent who has set up a guest's room and golf, but now they want to add Spa reservations.
  You will need to transfer that caller into the "Spa Members" skill to reach a Spa Agent.

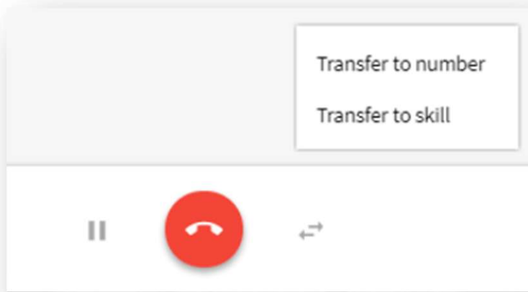
How to Transfer to A Skill

Note:
The "Transfer" feature of NAVIS should only be used to place callers into specific skill queues.

It should not be used to transfer callers to a specific agent.

If a caller wants to speak with one specific Reservations Agent, please see the "Hold for Agent" section of this manual for instructions.

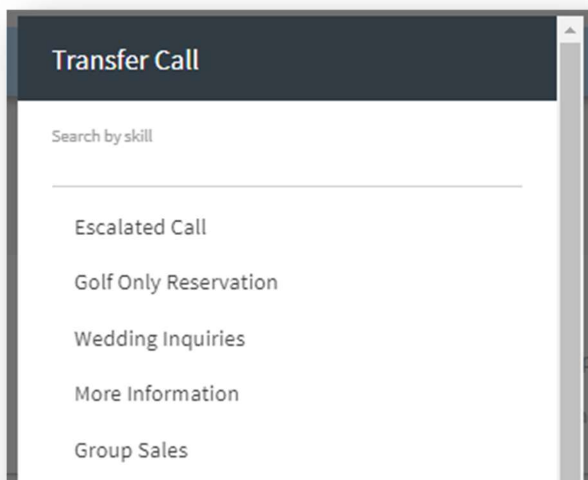
1. Access the Call Control Bar at the bottom of The Hub and click the button with two arrows.
2. Click "Transfer to Skill"



3. A search bar will appear with a list of all available skills within NAVIS. Select the most appropriate option for your caller.

As soon as you select the skill, your status will be automatically changed to **Project**.

There will be no option to select a Disposition as that will now be the task of the agent you connected the get to.



4. Place yourself back in **Ready** status to continue on with your next call.

Collect Payment

As a Reservations Agent, you will frequently need to collect credit card information from callers.

All guest credit card information is ultimately stored within Springer Miller (SMS) for each guest since that program is where we process all guest bookings.

However, we still utilize the NAVIS **Payment** feature for two reasons:

- By typing credit card information into NAVIS, we can see instantaneously if a credit card number, expiration date, and security code are valid. This helps us to catch possible mistakes very quickly without needing the ask the caller to repeat their card information.

- NAVIS records all calls inbound and outbound, but, in the interest of data security, we do not want to have guest credit card information saved on these recordings. By clicking into the "Payment" feature of NAVIS, the recording is temporarily paused.

Data Security

The Pebble Beach Company is a PCI Compliant organization. PCI stands for **Payment Card Industry**. This is a data security standard that dates back to 1999 to prevent credit card fraud and identity theft.

In conjunction with PCI data, it is the responsibility of Pebble Beach Company and every Pebble Beach Reservations Agent to protect the **Personally Identifiable Information** (PII) of each one of our guests.

PCI Data	PII Data
First and Last Name	First and Last Name
Credit Card Number	Phone Number
Credit Card Expiration Date	Address
Credit Card Security Code	Email Address

Pebble Beach Rules to Maintain PCI Compliance:

- Do not write down any PII information anywhere other than NAVIS or SMS
- Do not record any PII or PCI data into any electronic note-taking media, such as Word or Sticky Notes
- If you suspect a PCI Breach, contact your supervisor who can contact support@naviscrm.com
- Inform every guest that you will be pausing the recording to protect their PCI:

"For security purposes, Mr./Mrs.______,
I am going to pause the recording before
I collect your credit card information."

How to Collect Payment During A Call

When you are speaking with a guest, the primary screen you will be looking at will be the Lead Form.

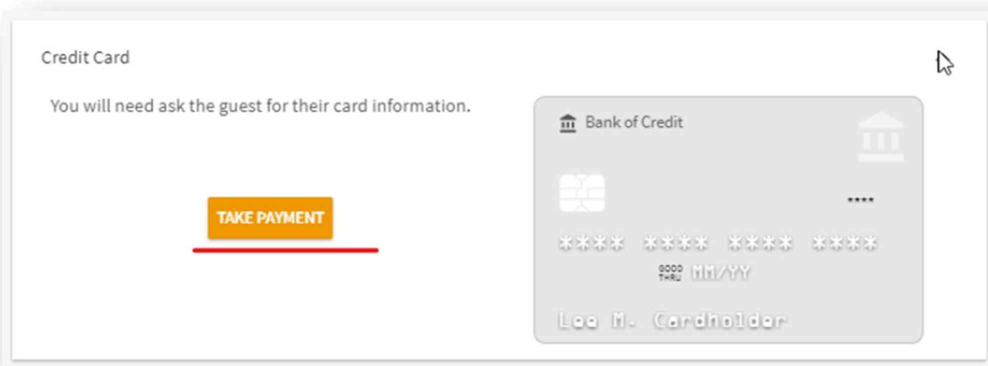
When it comes time to collect payment for a booking, click from the Lead Form back to The Hub of NAVIS to pause the recording:

Pause the Recording

Once you are in The Hub, there are two buttons you can click to pause the call recording:

- On the NAVIS Hub, in the Call Control Bar, you will see a credit card icon in the bottom right corner:

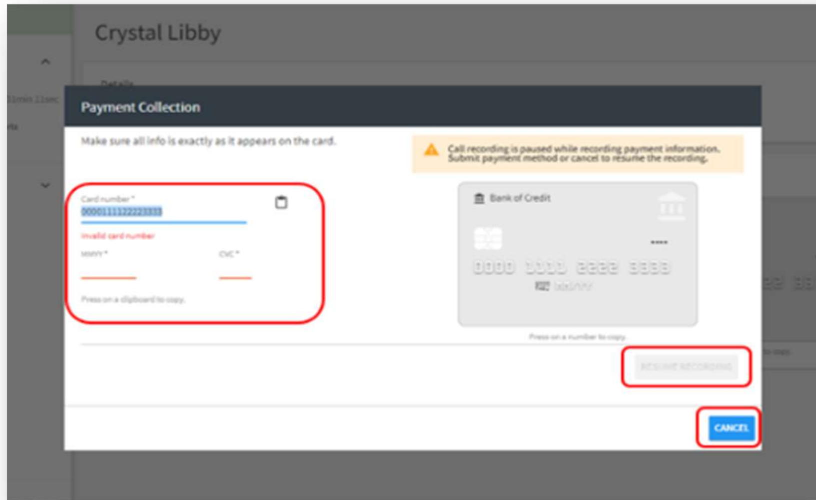
- In the middle of the screen, you will see a section with a grayed-out credit card next to an orange "**Take Payment**" button.



A new **Payment** window will open in The Hub.

Here, you will see spaces to type in your guest's credit card number, expiration date, and security code.

The call recording will be paused for the entirety of time this window is open.



Provide the Disclaimer

Before you click into the Payment window, it is crucial that you inform the caller that the recording will be paused for security purposes. Stating this outright to the guest is a required piece of PCI compliance.

"I am going to place our call recording on pause to protect your credit card information."

Verify the Card

When you collect a guest's credit card information, it must ultimately be entered into your guest's Guest Tile in SMS using your credit card reader. However, you can use this pop-up window in NAVIS to verify the validity of the credit card before saving it to the guest tile.

When you first open this **Payment** window, the credit card image to the right of the information fields will appear as grayed out.

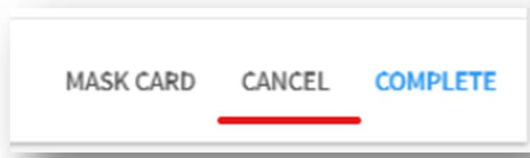
If you type the guest's credit card number, security code, and expiration date into the information fields – *if the card is valid* – the credit card image will change to reflect the numbers you typed, and will also show the logo of the credit card company to which that card belongs, i.e. Visa, Discover, American Express.

Un-Pause the Recording

While it is very important to pause the recording of your call for sensitive information, it is also crucial that you remember to un-pause the recording so the closing of your call can be captured for our records.

Once you have entered the guest's credit card information in SMS, you must hit the **CANCEL** button in the NAVIS Payment window. This will resume the recording of your call.

If you have entered the guest's credit card info into NAVIS to verify the card, it is important that you do not hit "Complete" when you are done entering the card into SMS.



Hitting Complete will save the guest's credit card to NAVIS, but we do not want this information saved here. We only store credit card information in SMS.

Dining Payment Exception

The primary aspect of the Payment feature for Reservations Agents is the ability to pause the recording in the middle of a call.

In the event that a Reservations Agent forgets to pause the recording, NAVIS has created a fail-safe to make sure that the guest's PCI data is not compromised.

> **NAVIS Data Privacy Fail-Safe:**
>
> If a Reservations Agent saves a call with a disposition of "Booked" but the recording of that call does *not* have a pause, NAVIS will automatically delete the entire recording of that call.

This automatic recording deletion is a terrific feature to ensure the protection of personal data, *however,* there is one type of call that we, as Reservations Agents, mark "Booked" without needing to collect the credit card**:** **Dining Bookings**.

There is technically no need to pause the recording at any point during a restaurant reservation call because that guest's credit card information will not be said out loud during the call but NAVIS does not know this.

Since we do not want all of the Dining Booking call recordings deleted, when you take a call exclusively for a restaurant reservation, you must click in and out of the Payment feature of NAVIS while the caller is on the line in order to create that pause in the recording, even if the pause is only one second long.

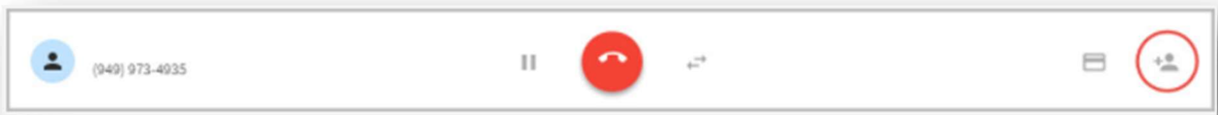
Pop A New Lead

There are two ways to force a lead to "Pop" in NAVIS in the event that:

- A lead fails to auto-pop
- You accidentally close the lead
- You close it on purpose because you didn't think the call would turn into one that requires a

Force-pop from the Call Control Bar

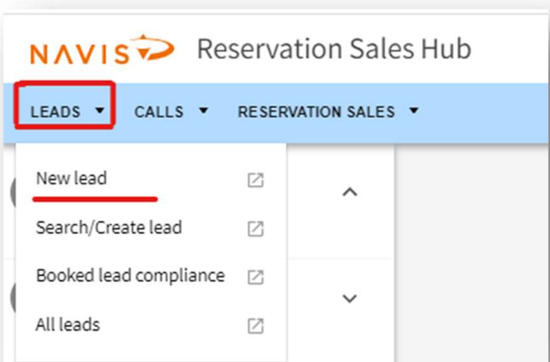
If you are on a call currently, you can force the lead to auto-pop via the Call Control Bar located at the bottom of The Hub. The icon to create a lead is circled in red below. The new lead will auto-populate any information available based on the phone number of your current caller.



Popping the lead from the Call Bar will pull information about the caller you are currently speaking with their contact information and the campaign they are calling on.

Create A Blank Lead from The Hub

If you are not currently on a call, but need to create a lead, click the "Lead" button on the toolbar located in the top left corner of The Hub

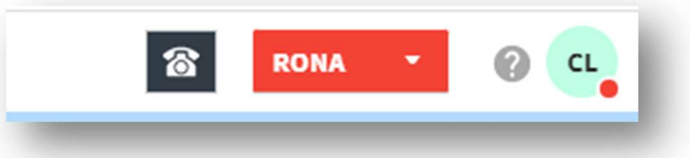


Because this method will create a blank lead with no guest information, the Call Control Bar is the preferred method to create a lead when you are on a call.

RONA

Redirect on No Answer

RONA is a status that NAVIS will put an agent into when something has gone wrong.



The most common causes for a RONA *status are:*

1. The Reservations Agent did not pick up the phone within the first three rings
2. A phone call has failed to dispatch to the agent's desk phone

If you are put into RONA by NAVIS and cannot change your status back to Ready or Project, this usually an indication of a program outage that is likely affecting multiple agents.
Report the issue to a supervisor.

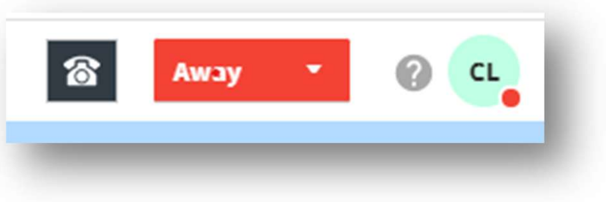
Three Rings

If you do not answer an incoming NAVIS call within three rings, the call we be sent back into the queue and your status will be automatically changed to "RONA."

Do not let this happen.

By letting the call come through without answering, you have put that guest back in line and inconvenienced them by increasing their hold time.

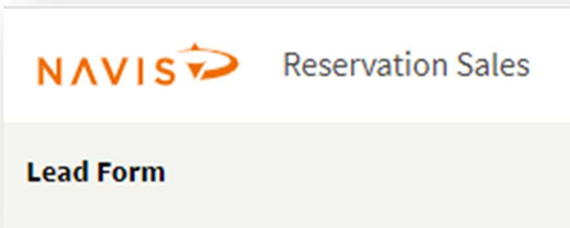
You should never put yourself in Ready if you are not prepared to take a call. If you need a break between calls to gather yourself, change your status to "Away" via the Disposition box of your last call.

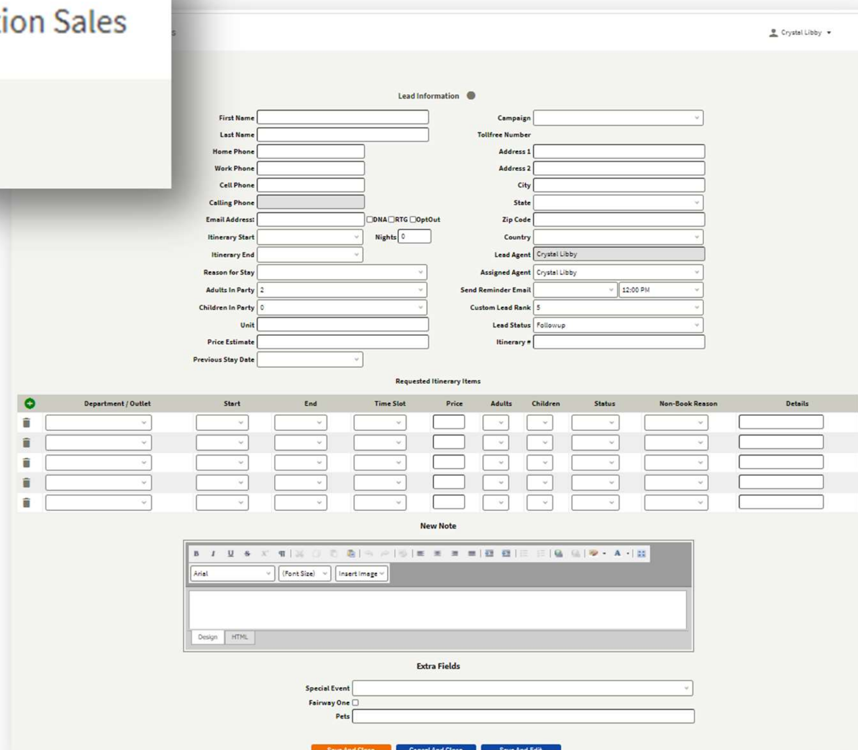


Leads

In Sales, a "Lead" is a prospective customer. It is someone who has expressed interest in a product, service, or experience, but has not yet finalized a deal.

In NAVIS, a "Lead" is a page where we as Reservations Sales Agents can document a plethora of information about callers, beginning from their first initial contact with us, throughout the booking process, all the way until their visit is complete.





Lead Management

Is the methodology for acquiring and tracking prospective customers, following up with them at appropriate times, and utilizing sales acumen to close sales in a way that maximizes profit.

It is important for **Pebble Beach Reservations Agents** to accurately fill out lead forms to provide clean data to the **Revenue Management** and **Marketing Team** so they can utilize that data to create targeted marketing plans and adjust pricing, policies, and practices to maximize bookings.

Fortunately, NAVIS does much of the Lead Management for us.

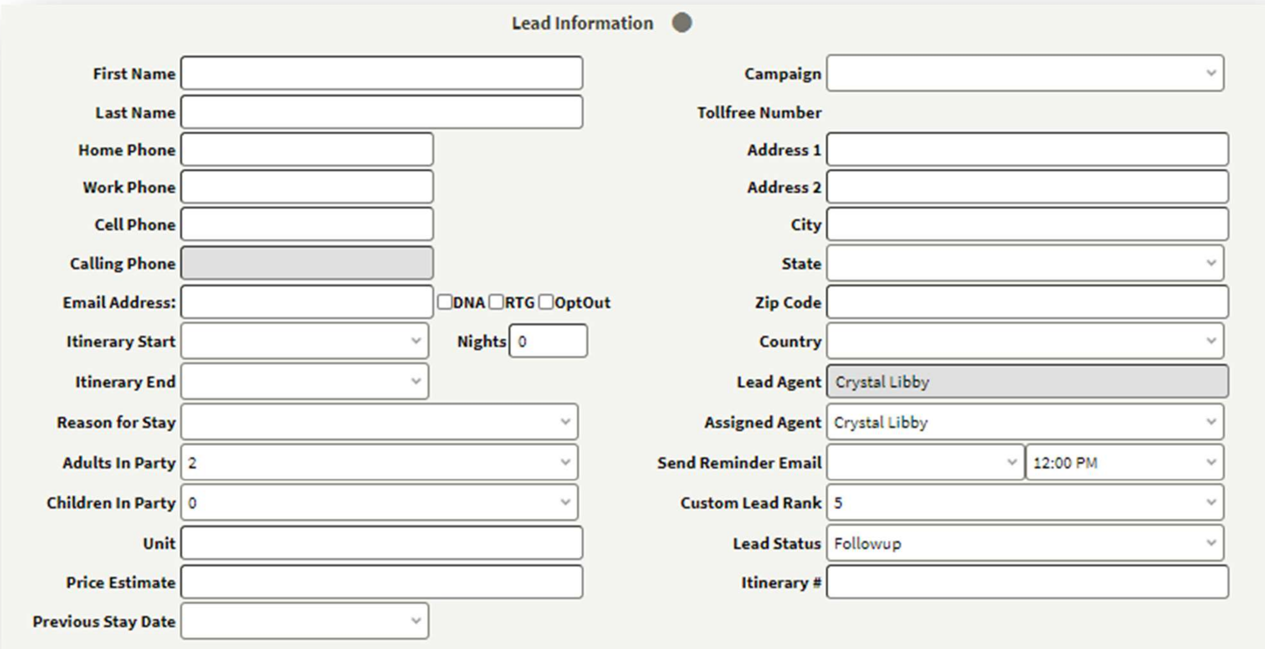
By utilizing the Leads of NAVIS, we can:

- Record vital guest contact information
- Document interactions with guests throughout the booking process
- Set email reminders at specific days and times when we want to follow up with guests
- See when guests have previously called and with whom they have spoken
- Send and receive emails directly through NAVIS that all Reservations Agents can see
- Record our sales metrics to understand how our bookings stand both as a team and individually

Elements of a Lead

Data

The Data section of the lead will always be the first area you will look when a call comes through. When you receive an inbound call, it is common that the lead that opens will have several data fields already pre-populated.



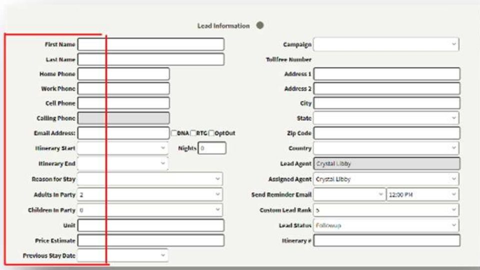
Information about a guest is accessible to NAVIS through:

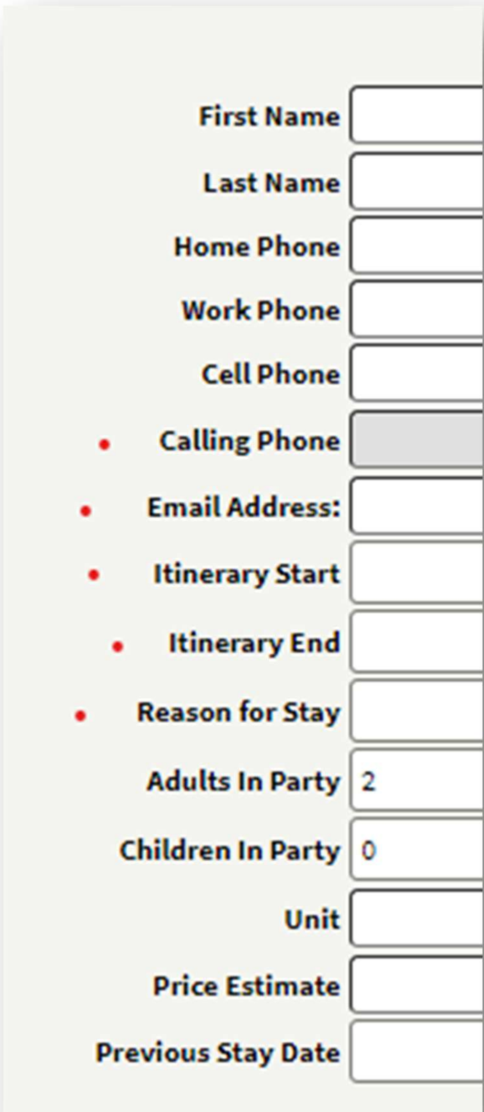
- An existing SMS Guest Tile based on the caller's phone number
- An existing SMS Reservation based on the Itinerary number in the Itinerary field
- The National Registry based on the caller's phone number

It is still best practice to **verify** all information about a guest – including their name – just in case the data that NAVIS has pulled from the sources above is incorrect.

When verifying information, it is important that you always ask the guest to provide their own personal details as opposed to reading out what you see on the lead and asking if it is accurate. We should never offer up personal information of a guest.

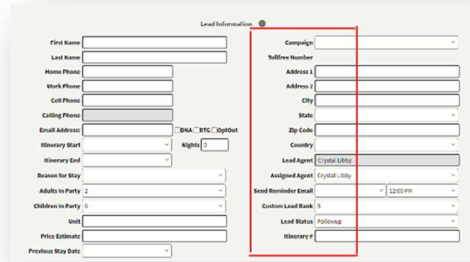
Key Data Fields

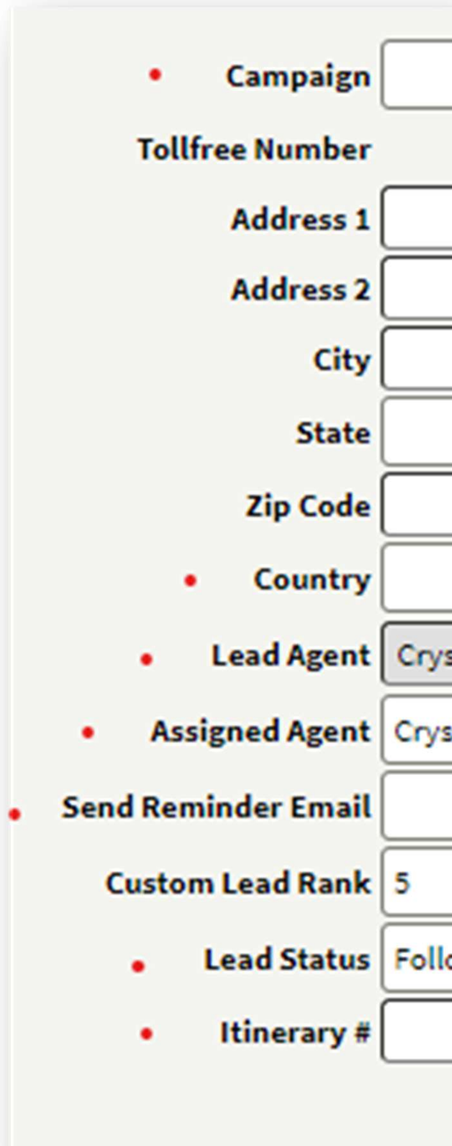




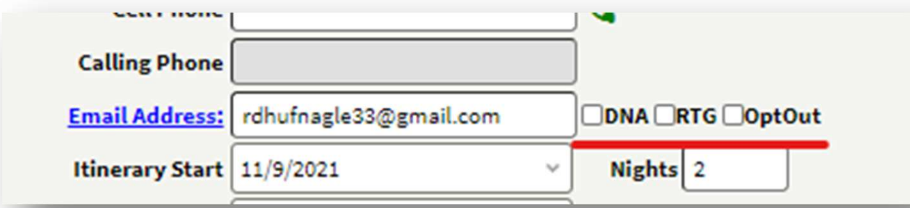
Calling Phone:	This field is always pre-populated by NAVIS for inbound calls. If a guest is calling for a second time, NAVIS automatically pull up their existing lead for the answering agent based on the Calling Phone number. If a guest has booked with us using their cell phone, but later calls us back from their office phone number, NAVIS will not auto-pop their Booked Lead. We must instead use the search tool to find the correct lead.
Email Address:	There are 3 checkboxes to the right of the email field. These will be addressed in the following pages. *This is a required field to save a lead.*
Itinerary Start and End Date	A shortcut for setting a date range is to enter the start date, put the number of nights they want to visit in the "Nights" field, then hit tab. This will auto-populate the end date. This is a required field to save a lead.
Reason for Stay	Your most common selections from this dropdown list will be: • Buddy Trip • Family Trip • Bucket List Trip • Birthday • Honeymoon/Anniversary • Day Guest *This field is not required to save a lead, but if not filled out, your lead will be out of compliance.*

Campaign	This field is always pre-populated by NAVIS for inbound calls.
Country	*This is a required field to save a lead*
Lead Agent	This field will auto-populate to the name of the agent who is currently working on the lead.
Assigned Agent	This field should be set to the agent who has "ownership" over the lead. This will be the guest's primary contact and the agent who will be credited with the booking.
Send Reminder Email	NAVIS will send you a reminder email to your Outlook inbox at the date and time you enter in this field. This field is most commonly used with "In-Process" leads for which a follow-up call or email is required.
Lead Status	This field is automatically set to "Follow up" on new leads. Proper use of the Lead Status field will be addressed in the following pages.
Itinerary Number	When this field is filled out, NAVIS will interface with SMS based on the Itinerary number to autofill several fields of the lead based on the SMS Guest Tile and Reservation Tiles. *If you set the lead status as "Booked," the Itinerary field becomes a required field to save the lead.*





Email Address / DNA / RTG



DNA – "Did not ask" You are required to ask for a guest's email address for every booking that requires a lead. If you forget to ask, you need to check this box. Checking this box will put you out of compliance.

RTG – "Refused to Give" Check this box when you ask for the email address, but the guest does not want to provide it. You will not be out of compliance since you did your job by asking for the address.

Opt Out – When collecting an email address, you are required to ask if we can put them on our email list to receive future Pebble Beach offers. If they say no, check this box.

Checking DNA with a Booked Lead:

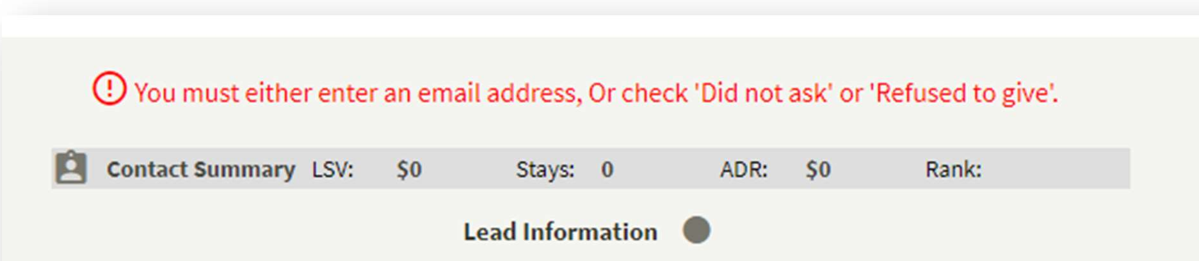
In NAVIS, if you hover over any field, you will see a small box appear with a short description of what that field means. The box you will see when you hover your mouse over "DNA" says:

> *Agent did not ask guest for email address*
> *Also use to retrieve email address from your reservation data*

The second line in this description is referring to checking this box when you have a **Booked Lead**. The DNA box, along with the Itinerary number box, trigger NAVIS to sync with SMS data. Therefore, if you book a lead with a guest, enter the Itinerary number, and check the DNA box, NAVIS will pull the email address from SMS and fill the box in for you along with several other fields of your NAVIS Lead.

Email Address Error Message:

If you attempt to save a lead for a guest who did not book with you, did not provide you with an email address, AND you did not check RTG or DNA, you will receive this error message upon attempting to save your lead:



Campaigns

A **Campaign** is a planned process to promote a product, service, or resource. One method of determining the effectiveness of a Pebble Beach marketing campaign is to track how many guests are calling in because of that particular advertisement.

NAVIS can determine which campaign a guest is calling about based on the phone number that they dial to reach the Reservation Center.

When our **Marketing** department creates a promotion or offer, they use NAVIS to generate a unique toll-free phone number for guests to call. That phone number is exclusively advertised in conjunction with that specific promotion, so when a guest calls that number, we know exactly what advertisement they saw before reaching out to us.

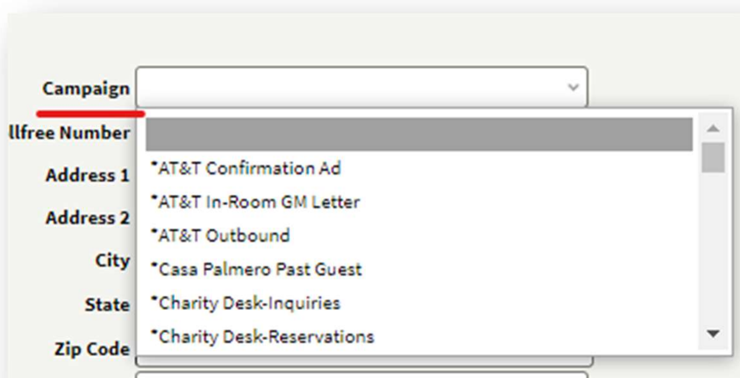
For example:

As soon as this call comes through NAVIS, we can see that this guest has called the toll-free phone number associated with our SCGA Stay & Play Package advertisement.

It is only when you create a new lead while off the phone that you will need to enter the campaign field in NAVIS yourself. In this case, most often you will select "www.pebblebeach.com Default."

The most common campaigns you will see are:

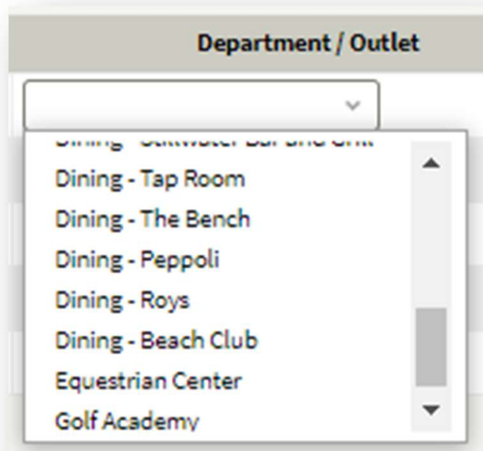
1. www.pebblebeach.com
2. Vacation Planner Inquiry
3. Stay & Play Package E-blasts
4. Past Guests E-blast
5. Dukes/NCGA Offers

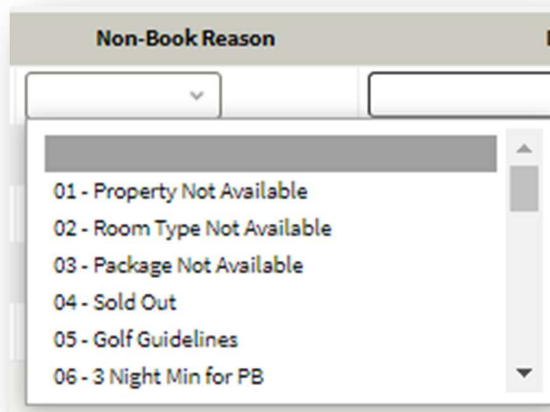


Requested Itinerary Items

The "Requested Itinerary Items" area of a lead is intended to document the potential bookings you discussed with a guest during any calls you mark with a Follow-Up, In-Process, or Non-Booked status.

Department/Outlet	This is where you select which service in which your guest is interested:
Start/End	The guest's desired start and end dates for this item/service
Time Slot	The time they wish to book (if applicable)
Price	The appropriate rate for that item/service
Adults/Children	The number of adults and children who will be present
Status	The only two options are "Follow Up" or "Not Booked"
Non-Book Reason	The reason they did not book this item/service during your call:

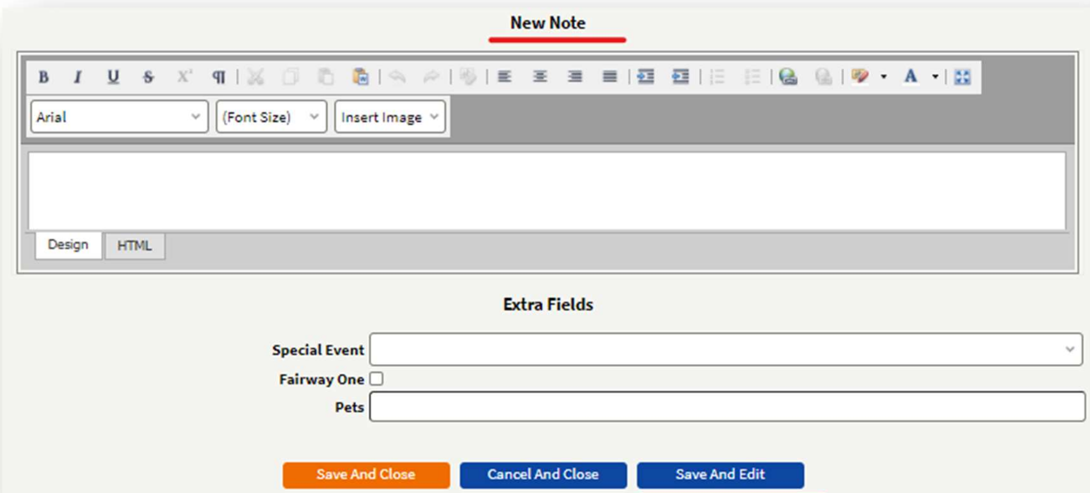


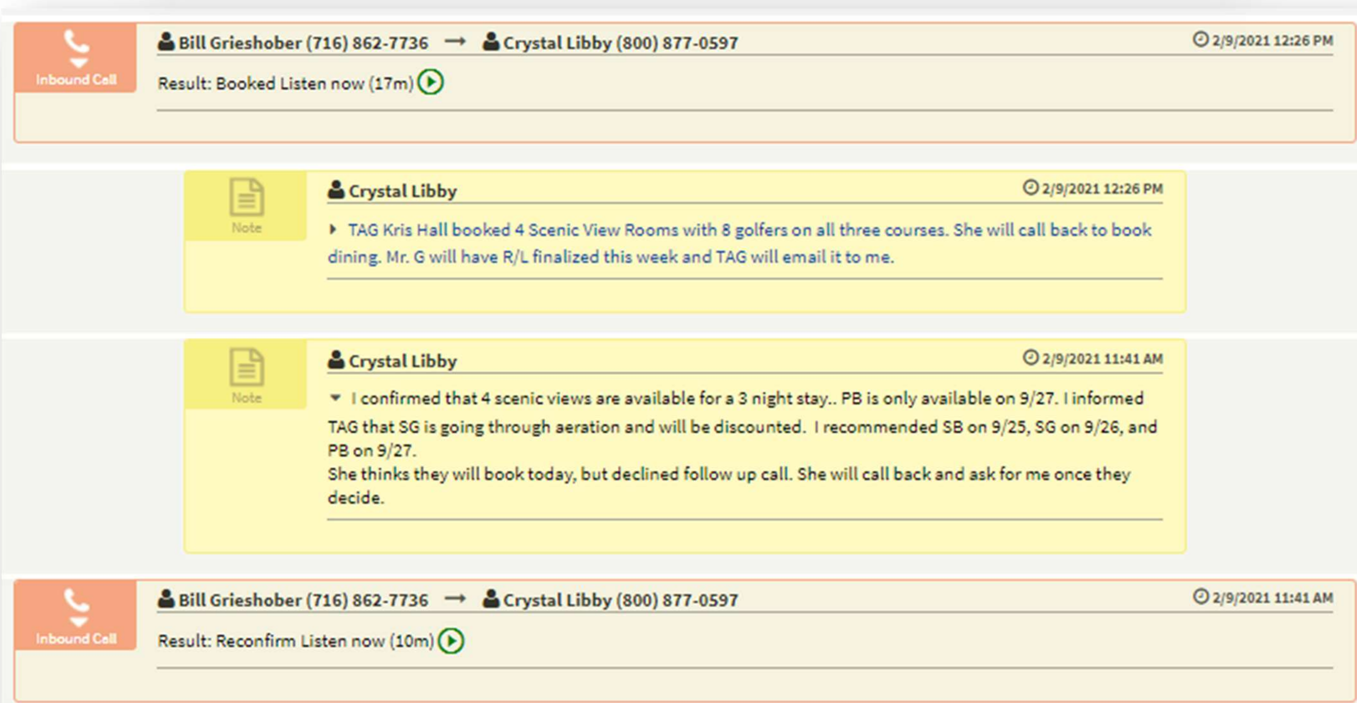


Notes

One of the most important tasks of a Reservations Agent is to take notes on all interactions with guests.

- This is a terrific way to become an active listener since notetaking helps you focus on the conversation and ensure you are not missing any vital information
- This is a fail-safe should a discrepancy develop between what the guest claims was discussed during the conversation vs. what you told them.
- This helps us deliver superior customer service because the next agent who speaks with this guest quickly get up to speed with their situation without making the guest repeat themselves.





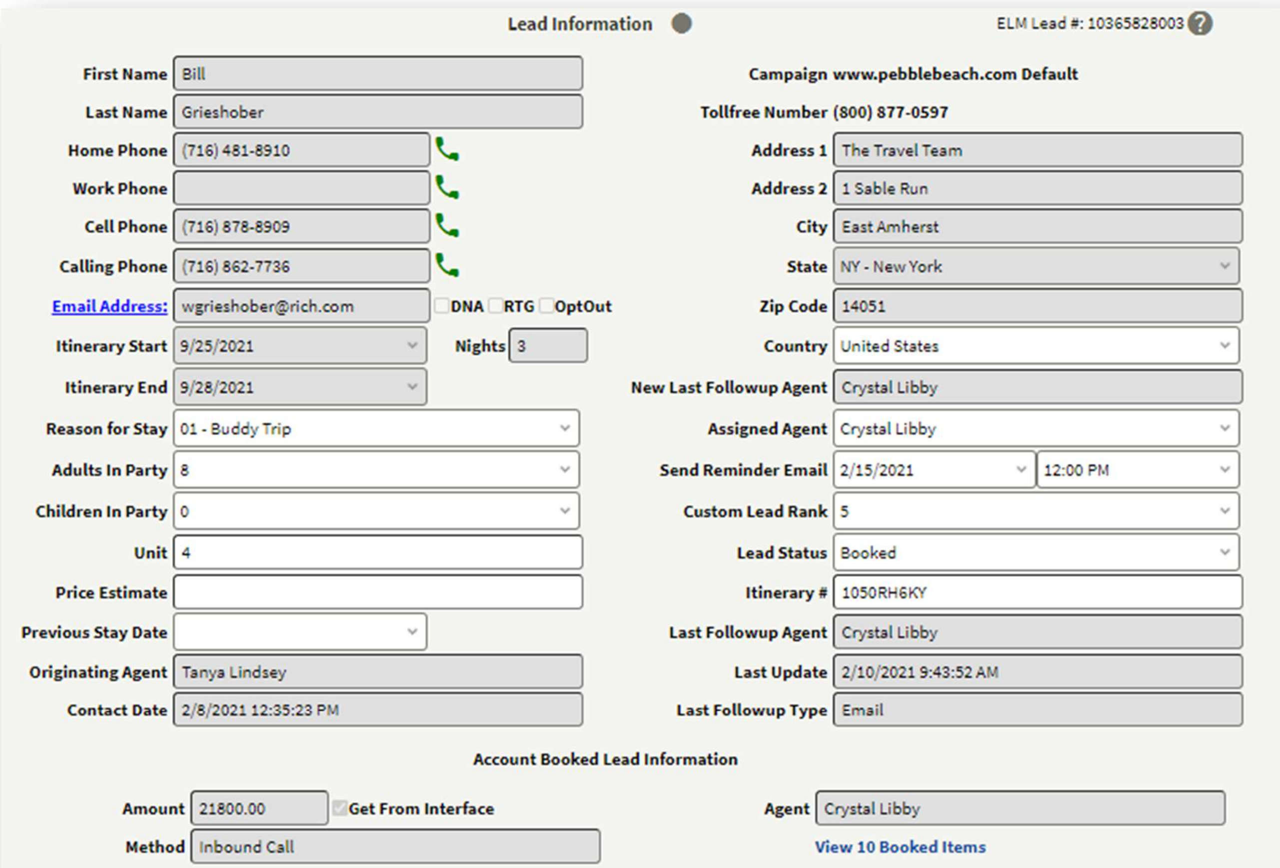
SMS Interface

Data Interface

Important Note: The SMS / NAVIS interface only moves one way: from SMS to NAVIS. Therefore, changes made within the Lead Form will not affect the SMS Booking.

When a Booked Lead is saved with the Itinerary number, the box of each field that has been pulled to NAVIS from SMS will be gray instead of white.

Please view the image below to see how many fields are connected to SMS through this interface.



Lead Information
ELM Lead #: 10365828003

First Name	Bill	Campaign	www.pebblebeach.com Default
Last Name	Grieshober	Tollfree Number	(800) 877-0597
Home Phone	(716) 481-8910	Address 1	The Travel Team
Work Phone		Address 2	1 Sable Run
Cell Phone	(716) 878-8909	City	East Amherst
Calling Phone	(716) 862-7736	State	NY - New York
Email Address:	wgrieshober@rich.com DNA RTG OptOut	Zip Code	14051
Itinerary Start	9/25/2021 Nights 3	Country	United States
Itinerary End	9/28/2021	New Last Followup Agent	Crystal Libby
Reason for Stay	01 - Buddy Trip	Assigned Agent	Crystal Libby
Adults In Party	8	Send Reminder Email	2/15/2021 12:00 PM
Children In Party	0	Custom Lead Rank	5
Unit	4	Lead Status	Booked
Price Estimate		Itinerary #	1050RH6KY
Previous Stay Date		Last Followup Agent	Crystal Libby
Originating Agent	Tanya Lindsey	Last Update	2/10/2021 9:43:52 AM
Contact Date	2/8/2021 12:35:23 PM	Last Followup Type	Email

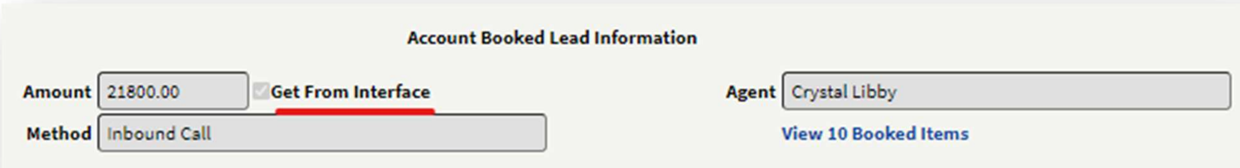
Account Booked Lead Information

Amount	21800.00 Get From Interface	Agent	Crystal Libby
Method	Inbound Call		View 10 Booked Items

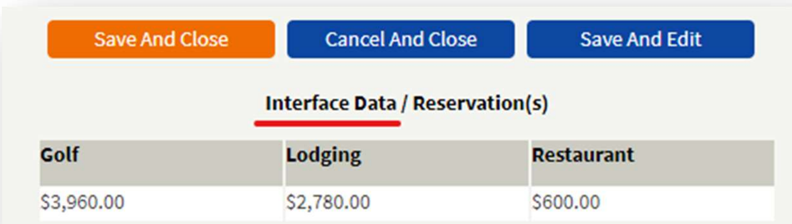
Revenue Interface

One of the primary purposes of the NAVIS interface with NAVIS is to track the revenue of each booking. There are several sections of a booked lead where you can see the revenue for the booking.

In this area, located just below the data section of the lead, you can also see the name of the agent who is receiving credit for this booking's revenue:

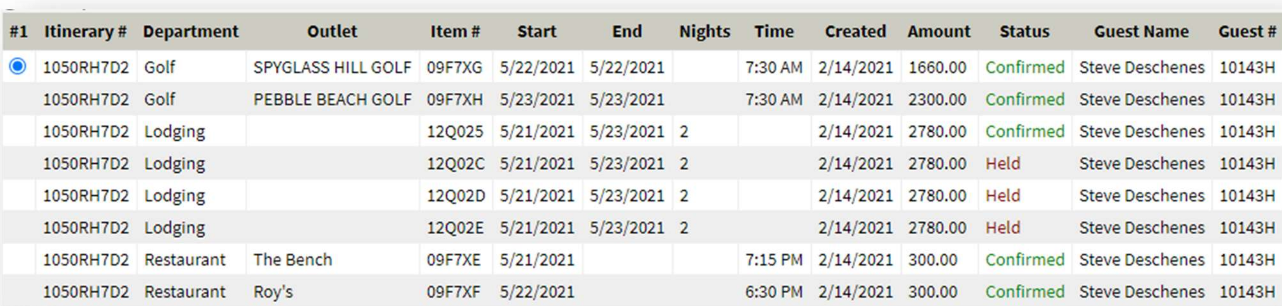


This area, located below the New Note box, will break down the revenue by type of booking:



Golf	Lodging	Restaurant
$3,960.00	$2,780.00	$600.00

Just below the above section, the booking is broken down even further, showing you every item that is booked on the SMS Itinerary for this guest:



#1	Itinerary #	Department	Outlet	Item #	Start	End	Nights	Time	Created	Amount	Status	Guest Name	Guest #
	1050RH7D2	Golf	SPYGLASS HILL GOLF	09F7XG	5/22/2021	5/22/2021		7:30 AM	2/14/2021	1660.00	Confirmed	Steve Deschenes	10143H
	1050RH7D2	Golf	PEBBLE BEACH GOLF	09F7XH	5/23/2021	5/23/2021		7:30 AM	2/14/2021	2300.00	Confirmed	Steve Deschenes	10143H
	1050RH7D2	Lodging		12Q025	5/21/2021	5/23/2021	2		2/14/2021	2780.00	Confirmed	Steve Deschenes	10143H
	1050RH7D2	Lodging		12Q02C	5/21/2021	5/23/2021	2		2/14/2021	2780.00	Held	Steve Deschenes	10143H
	1050RH7D2	Lodging		12Q02D	5/21/2021	5/23/2021	2		2/14/2021	2780.00	Held	Steve Deschenes	10143H
	1050RH7D2	Lodging		12Q02E	5/21/2021	5/23/2021	2		2/14/2021	2780.00	Held	Steve Deschenes	10143H
	1050RH7D2	Restaurant	The Bench	09F7XE	5/21/2021			7:15 PM	2/14/2021	300.00	Confirmed	Steve Deschenes	10143H
	1050RH7D2	Restaurant	Roy's	09F7XF	5/22/2021			6:30 PM	2/14/2021	300.00	Confirmed	Steve Deschenes	10143H

Held Items

You can see in the following image that some line items on this Lead Form have a status of **Held** instead of **Confirmed**.

Any item that is **Held** means that the item has not been marked “confirmed” in SMS. NAVIS will only interface revenue on items that have been confirmed. What that means is that the agent who booked this reservation will not receive credit for the revenue of any items with a **Held** status.

Start	End	Nights	Time	Created	Amount	Status	Guest Name	Guest #
22/2021	5/22/2021		7:30 AM	2/14/2021	1660.00	Confirmed	Steve Deschenes	10143H
23/2021	5/23/2021		7:30 AM	2/14/2021	2300.00	Confirmed	Steve Deschenes	10143H
21/2021	5/23/2021	2		2/14/2021	2780.00	Confirmed	Steve Deschenes	10143H
21/2021	5/23/2021	2		2/14/2021	2780.00	Held	Steve Deschenes	10143H
21/2021	5/23/2021	2		2/14/2021	2780.00	Held	Steve Deschenes	10143H
21/2021	5/23/2021	2		2/14/2021	2780.00	Held	Steve Deschenes	10143H
21/2021			7:15 PM	2/14/2021	300.00	Confirmed	Steve Deschenes	10143H
22/2021			6:30 PM	2/14/2021	300.00	Confirmed	Steve Deschenes	10143H

In the particular example above, the reason *some items are not marked as* **Confirmed** *in SMS is* because three of the four guests still need to pay their room deposits.

As each guest calls in to pay, the agent who takes their call will mark that room as **Confirmed**, after which the revenue will interface with this lead which will give the booking agent credit for that room.

Amount	Status
575.00	Held
415.00	Held
295.00	Held
3374.46	Held

In this second example via the image to the left, every single line item on this lead has a **Held** status.

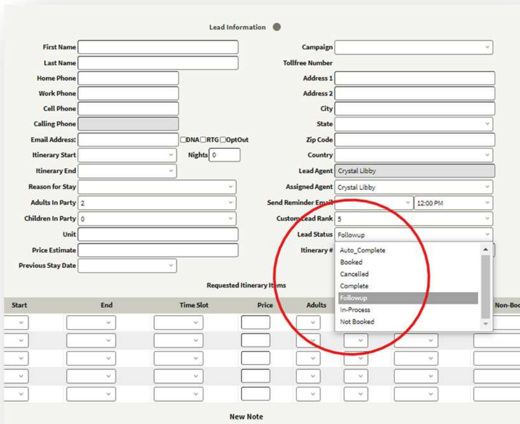
When all items are held, this is usually an indication that the Reservations Agent accidentally forgot to mark their reservation confirmed in SMS, and the Lead itself will have a revenue of $0.

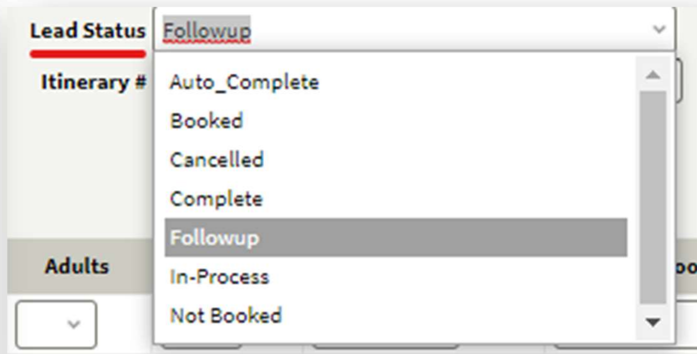
Regardless of how large this booking was, the agent will not receive any credit because it has not been **Confirmed** in SMS.

Lead Status

The Lead Status field of a Lead Form is critical.

This field is how Reservations Agents will categorize their leads as they progress with each guest from the initial conversation to the time of booking and even throughout and beyond their guest's visit.





Here is a simple explanation of the meaning of each Lead Status. We will dive deeper into each type of leader further in this manual.

Auto_Complete	This Follow Up Lead has gone untouched by an agent for 4 days
Booked	This guest has booked a room or recreation
Cancelled	This guest has cancelled every item on their itinerary
Complete	This lead form is not valid
Follow-up	This lead has not yet been worked by an agent
In-Process	An agent is currently working with this guest to secure a booking
Not Booked	This guest has decided not to book and is not flexible

How to Begin a Lead

Auto-Pop

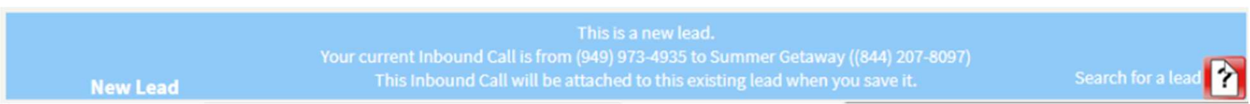
When an inbound call is received by a Reservations Agent, NAVIS will attempt to locate an existing lead that matches the phone number from which the guest is calling. This lead will automatically open into a new tab of your browser, which allows you to toggle back and forth between the Lead Form and The Hub.

- If a lead exists with that caller's phone number, that lead will automatically open
- If NAVIS does not find a lead with that phone number, NAVIS will open a blank lead and pull in as much information as possible from past reservations or the National Phone Database.

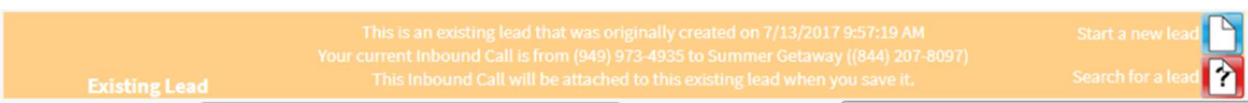
This process by NAVIS is called "**Auto-Popping**" the lead.

Once the lead opens in your new browser tab, you will see a color-coded information bar at the top of the lead that will clearly state whether the lead that has "popped" is an existing lead or a new lead. :

New – meaning it is the first contact for that caller



Existing" – The caller has contacted us before and their information has been saved by the previous agent with whom they spoke.



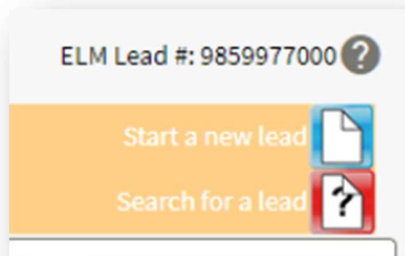
What if the Wrong Lead Pops?

NAVIS Auto-Pops are not always accurate. Occasionally, NAVIS will pull up an old lead that is no longer relevant for that guest, it will pull up a blank lead even though the guest says they have already booked or spoken with an agent, and sometimes it will pull information that is entirely unrelated to that caller.

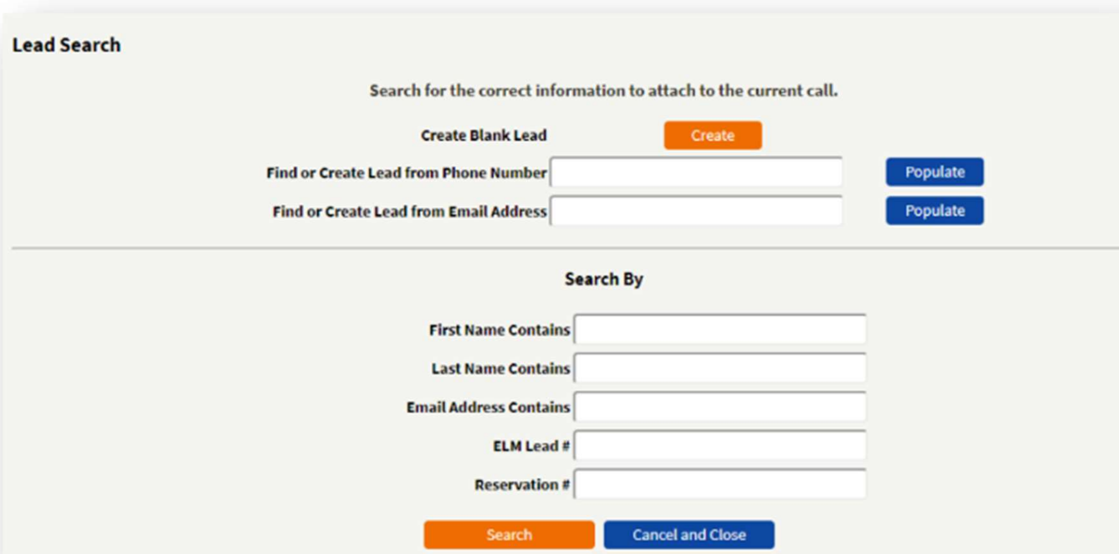
Common situations involving an Incorrect Auto-Pop:

- The caller has previously booked a stay with but is now calling for an entirely separate trip.
- The name information on the auto-popped lead doesn't match up with the caller with whom you are speaking
- A caller who has spoken with an agent previously has called back from a different phone number that is not connected to their profile in SMS or their initial NAVIS lead
- The caller is inquiring about a reservation that was originally booked by a spouse or other travelling companion.

If you find yourself on a call in which NAVIS has auto popped a lead that does not match the caller, the simplest way to locate the correct lead is to click the red question mark next to "**Search for Lead**" in the top right corner of the lead form.



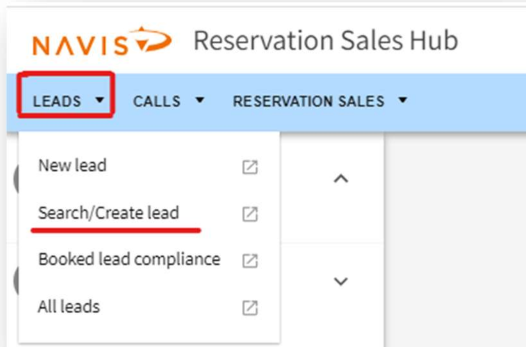
This will open the **Lead Search** page:



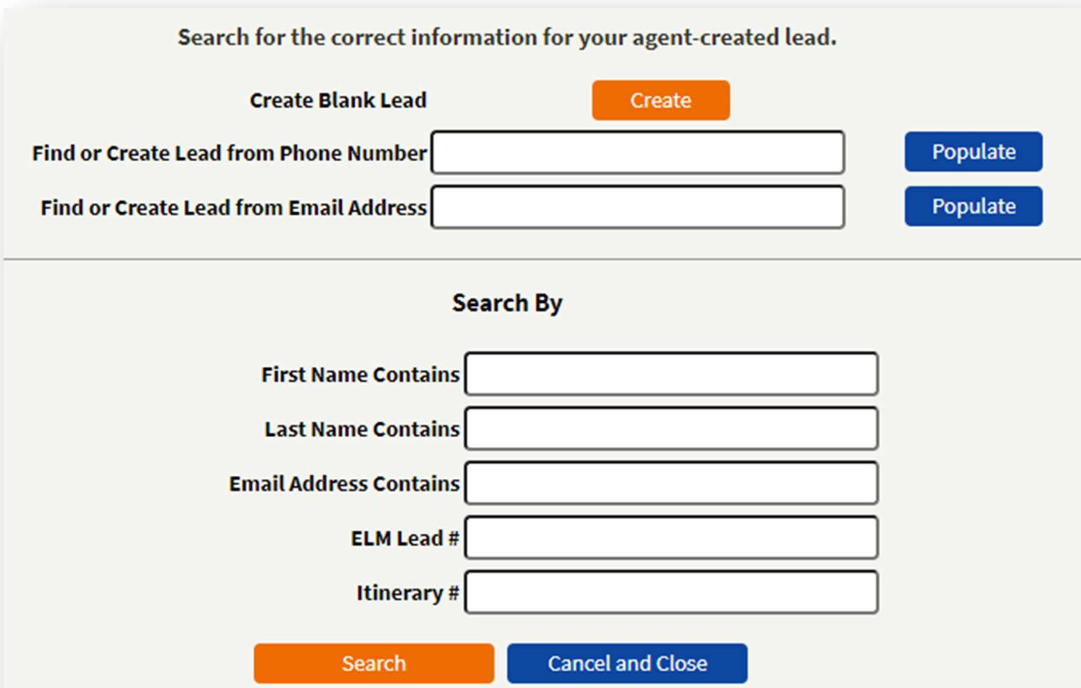
This search tool is explained in the next section titled "**How to Search for An Existing Lead**"

How to Search for An Existing Lead

To Search for A Lead:

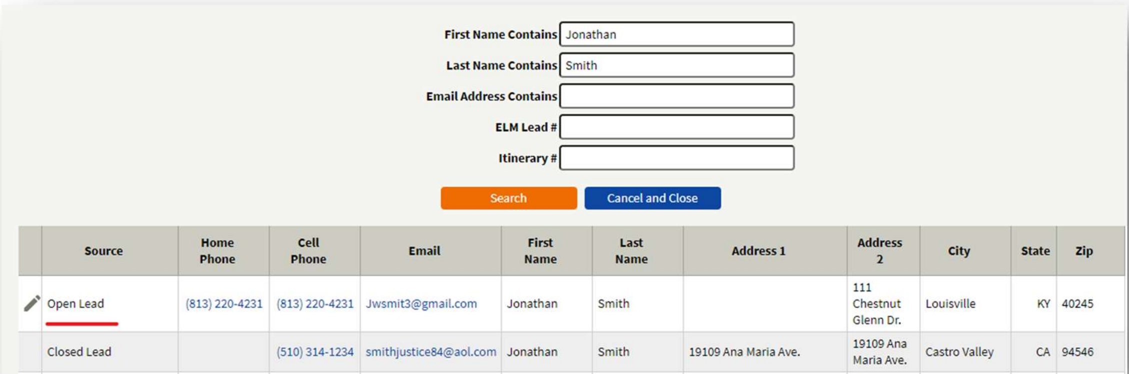


- Begin at The Hub
- Click the "Lead" button on the toolbar located in the top left corner.
- Select "Search/Create lead"
- This will open the Lead Search page in the *Reservations Sales Suite*



Email Address	This is the best way to locate a Vacation Planner. Ask the caller which email address they used when they submitted their request on our website.
Itinerary Number	This is the best way to locate the lead for an SMS booking
Name	"Name Contains" means you do not need to type out the entire name to see results. This is helpful when searching for a name for which you are unsure of the spelling

- Click "Search and select the appropriate lead from the list of options.
- Open Leads will be at the top.
- If the lead is marked "Closed," this means it is an old lead and has been archived.



- Select the lead by clicking the pencil icon. This will open the lead in a new tab of your browser.

Tip: When opening an existing lead, be sure to always scroll to the bottom to view the notes. You can make small talk with the guest about their booking to buy yourself time to quickly review past notes.

"What brings you to the area?"

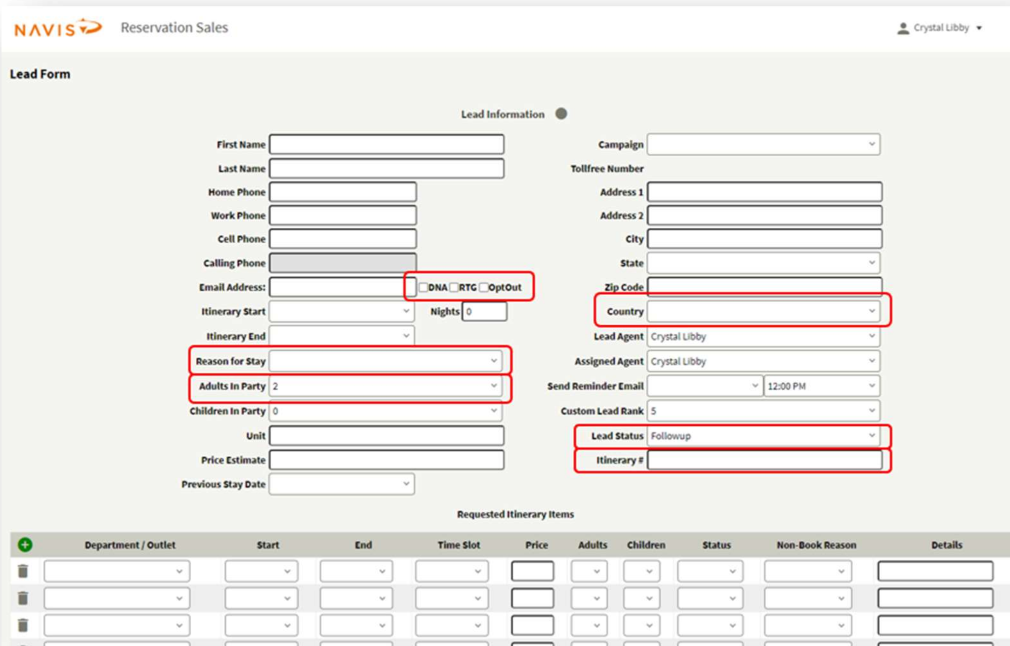
"Are you celebrating a special occasion?"

How to Complete A Booked Lead

When a Reservations Agent books in SMS, the majority of the guest's information has already been inputted into their SMS guest tile and their Reservation tiles.

During your call, you can focus on inputting everything correctly into SMS as you book, then once you are finished, NAVIS makes it easy to pull the information you just entered from SMS into your NAVIS lead. This is referred to as *interfacing*.

Since NAVIS can interface so much information from SMS, a "booked" Lead form is the simplest Lead to fill out. In the image below, *only the areas circled in red are required to be filled out manually*. Once you click "Save and Edit," the remaining data fields will auto-populate.



Booked Lead Required Fields:

- Next to the email address field, check the box that says "DNA"
  This will ensure the email address is pulled by NAVIS from the Guest Tile you created in SMS
  If your guest declined to provide an email address, check "RTG" (Refused to Give)
- Select the appropriate "Reason for Stay" from the dropdown menu
- Select the "Country"
- Set the "Lead Status" to "Booked"
- Enter the Itinerary Number from SMS
  This will ensure all the dates, revenue, and contact information is pulled by NAVIS from the Reservation that you created in SMS
- Scroll down to the "New Notes" box to type your notes about the call

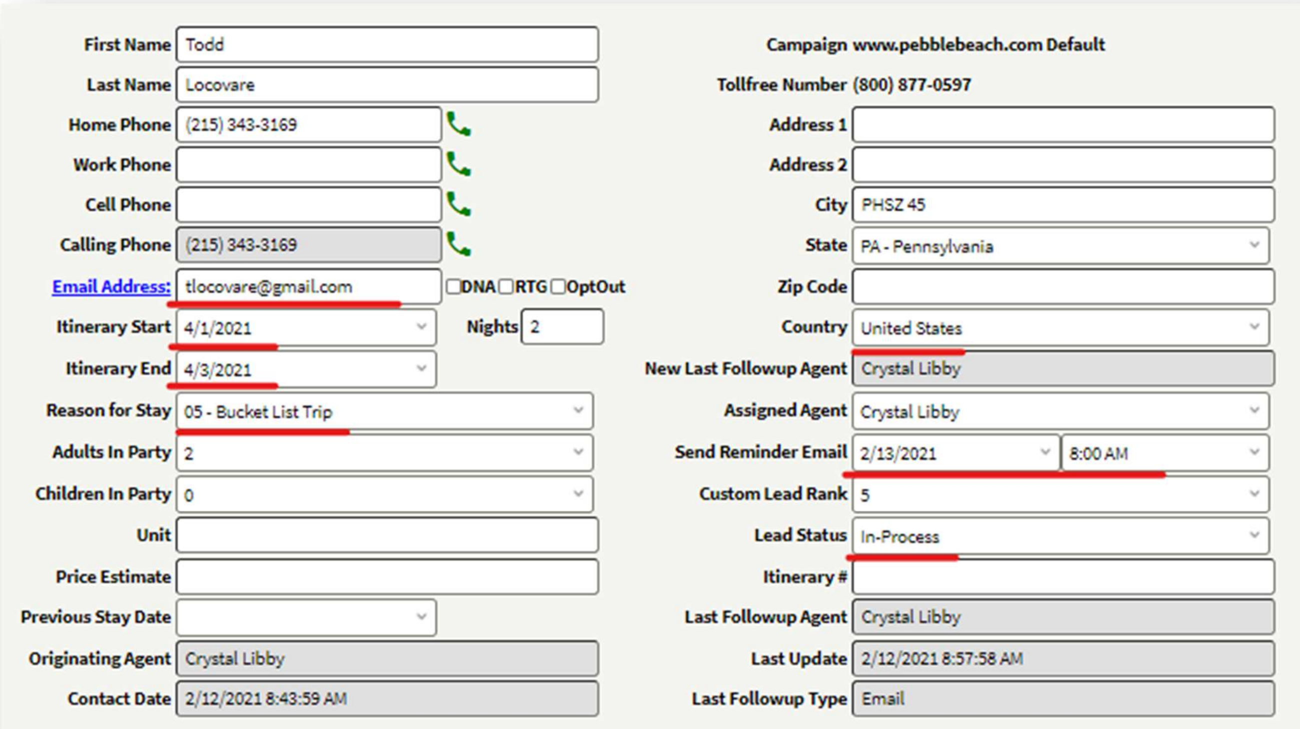
How to Complete A Hot Lead

When you speak to a guest who is interested in booking and has expressed interest in a follow up contact, either by email or phone, your lead status should be "**In Process**" and your Disposition should be "**Hot Lead**."

Hot Lead Required Fields:

Name	Include phonetic pronunciation when helpful
Phone Number	Verify the best phone number to reach the guest. Do not assume the best number is the one they are calling from initially.
Email Address	Always ask for the email address. • If they decline to provide it, check the RTG (Refuse to Give) box. • If you check DNA (Do not ask), you will be out of compliance.
Itinerary Start & End Dates	These fields should be set to the dates you discussed with the guest. If you discussed multiple sets of dates, enter the ones they were most interested in, then include all options you discussed in your notes.
Reason for Stay	You should always be asking the guest the reason for their visit as part of your initial probing questions.
Country	This is a required field to save a lead.
Lead Status	A Hot Lead will always have the "In-Process" Status
Reminder Date and Time	You must always have a reminder set for a Hot Lead. • This will usually be the day and time you agreed to give the guest a follow up call. • If you are only sending the guest an email, set the reminder for one week from the current date so you can send a follow up email if they have not yet replied.
Notes	This note should be very detailed and comprehensible to any agent who looks at this lead in the future and should include: • Who the caller is • Why they are visiting • What booking option(s) you offered • The reason they did not commit to booking now • What type of follow up you will be conducting

The following example is a properly filled out Hot Lead form:



How to Complete A Not Booked Lead

Why should I save so much information for a guest who didn't even book?

As we have discussed earlier in this manual, Leads are of vital importance to several departments within Pebble Beach Resorts. ***Not-Booked Leads*** are potentially the most important of all.

- **Revenue Management** can see how many people did not book for the same reasons which his can lead to the decision to adjust pricing or change policies.
- The **Marketing** team can send targeted email to guests who did not book for this reason.
- For **Reservations Agents**, Not-Booked Leads are extremely useful should that guest call back.

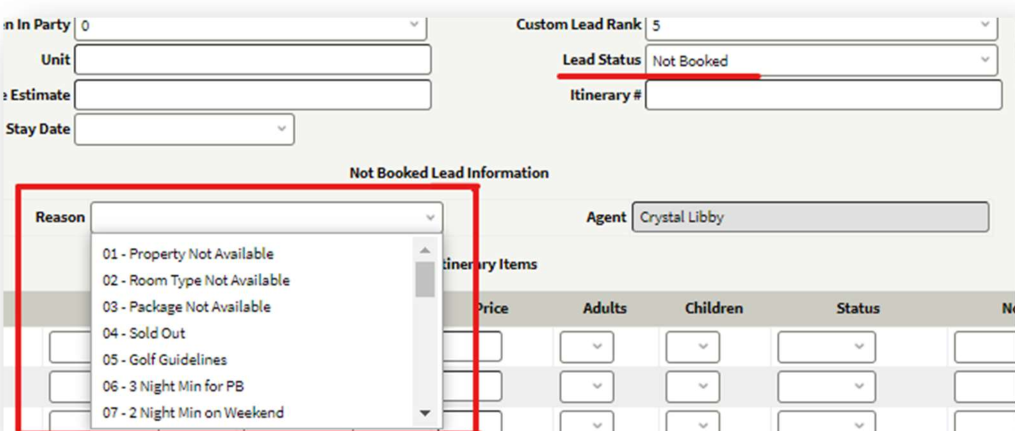
A lead should only be marked as "**Not Booked** after the Reservations Agent has done everything possible to secure the reservation.

This includes but is not limited to:
- Creating excitement for the guest by talking up our properties and services
- Suggesting alternative times/dates/services
- Offering discount rates when appropriate
- Offering follow up calls

Even if you mark a lead as Not Booked, this is not necessarily the end.

If that guest calls back tomorrow, or a week later, or even a year later, NAVIS will attempt to route that caller to back to you since you have an existing relationship.
It is common for Not-Booked Leads to turn into Booked Leads down the line, so you do not want to miss out on that booking opportunity by not saving a detailed lead every time you discuss rooms!

Reason Code:
On the Lead Form, once you change your Lead Status to "Not Booked," a box labeled "Reason" appears.



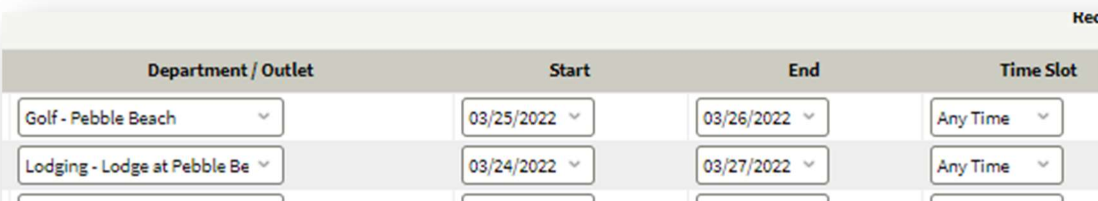
Guest Data

The following fields must be completed before a Not Booked Lead can be saved:

1. Guest Name (NAVIS will allow you to save your lead without the name, but you should always fill this out for each caller)
2. Email address – If they decline to provide this, select "RTG" (Refuse to Give)
3. Dates of Stay
4. Reason for Stay
5. Country

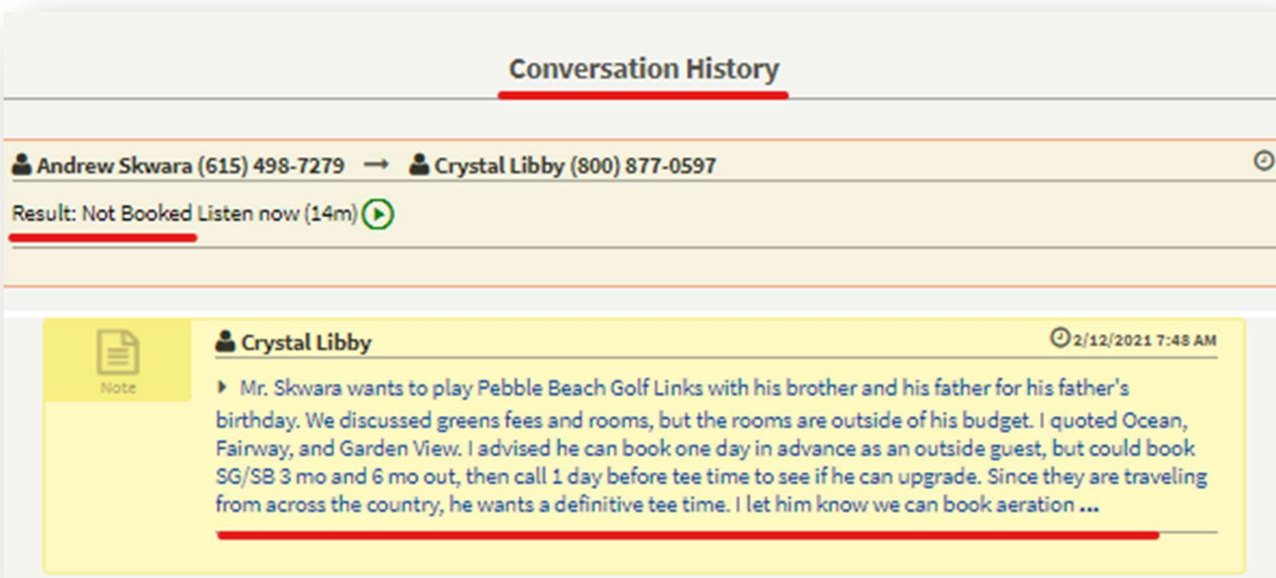
Requested Itinerary Items

This tool in the Lead Form is an easy way to clearly select which items, dates, times, and prices you reviewed with your guest during your call.



Notes

It is crucial to write a detailed Note explaining exactly what the caller was looking for, what you offered, and why the guest ultimately declined to book.



Not Booked Reason Codes

Common Reason Codes

Property Not Available	No availability at their desired Resort Property
Room Type Not Available	No availability for any room types they wish to book
Golf Guidelines	A resort guest meet Day Guest booking guidelines
3 Night Minimum for Pebble Beach	The guests cannot meet the minimum night stay requirement.
Desired Time Not Available	A resort guest declined to book due to golf unavailability
No Response	A Hot Lead or Vacation Planner Lead has not received a response after three attempts at outreach
Interested Guest Refused Follow Up	A guest wants to continue planning their trip but has declined the agent’s offer for a follow up call or email.

Uncommon Reason Codes

Package Not Available	
Sold Out	
2 Night Minimum on Weekends	
Dates over Special Event	
Price too High	
Price too High – Negotiation Offered	
Cancellation Policy	
Deposit Requirement	
Course Conditions	A resort guest declined to book a golf course when scheduled maintenance/aeration is occurring
Resident Member Golf Guidelines	
Provider Not Available	A Spa guest declines to book because a specific provider or gender of provider is unavailable
Facility Buyout or Closed for Maintenance	
Resource Not Available	A Spa resource or service is unavailable
Purchased Gift Card for Stay	A Hot Lead decided to purchase a gift card to allow their guest to plan the trip themselves.
Waitlist	
Price too High – Upgrade Offered	
FWY1 Cottage Bedding	A guest did not book because they desire a different bedding configuration for the FW1 Cottage
FWY1 Cottage Booking Guidelines	
FWY1 Cottage Price too High	
FWY1 Cottage No Ocean View	
Turnover to Other Department	The lead was given to Group Sales, Club Pro, CCS, or Tournaments

How to Update an Existing Booked Lead

Very often, Reservations Agents will need to take calls from guests who have already booked with Pebble Beach.

When receiving a call for a guest with an existing booking, you should immediately:

1. Copy/paste the Itinerary number from the lead's Data section into SMS and pull up the booking.
2. Do a quick scan of the Notes on the existing Lead Form.

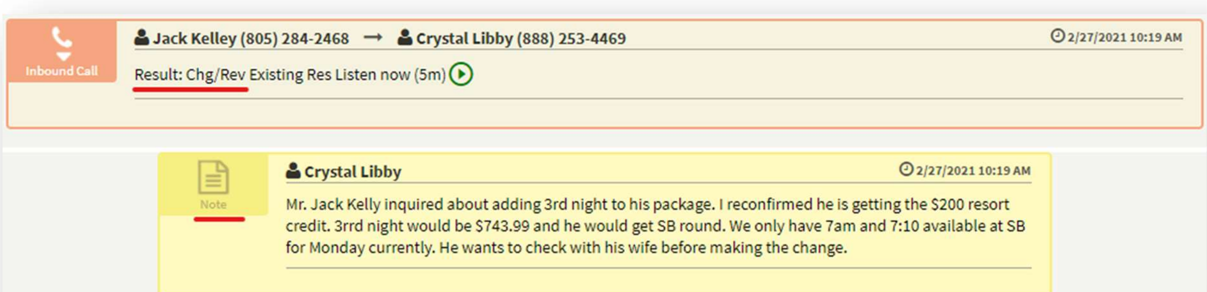
The Disposition Code for Existing Bookings will be one of these three options:

Reconfirm	You provide information to the guest, but do not modify their booking
Change/Revise	You add, subtract or change something about the guest's booking
Cancel	You cancel the guest's *full* Itinerary

Reconfirm

When a Disposition Code is marked **Reconfirm**, this means that you discussed the booking with the guest, but ultimately did not make any changes. Regardless of where the conversation with that guest has taken you, if at the end of the call, you can say "no changes made," you should mark your Disposition as "Reconfirm."

Even though nothing has changed, it is still important to leave a detailed **Note** about your call. Doing so creates a record of what that guest is considering about their trip, which will help the next agent who takes a call from that guest.



Since no changes were made, the **Lead Status** will remain as "Booked."

Change/Revise

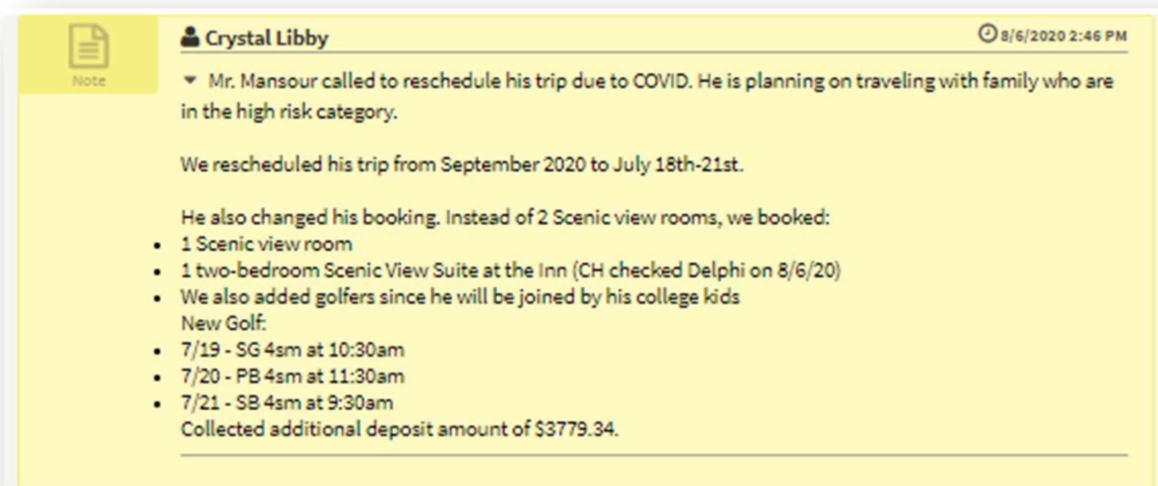
The **Change/Revise** Disposition Code means you have modified something about the existing reservation such as:

- Adding golf, rooms, rec, etc.
- ✓ Cancelling part of their Itinerary (not a full cancellation)
- ✓ Rescheduling recreation or room stay dates
- ✓ Updating information in the Guest Tile, Profiles, Notes, Traces, etc.

When creating a **Note** for a booking that you have modified, you must ensure that your notes are thorough enough to answer these questions:

1. *Who did you speak to?*
2. *What did they change?*
3. *Why did they change it?*

Some notes will be short and simple, but with big changes, it is crucial to be clear and detailed:


Note

Crystal Libby 8/6/2020 2:46 PM

Mr. Mansour called to reschedule his trip due to COVID. He is planning on traveling with family who are in the high risk category.

We rescheduled his trip from September 2020 to July 18th-21st.

He also changed his booking. Instead of 2 Scenic view rooms, we booked:
- 1 Scenic view room
- 1 two-bedroom Scenic View Suite at the Inn (CH checked Delphi on 8/6/20)
- We also added golfers since he will be joined by his college kids

New Golf:
- 7/19 - SG 4sm at 10:30am
- 7/20 - PB 4sm at 11:30am
- 7/21 - SB 4sm at 9:30am

Collected additional deposit amount of $3779.34.

Regardless of the changes made, your **Lead Status** will remain as "Booked."

Cancellations

The only time a Lead and Disposition Code should be marked as **Cancelled** is if, after the call, there is nothing remaining on that guest's Itinerary.

Example 1

A guest calls in to cancel their reservation because they have conflicting travel plans. The room, golf, and restaurant reservations are cancelled. Your Disposition Code should be **Cancelled**.

Example 2

A group of four golfers, all of whom have their own rooms, need to cancel their trip. Each guest paid their own deposit, so all 4 guests will need to call in separately to cancel their rooms and be refunded.

Guest #1 calls and cancels. Your Disposition code should be **Change/Revise**. The lead status should still remain as Booked.

Guest #2 calls and cancels. Your disposition code should be **Change/Revise.** The lead status should still remain as Booked.

Guest #3 calls and cancels. Your Disposition Code should be **Change/Revise.** The lead status should still remain as Booked.

Guest #4 calls and cancels. Your Disposition Code should be **Cancelled** because you will now have cancelled the final items on this Itinerary. The **Lead Status** should be changed to **Cancelled**.

How to Manage Your Leads

As you gain experience as a Reservations Agent, you will develop a natural rhythm for speaking to guests, writing to guests, and following up with Leads.

While it is possible to manage your prospective bookings entirely through NAVIS via the **Action Center**, many agents create their own system to stay on top of their work. This is certainly optional, but you may find that that *tracking things your way* helps to keep yourself organized and close more sales.

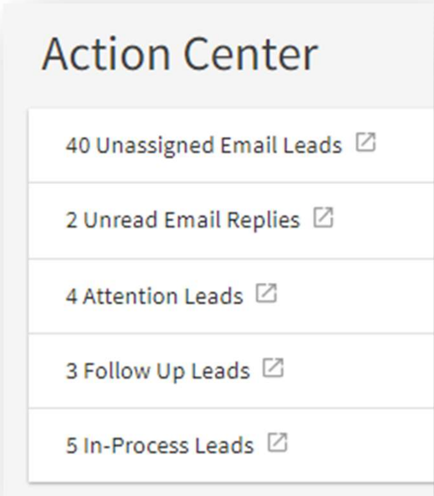
Self-Management Example:

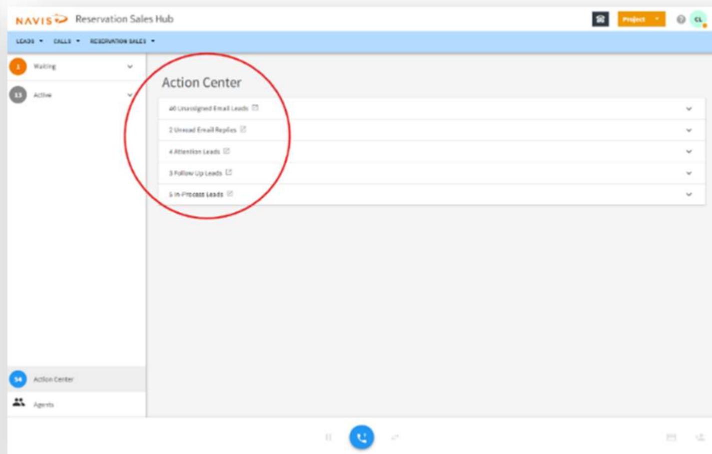
This is a real example of a Reservations Agent's method for managing their **In-Process** leads.

Name	Last Contact	Reminder Set	Booking Timeframe	Details
[Guest Name with Hyperlink to Lead]	2/14	2/20	June/July	"I like a nice place to stay" - She is sold on Ocean Deluxe - upsell her to Viscaino Suite
[Guest Name with Hyperlink to Lead]	2/16	5/21	May 2022	C/L Casa Courtyard - Approved by Joe
[Guest Name with Hyperlink to Lead]	2/18	2/23	July 2022	VP - left vm, sent quote
[Guest Name with Hyperlink to Lead]	2/24	3/3	April	VP - left vm, sent quote, no golf

Managing Leads in the Action Center

Early in this manual, we had a brief look at the **Action Center** of The Hub, which we described as your "**To Do List**" within NAVIS. Now that you understand more about Leads and the various lead statuses, let's take another look at our To Do List:





As you take calls and create leads in NAVIS, you will build up a list of ongoing leads that you will work on over time. The Action Center helps you keep track of these leads so you can progress in an organized fashion from **Follow Up** to **In-Process** to **Booked** (or **Not Booked**).

You will be assigned **Project Time** by your supervisor or manager several times each week, during which you can work on these ongoing leads. There are several tasks each agent must take care of during their designated Project Time hour, but the most important task is to follow up with prospective guests.

If you properly manage your Action Center, you will NEVER:

1. Miss a follow up call appointment
2. Forget to reply to a guest's email
3. Neglect to reach out to a Vacation Planner Inquiry
4. Miss an important update made by another agent on one of your leads
5. Lose an opportunity to book a guest who was not ready to finalize on the first call

Action Center Dropdown Categories

Unassigned Email Leads

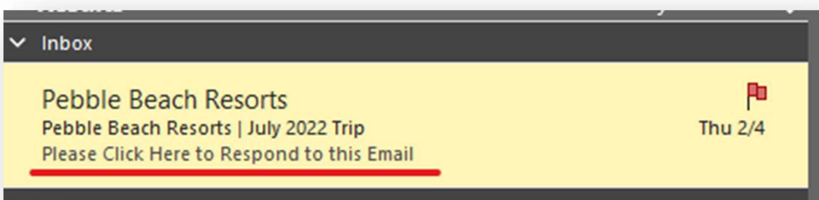
This drop-down shows all Vacation Planner Leads that have yet to be assigned to a Reservations Agent. Only supervisors and managers will enter this section to assign leads to specific agents.

**As a Reservations Agent, you do not need to worry about this dropdown. Managers and Supervisors will assign each of these leads to specific agents throughout each day.*

Unread Email Replies

When a guest replies to an email that they have received via NAVIS - and that Lead is assigned to you - the lead will appear under this dropdown menu.

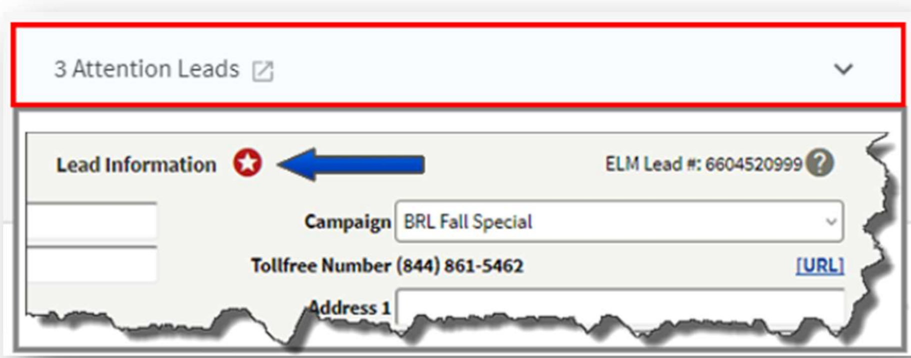
Additionally, agents will receive email alerts to Outlook:



Attention Leads *(a.k.a. Starred Leads)*

This is where new Vacation Planner leads will appear once a supervisor or Manager assigns them to you, and where "starred" Leads will appear when another agent wants to bring a specific lead to your attention.

To mark a lead as an "Attention Lead", click the star at the top of the Lead Form. This star is a toggle, so to remove the lead from your Attention list, click the star again. The red button will turn back to gray.



Follow Up Leads

Follow-Up is the default status for all new leads. When a supervisor or manager assigns a Vacation Planner to you, that lead will appear in both your "Attention Leads" dropdown and your "Follow Up Leads" dropdown in the Action Center

A Follow Up Lead must be "touched" at least once every four days or NAVIS will automatically change the lead status to "Auto-Complete." This should never happen. This is why it is very important to check for newly assigned Vacation Planners every single time you have Project Time scheduled.

As soon as you begin the process of contacting a Follow Up Lead (i.e. you have called, left a voicemail, sent an email, etc.), you should immediately change the lead status from "Follow Up" to either "In-Process," "Booked," or "Not Booked."

In-Process Leads

When a Lead status is marked as "In-Process," this means:

1. The guest has not yet booked with Pebble Beach
2. The guest has shown serious interest in booking
3. The guest has agreed to a "next step" such as a follow up call or email

This dropdown is where your "Hot Leads" will remain until you conclude your interaction with those guests and either mark the lead as "Booked" or "Not Booked."

As you improve your sales skills, you will see the number of "In-Process" Leads increase. However, it is important to make sure that the number of In-Process Leads in this section does not exceed approximately 10 leads.

An excess of In-Process Leads in your Action Center is most commonly a result of the following:

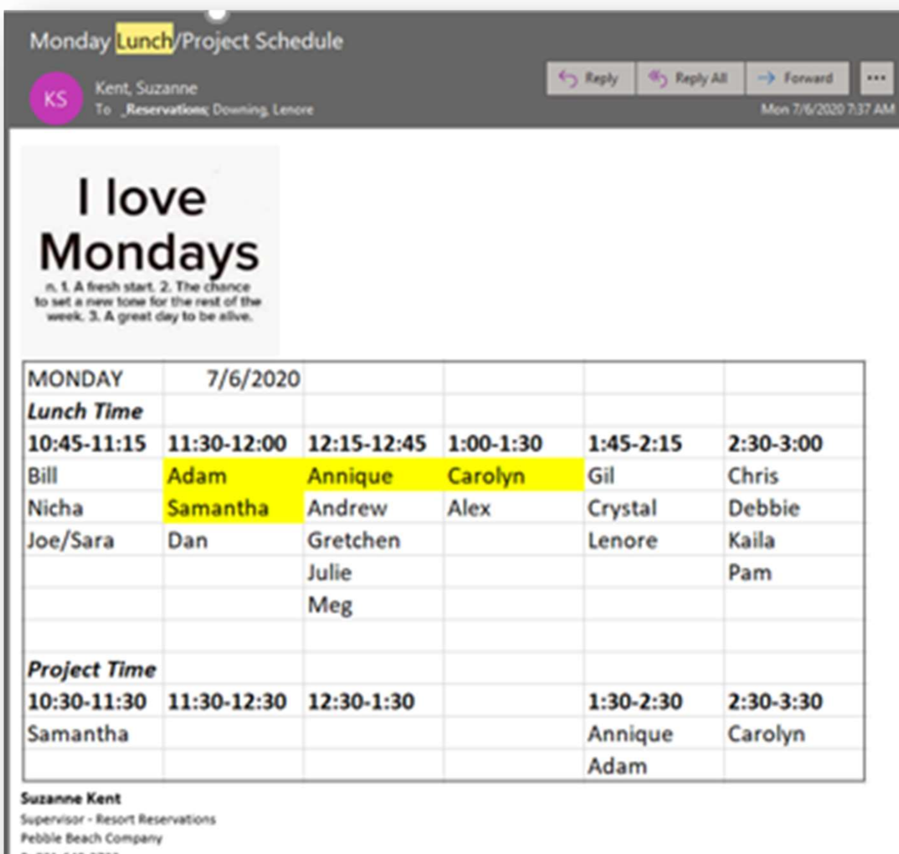
1. You have some leads saved for callers who are not going to book and should therefore change their lead status to "Not Booked"
2. You have already booked some of these leads, but forgot to update the status to "Booked"
3. You are not following up with guests in a timely manner or some guests have fallen off of your radar by mistake
4. You are taking on too many Vacation Planners – speak to your supervisor for advice on how to get your In-Process Leads down to a manageable number

Project Time

Every agent is given three hours per work week that is completely theirs, which is referred to as **Project Time**. During this uninterrupted time, instead of taking inbound calls, agents can take care of the following:

Project Time Checklist

1. Make/Send Follow-Ups Calls and Emails for Hot Leads
2. Correct your Call Compliance
3. Complete your 10 Day Arrivals
4. Review Your Booked Leads & Itineraries for Accuracy
5. Check Your Call Conversion Stats for the Month
6. Listen to your calls to work on your sales skills
7. Study your Resort Knowledge & SOP Materials



Monday Lunch/Project Schedule

KS Kent, Suzanne
To _Reservations; Downing, Lenore
Reply | Reply All | Forward
Mon 7/6/2020 7:37 AM

I love Mondays
n. 1. A fresh start. 2. The chance to set a new tone for the rest of the week. 3. A great day to be alive.

MONDAY	7/6/2020				
Lunch Time					
10:45-11:15	**11:30-12:00**	**12:15-12:45**	**1:00-1:30**	**1:45-2:15**	**2:30-3:00**
Bill	Adam	Annique	Carolyn	Gil	Chris
Nicha	Samantha	Andrew	Alex	Crystal	Debbie
Joe/Sara	Dan	Gretchen		Lenore	Kaila
		Julie			Pam
		Meg			
Project Time					
10:30-11:30	**11:30-12:30**	**12:30-1:30**		**1:30-2:30**	**2:30-3:30**
Samantha				Annique	Carolyn
				Adam	

Suzanne Kent
Supervisor - Resort Reservations
Pebble Beach Company
P: 831-649-2733

Each day, a supervisor or manager will send out an email with the daily schedule.

The agents who have **Project Time** scheduled that day will be highlighted in yellow.

The specific time window for each agent’s Project Time is included below the **Lunch** schedule.

As you can see in this example, on this particular Monday, **Adam** is scheduled for Project Time from **1:30pm to 2:30pm**

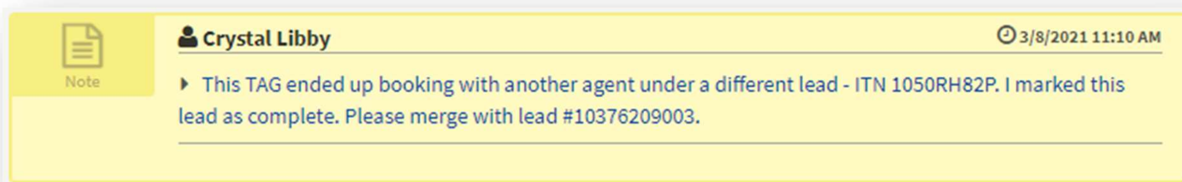
Complete and Auto-Complete Leads

Complete is a very uncommon lead status that is only used when the lead itself is invalid, such as a Vacation Planner that does not have valid contact information and therefore cannot be addressed. It is good practice to consult a supervisor before marking any lead as "Complete."

Complete and Merge

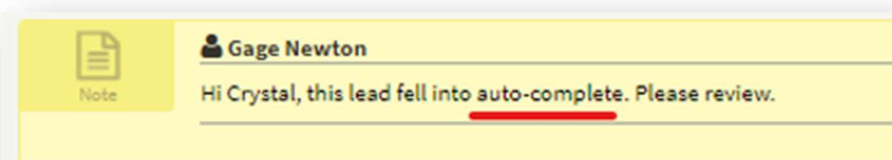
The most common scenario that will require you to mark a lead as Complete is when a guest you have been working with ends up booking with another agent on a separate lead form than the one you created.

We cannot have two lead forms for one booking, so the leads will need to be merged together. To have your lead merged into the lead that contains that guest's booking, you should mark your lead as Complete then leave a Note that states "*Please merge with Lead #xxxxxxxx*." Supervisors and managers will sort through Complete leads on a regular basis to merge these leads.



The **Auto-Complete** status is automatically generated by NAVIS when a Follow Up lead has not been addressed within four days. *This lead status should never be used!*

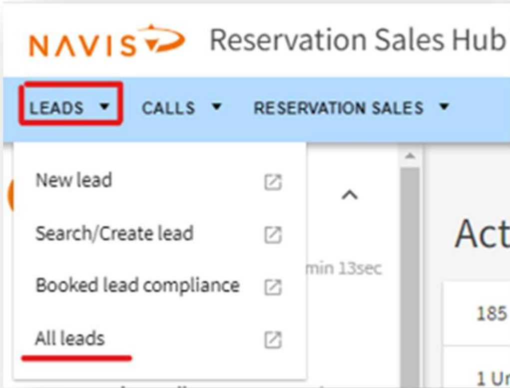
If your leads end up being marked as "Auto-Complete," that indicates that you are not correctly managing your Follow Up leads. Supervisors will regularly check to see if leads have fallen into Auto-Complete status to make sure they are addressed. If they find a lead of yours in this status, you will receive a message like the following:



The reason Auto-Complete is problematic is because a lead should only be in **Follow Up** status if that guest **has never been contacted by an agent.** We should never make a guest wait more than four days for us to respond to their first message. **It is our policy to contact guests within 24 hours of them reaching out to us.**

If you have already spoken to a guest but need more time to work on the booking, your Lead Status should be **In-Process**. In-Process leads do not have a time limit and **will never be automatically changed to Auto-Complete.**

How to Search for Auto-Complete Leads



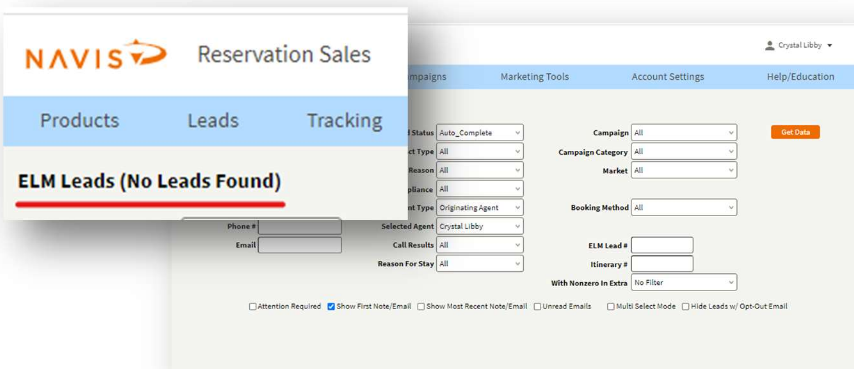
It is great practice to check regularly if any Follow Up leads have slipped past your attention and fallen into Auto-Complete.

Begin in the Hub at NAVIS.

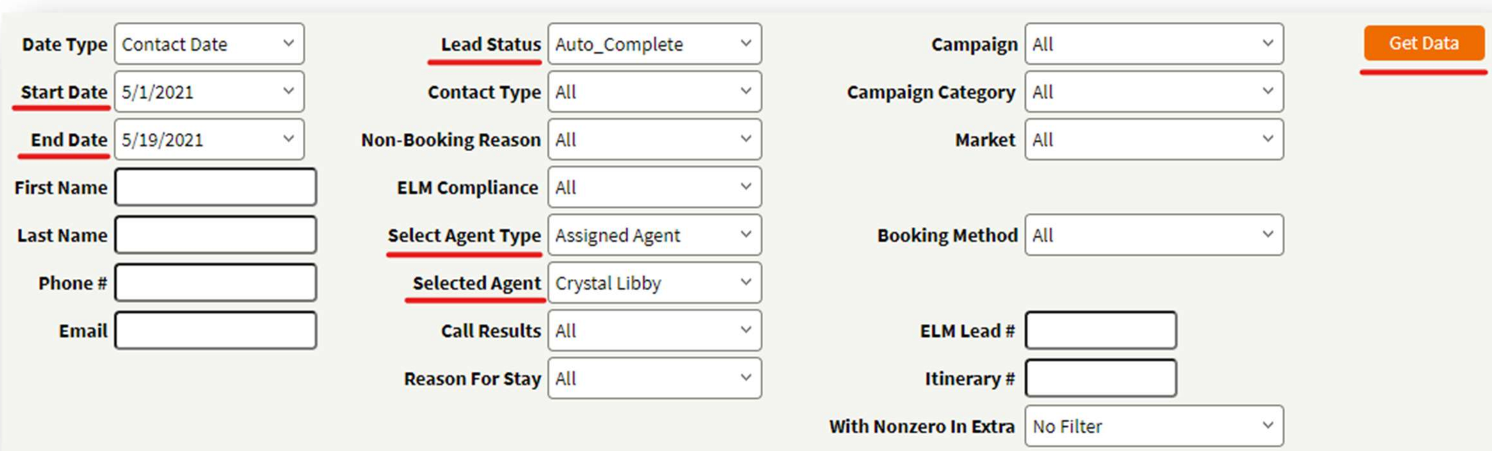
Click the "LEADS" tab in the Toolbar

Select "All Leads" from the dropdown menu

This will open the "ELM Leads" search page which defaults to "No Leads Found."



Complete the following fields to determine if leads assigned to you that have fallen into Auto-Complete. Hit "**Get Data**" to see results.



Booked Revenue Ownership

One of the critical components of the Reservations Incentive plan is that Agents properly assign credit for the booking. It's essential that everyonepractices "Trust & Integrity" when handling leads and assigning credit.

Hot Lead / In-Process Status:

1. If the guest asks for the originating agent by name, you must get the guest to that agent even if it may involve the agent calling the guestback. Only offer to help the guest if there is no possible way to get them to that agent in that moment or the guest refuses a call back. If you end up easily booking the exact components of the itinerary that was discussed by the original agent, then the credit should go back to that original agent (barring any other outlying circumstance).
2. If you notice that the guest has already been working with an agent extensively and did not ask for them, mention it — "I see you have been working with Tara, would you like me to see if she is available?" If they refuse or the agent is not available, please help the guest. If you end up easily booking the exact components of the itinerary that was discussed by the original agent, then the credit should go back to that original agent (barring any other outlying circumstance).
3. Your leadership team does reserve the right to review any credit disputes, where there is an outlying circumstance, and once a decision ismade it is final.

Vacation Planner Leads:

- All Vacation Planner leads must be passed out to each of you based on which leads are the oldest in the bucket and then assigned at random. An assigned VP does not mean you own the lead. You are getting the conversation started. If you only make an outbound call resulting in a voice message and send the generic intro email, you still do not truly own this lead.
- If you reached the guest and had a conversation but did not close the business and/or ask for a specific follow-up, you partially own this lead. If another agent spends the same or more amount of time with the guest when they call back and closes the deal, that agent will get the credit for the lead.
- If you actually reach the guest and had a conversation that resulted in a booking or you made a specific follow-up appointment and set the reminder in the lead, you own this lead and credit should come back to you.

Inbound Call/Outbound Call Leads:

- If on your call you had a conversation but did not close the business and/or ask for a specific follow-up, you partially own this lead. If another agent spends the same or more amount of time with the guest when they call back and closes the deal, that agent will get thecredit for the lead.
- If on your call you had a conversation that resulted in a booking or you made a specific follow-up appointment and set the reminder in thelead, you own this lead and credit should come back to you.

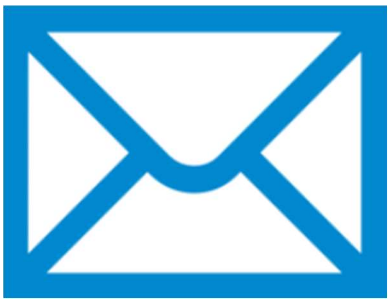
If an Agent does not assign credit as outlined above, they will be disqualified from both the Team and Individual Incentive for the current incentive period.

Tim Ryan, Vice President of Sales, 2021

Emails

Every Reservations Agent has a company email inbox with Outlook.

However, when we send emails directly to guests or potential guests, we send the email through NAVIS instead. We do this for three reasons:



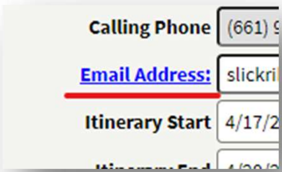
- The email we send from NAVIS is automatically attached to the Lead that has been created for that guest, which means all booking details and notes are easily accessible.
- When an email is sent through NAVIS, that email is visible to anybody agent who opens that lead, creating visibility of all contact between agents and guests. This makes it easy for a fellow agent to pick up the conversation right where the previous agent left off should that guest reach out to us again.
- Within NAVIS, there is an extensive list of pre-programmed template emails that agents can use to convey common messages in a standardized format.

How to Send a Navis Email

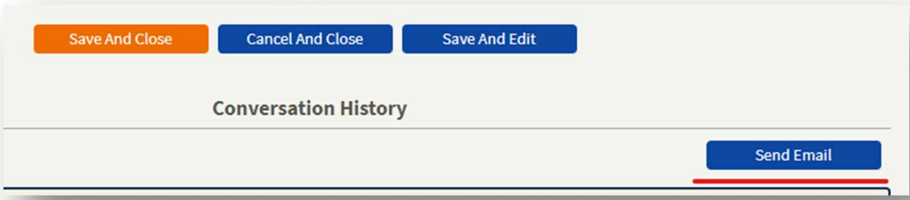
To access the email feature of NAVIS, you must either open an existing lead or create a new lead. The email address field must be filled out and the lead must be saved.

Once the email address is saved to the lead, there are two ways to access the email feature:

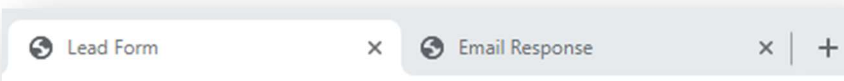
1. The title of the Email Address field will be hyperlinked:



2. A button will appear on the lead at the top of the Conversation History section:

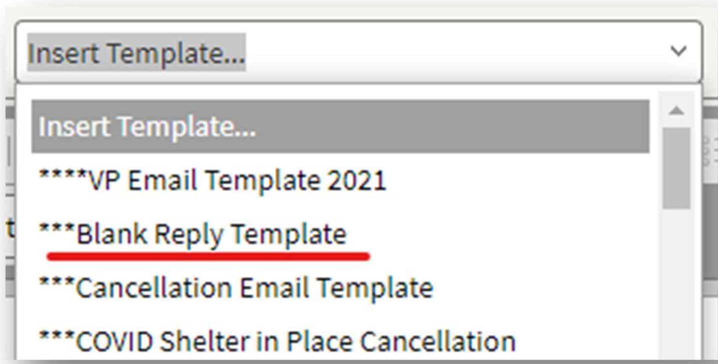


The **Email Response** page will open in your current window. If you want the Email Response page to open in a separate tab so you still have access to the Lead Form, *hold CTRL as you click the email link*.



From the new window, you can select an email template to help you organize your message to your guest.

Templates will be addressed in the following pages of this manual, but if you do not want to use a template, you still need to select from the dropdown "Blank Reply Template." So your email is set to our standardized Pebble Beach format.

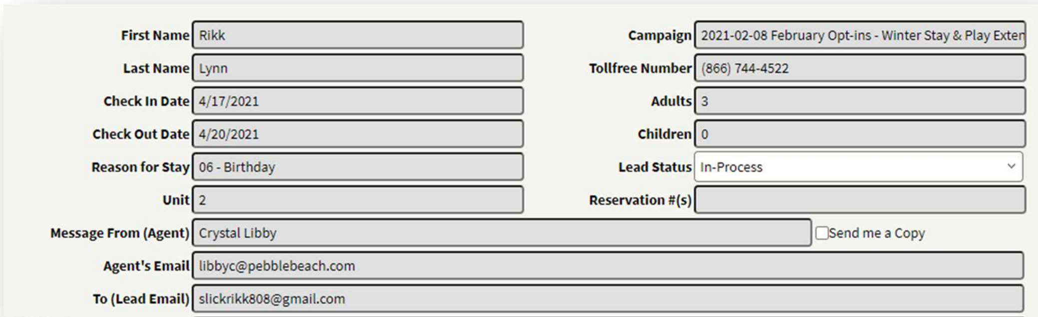


The email will automatically be addressed to the guest from your Lead Form, but you will need to edit the greeting for the appropriate "Mr./Mrs./Ms." title.

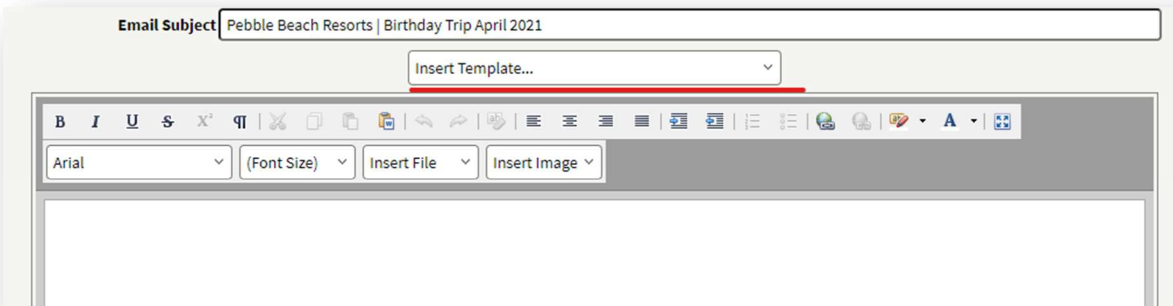
When you are done crafting your email, click Send and Edit.

Email Response Window

THE TOP of the Email Response window will have data from the saved lead.

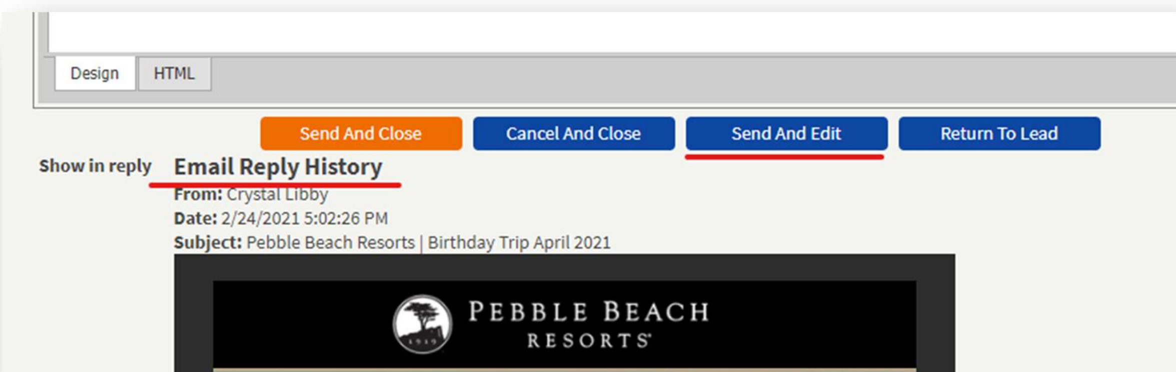


THE MIDDLE SECTION is where you will select your template and type the body of your email.



THE LOWER SECTION is where you will see options to "Send and Edit" your email, which will send the email and take you back to the lead form for you to review.

This lower section also will have the Email Reply History which shows every email that has previously been sent and received on this lead.

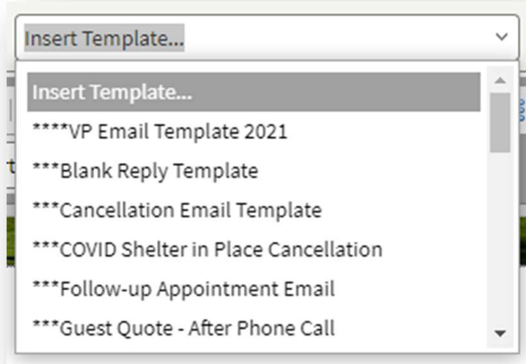


Email Templates

The use of pre-formatted templates when corresponding with your potential guest is a powerful tool. Not only does it save time, but it ensures a consistent message is sent from all of your reservation sales agents.

Benefits of Templated Email Correspondence with Guests:

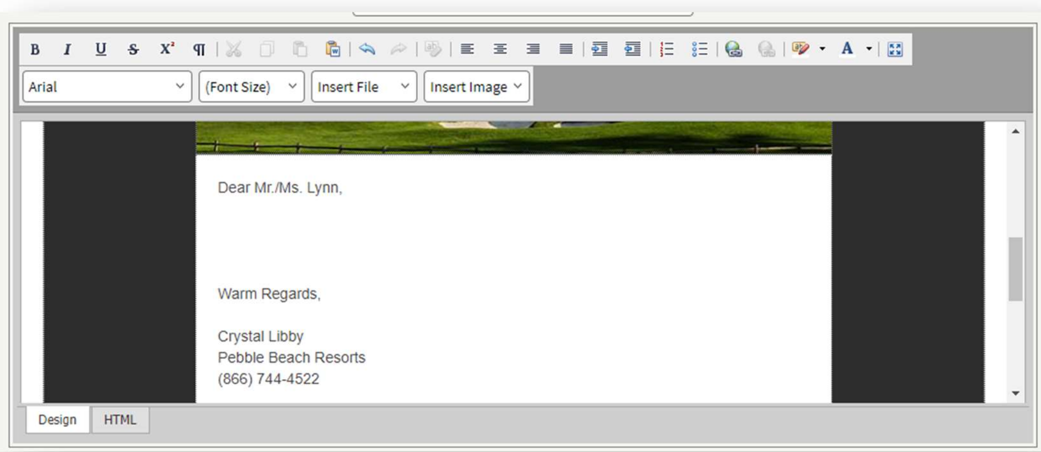
1. The ability to easily obtain email addresses for future marketing purposes.
2. Email addresses provide another "touch" or contact point for your lead. The more you can touch your lead the more likely you will book them.
3. Sending an email is a branding opportunity to keep Pebble Beach in the guest's mind.
4. The Email History leaves a convenient record of the conversation in the potential guest's email inbox that the guest can forward or refer to at a later date.



It is important that all emails sent to guests by Reservations Agents are professionally written, consistent with emails from fellow agents, and include necessary information to move the conversation forward. That is not to say that you cannot put your own spin on the emails you send to your guests. Many agents will start with a template in NAVIS to create the basic outline of their email but fill in blanks and add additional information and references to the specific conversation they had with the guest.

Personalization is greatly encouraged. By personalizing the conversation, you make the guest fee important and heard. It will also reinforce your conversation in the memory of the guest which will increase the odds that they will write or call back.

If you cannot find a template that fits the message you need to convey, you do not need to pick the pre-worded templates. However, it is still important to create an email with the proper Pebble Beach formatting. To ensure your formatting is consistent, you should select the template titled "**Blank Reply Template."** This template will only have the introduction and signature completed but will leave you free to write whatever you need to say.



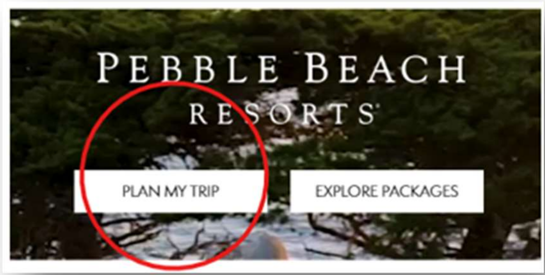
Vacation Planners

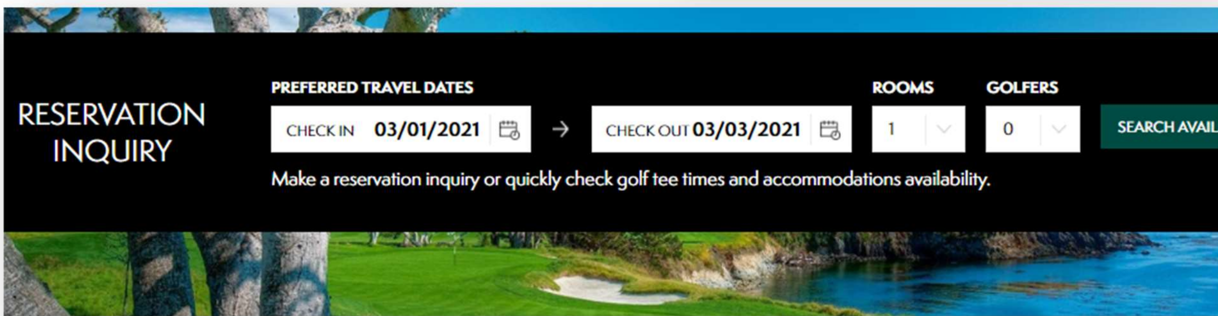
A Vacation Planner (or "VP) is a Hot Lead that is generated from the Pebble Beach website via the convenient **Plan My Trip** tool.

Many guests prefer to do their own research about our resorts by visiting www.pebblebeach.com. Since those guests will not have a Reservations Agent to walk them through their options, the **Plan My Trip** tool leads them through a series of questionnaire style prompts to help them organize their trip.

Guests will be prompted to enter:

- Dates for their trip
- Which Resort Property they want to stay in
- Which golf courses they want to play
- How many rooms they need
- How many golfers are in their party





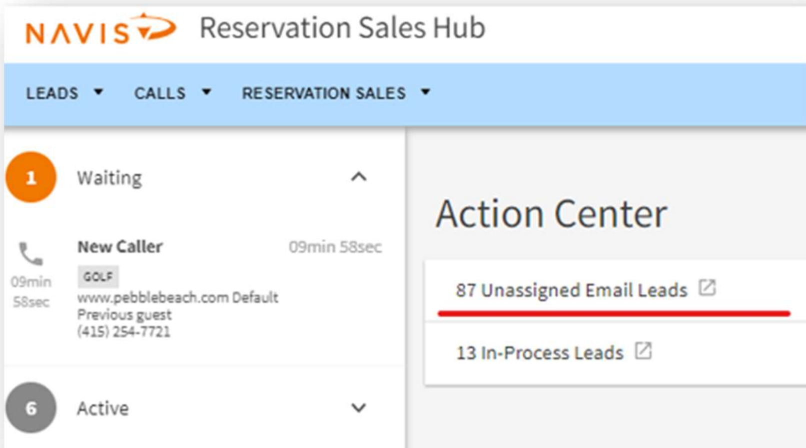
The data collected via these prompt questions, along with the guest's contact information, is synthesized into a **Vacation Planning Request** and sent to our Reservation's team.

Vacation Planning Requests are ***the hottest*** **of Hot Leads** with a significantly higher average revenue and conversion percentage rate than standard inbound calls.

A Vacation Planner Submission Indicate:

The guest is highly interested in getting more information
The guest agrees to be contacted by PBC Reservations Agent
The guest wants to know what we have to offer
The guest is willing to take steps towards booking a reservation

The Reservations Department receives Vacation Planning Requests in the form of **NAVIS Leads.**

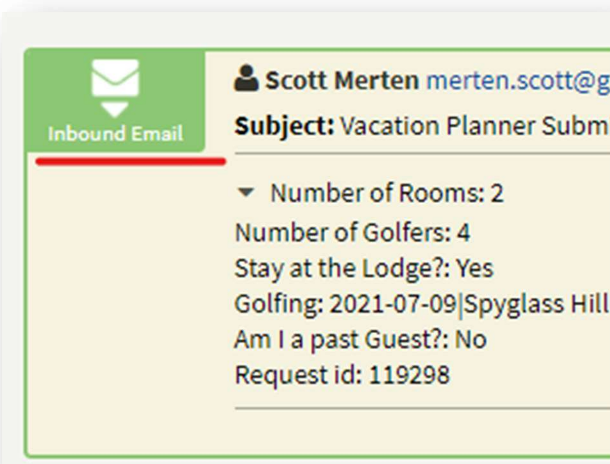


They arrive unassigned to any particular agent, so it is the job of the Supervisors and Managers to assign them to specific agents as they come in.

All unassigned Vacation Planner Leads can be seen in the **Action Center** of their NAVIS Hub under the header “**Unassigned Email Leads**.”

On the lead forms of Unassigned Email Leads, the **Originating Agent** and **Assigned Agent** fields are blank.

Once a supervisor assigns the Vacation Planner to you, the Originating Agent will be the name of that supervisor, and the Assigned Agent will be you.



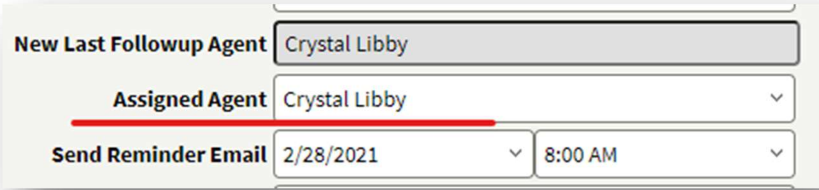
The guest’s contact information and requested dates of stay will be pre-populated into the **Data Fields** of the lead.

The guest’s answers to the Plan My Trip prompts will be synthesized in the **Notes** section at the bottom of the Lead in the form of an **Inbound Email**.

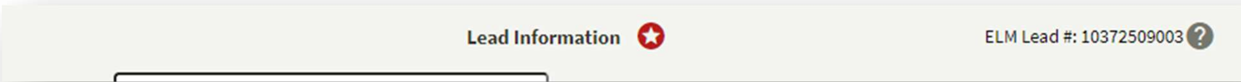
Vacation Planners in the Action Center

A Supervisor or Manager will assign a Vacation Planner to you by modifying two elements of the Lead:

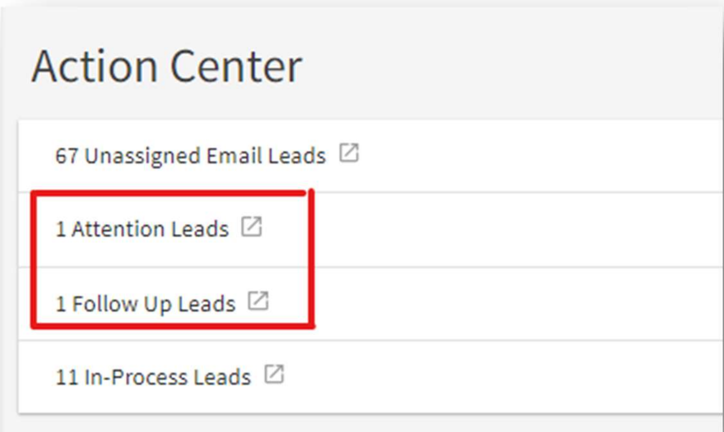
- They will set the "**Assigned Agent**" field of the lead to your name



- They will "**Star**" the lead which will mark it as an "**Attention Lead**"



The Vacation Planner will now be visible in your personal **Action Center** under both the Attention Lead section and Follow Up lead sections:



As a Reservations Agent, it is your responsibility to:

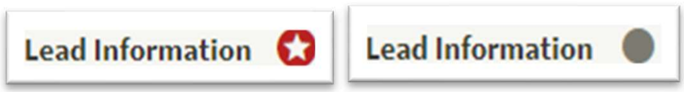
1. Thoroughly review each Vacation Planning Requests to which you are assigned
2. Reach out to the guest by both phone and email within 24 hours of the VP being assigned to you
3. Create follow up appointments with these guests to complete the sale

You will have set time each week - **Project Time** - during which you can review your Vacation Planners and complete follow up calls/emails. It is best to try to reach out during slow call volume periods as well to stay on track.

Once you have made your first contact for a Vacation Planner:

You should remove it from Attention Lead and Follow Up Lead sections of your Action Center, so it is clear that it has already been taken care of.

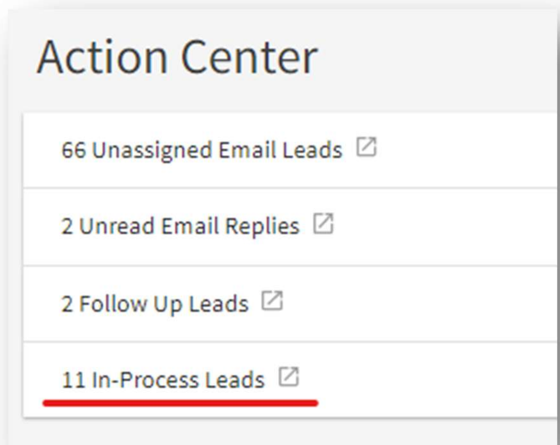
1. Un-star the lead by clicking the star so it turns back to a gray dot, then save the lead.



2. Change the lead status to either In-Process, Booked, or Not Booked depending on the outcome.

The Vacation Planners that are fully completed (**Booked** or **Not Booked**) will **disappear entirely** from your **Action Center**.

The **Hot Lead** Vacation Planners for which you intend to follow up by phone and/or email will move to the **In-Process** section of your Action Center.



By managing your Vacation Planner leads with this method, you will never miss a newly assigned Vacation Planning Request:

3. Any time you see anything in your Attention Lead or Follow Up sections of the Action Center, you will know that this is something that has not been touched yet and thus needs to be attended to immediately.
4. Conversely, anything in your In-Process section of the Action Center is a lead that is in-progress.

If you find that the leads within the n-Process section begin to accumulate to a high level, that is your queue that you need to focus on closing out those leads. You can ask your Supervisor for additional project time and/or ask that they hold of assigning you new Vacation Planner leads temporarily while you catch up.

Vacation Planner Guideline Check

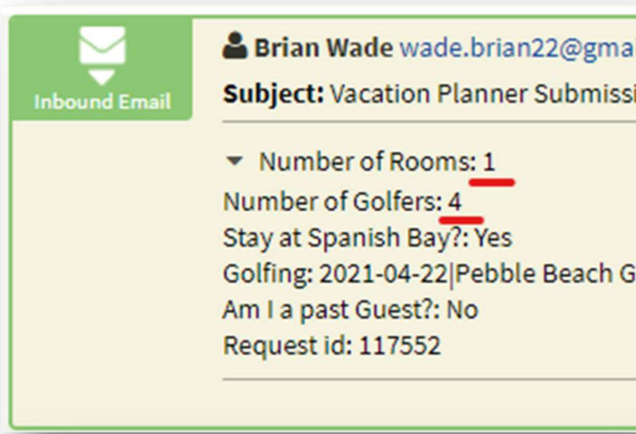
To be successful with Vacation Planners, it is important to fill in the blanks of what **the Plan My Trip** Tool cannot do.

One major feature the Plan My Trip tool does ***not*** have is the ability to do is let guests know when their trip does not meet our booking guidelines.

Example 1:

This Vacation Planner request states that the guest would like 1 room but has 4 golfers.

Before we go any further planning this trip for the guest, we need to inform them that we have a maximum of two golfers per room to book Resort Guest tee times.

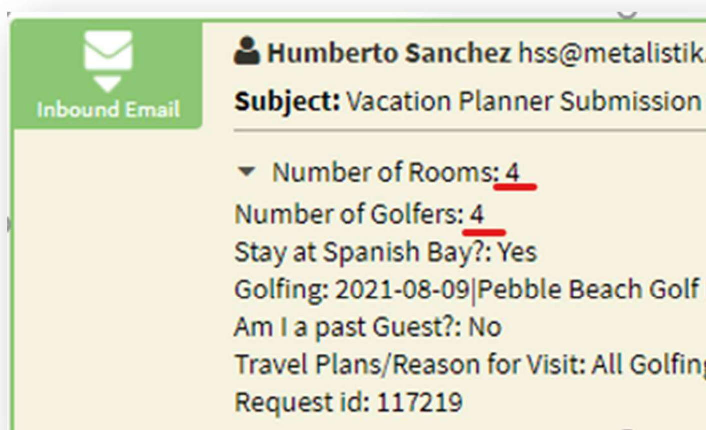


Example 2:

This Vacation Planner is stating that the guest wants 4 golfers in 4 separate rooms.

This VP does in fact meet the two-golfer maximum per room.

However, by checking the requested Itinerary Dates in the Data section of the lead, we can see that they do not meet the three-night minimum stay requirement.



Vacation Planner Contact Sequence

1. Thoroughly review the Vacation Planner Lead Form
2. Use SMS to check room and golf availability for the guest's requested dates.
3. Place an outbound phone call to the guest
4. Based on the phone call, follow the appropriate column of instructions below.

You Reach the Guest

Gather as much information as you can, pitch a personalized itinerary, and ask for the sale.

Your Call Result will be one of the following:

1. **Booked:**
   The guest booked. Fill out the lead form per our booked lead process.
2. **Not Booked:**
   The guest declined to book and does not want a follow up. Mark the lead status as Not Booked and enter the Not Booked reason code.
3. **Hot Lead:**
   The guest declined to book on the current call but agreed to a follow up. Mark your lead status as "In-Process."

Hot Lead Contact Continuance

Send a customized email with pricing, guidelines, and any information pertaining to your conversation.

Set a reminder for a date and time that is specific to your conversation to follow up and book.

Second Contact

Once you receive the email reminder, reach out to the guest.

If you do reach the guest, return to the **You Reach the Guest** instructions above.

If you do not reach the guest at your appointed time, proceed to **You Did Not Reach the Guest** instructions.

You Do Not Reach the Guest

Leave a voice message, stay brief and do not quote availability. Leave your name and use the phone number on the lead as the phone number to use when calling you back.

Send an Email:

4. Use the Vacation Planner – Initial Contact template in NAVIS.
5. The subject line should brand Pebble Beach and include the guest's name: "Pebble Beach Resorts | O'Brian Trip March 2021"
6. Personalize the template to include a succinct message about availability and address any booking guideline issues.

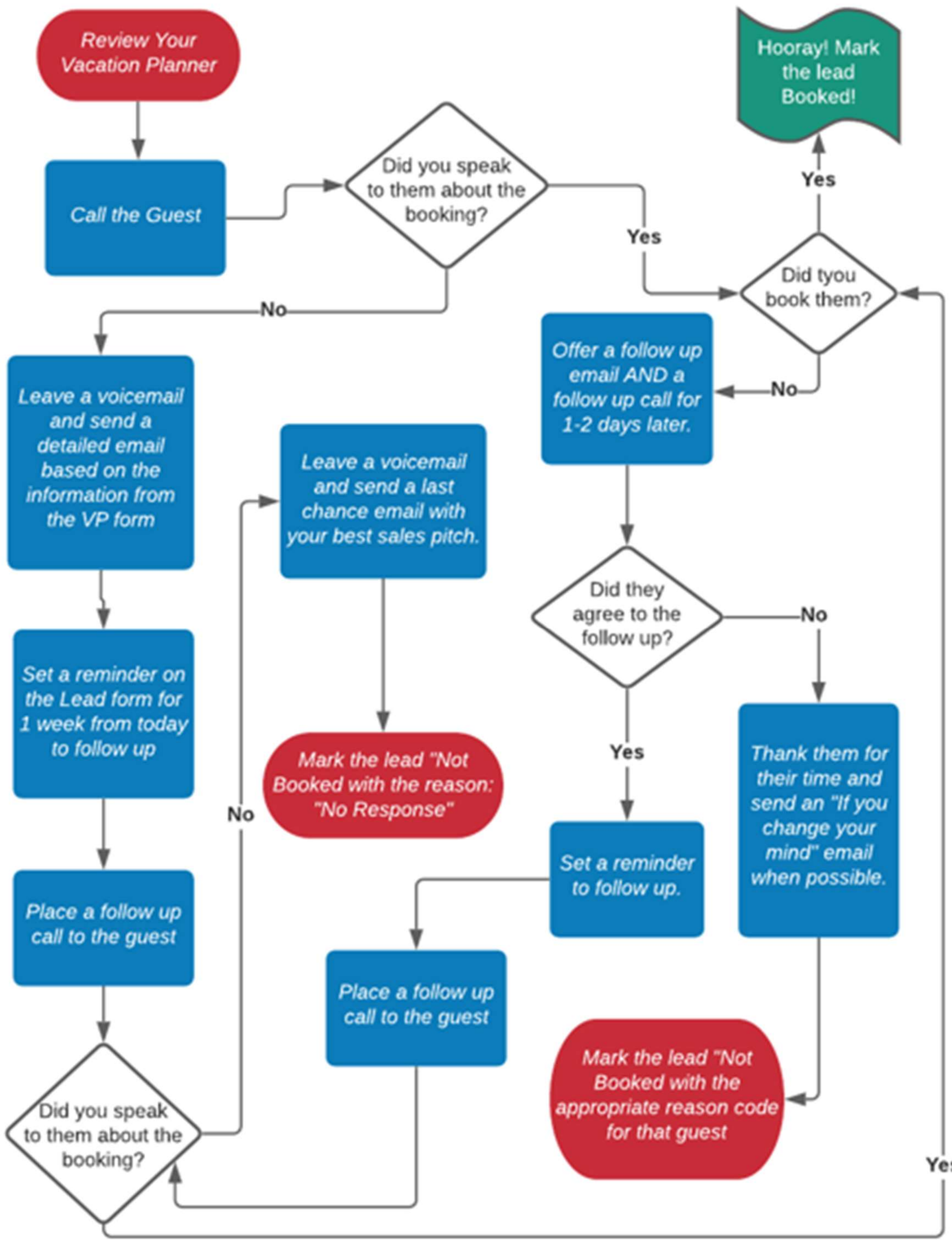
Set an email reminder on the lead form for one week from your initial contact date to follow up by both phone and email. Mark your lead status as "In-Process."

Final Contact

When you receive your follow up email reminder, review the notes to see if the guest has responded to your email or spoken with any reservations agents since your initial contact. If they have not replied, place an outbound call to the guest.

- If you do reach the guest, follow the **You Reach the Guest** instructions.
- If you do not reach the guest again, send an email using the "No Response Reply" template. Mark your lead as Not Booked with No Response.

Vacation Planner Flow Chart



Writing Effective Email Quotes

Subject: Pebble Beach Resorts | May 2021 Birthday Trip

Dear Mr./Mrs/Ms. _______

My name is ______. It was a pleasure speaking with you today. I am excited to plan your trip to Pebble Beach!

Check In: Thursday _______
Check Out: Sunday _______

Here are a few of the features of The Lodge at Pebble Beach.

- The site of our infamous Pebble Beach Golf Links
- Adjacent to our Forbes 5 Star Spa
- Nearby an array of Pebble Beach shops, restaurants, and our Visitor's Center
- Set on a gorgeous ocean cliffside of Stillwater Cove
- 10-minute drive from Carmel by the Sea

Deluxe Ocean View Room = $1500 per night
Nightly rate with tax, service fee, and assessment = $1687.43
**Panoramic view of the 18th hole of Pebble Beach and Stillwater Cove, newest building with renovated design.*

Golf Greens Fees
Pebble Beach Golf Links = $575 per player
Spyglass Hill Golf Course = $415 per player
The Links at Spanish Bay = $295 per player

Resort & Golf Booking Policy

- In order to confirm reservations, we will need a deposit equal to the first two night's room, tax, and service fee. Any additional nights or recreation are due upon departure.
- We have a 14-day cancellation policy, which means you can make any changes or cancel up until 14 days prior to your arrival date.

I will follow up with you on _____ at ____AM/PM. If you would like to get in touch before then, feel free to reply to this email or call into our Reservation Center at 1-800-654-9300 and ask for _______.

Warm Regards,

Dates of Stay
Include the day of the week with the date to avoid mistakes

Property
"Talk up" the property the guest selects by using descriptors to excite them about their trip.
Breathtaking ocean view
Legendary golf links

Rooms
Always pitch Ocean View first. If your guest showed interest in a lower tier room, include both the lower tier and Ocean View pricing in your email quote.

Golf
List rates for all courses even if the guest only mentions one or two. Do not assume that the guest will not want to add more golf to their trip.

Anticipate Questions
What will the guest need to know before booking?
Our deposit requirement?
Our cancellation policy?

Follow Up
Re-iterate that you have a follow up appointment, listing the date and time for their reference.

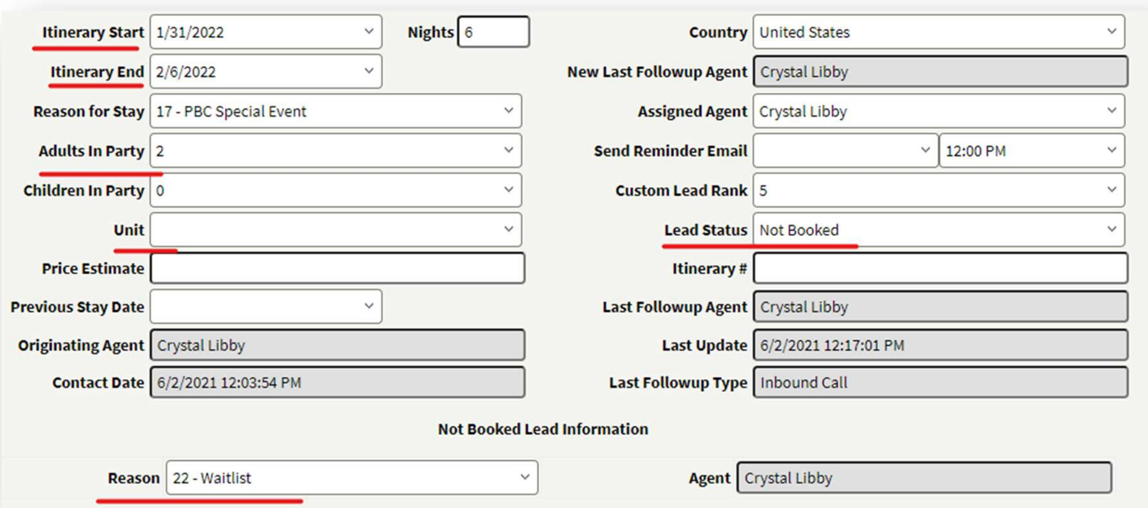
Waitlists

Pebble Beach Resorts has several **major events** throughout the year. Room stays over our major events are by invite-only and are typically designated for tournament players, sponsors, and the media.

Once we are within a month or so of each event, Pebble Beach Resorts will open remaining rooms to transient guests. Each year, we collect a **Waitlist** of guests in NAVIS for those who want to book these remaining rooms.

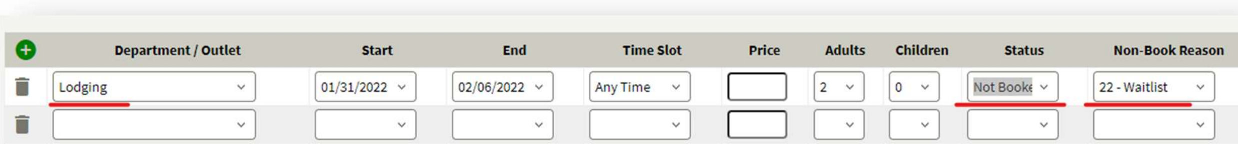
To put a guest on a **Waitlist** in NAVIS, complete the following fields on your **Lead Form**:

- Itinerary Dates
- Number of Adults
- The specific room type in the UNIT field if specified
- Change the Lead Status to Not Booked
- Set the Not Booked Reason Code to Waitlist



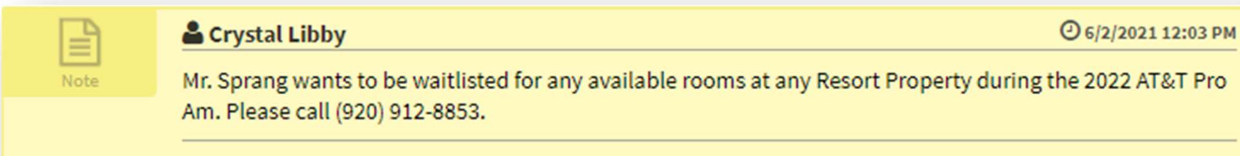
In the **Requested Itinerary Items** section:

- Select the desired property, or if not specified, select "Lodging" which will waitlist the guest for all three Resort Properties.
- Set the Status to Not Booked and the Reason Code to Waitlist



In the **Extra Fields**, section, specify the **Special Event** during which the guest wishes to book their room(s).

Leave a **Note** that specifies exactly what the guest *wishes to book and the best method to contact* the guest.



NAVIS Reports

Managers and Supervisors are responsible for pulling reports on a regular basis, however, there are also several reports that you as a Reservations Agent can view to evaluate your own progress.

There are many reports available through NAVIS to evaluate metrics such as:

- Sales Productivity
- Lead and Call Result accuracy
- Agent performance
- Agent time management
- Marketing Campaign effectiveness

By regularly checking the reports covered in this section, you will better understand what you are doing well and what areas you can stand to improve upon.

It is also valuable to see where your statistics compare to your peers and communicate with each other to learn and improve as a team.

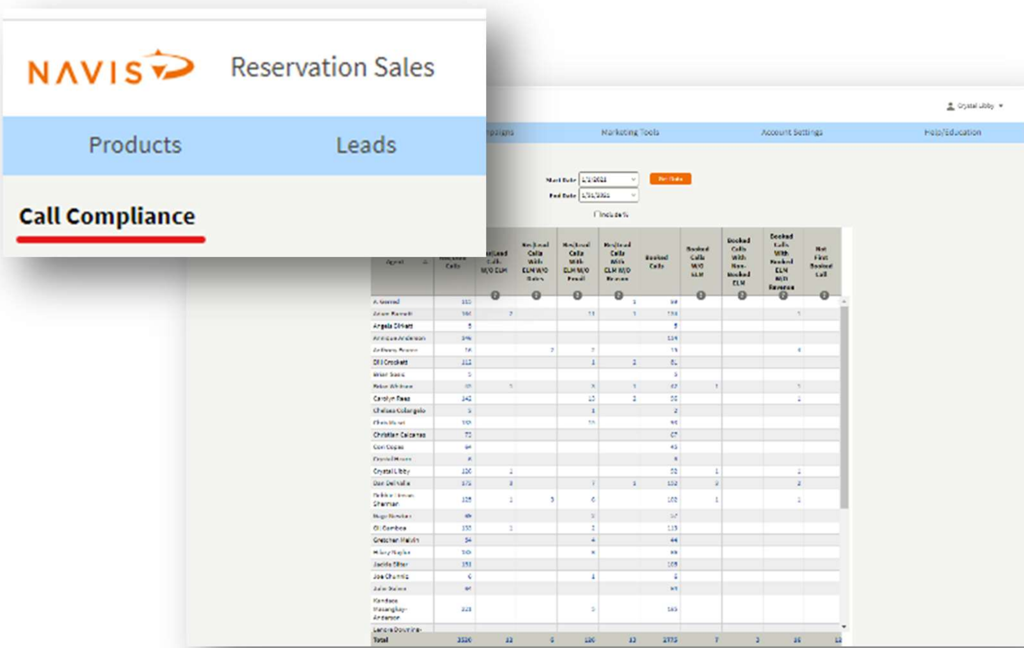
Call Compliance Report

Compliance is the gathering of complete data.

It is the responsibility of every Reservations Agent to insure that NAVIS is properly recording data and metrics correctly. If you are missing key pieces of data on a Lead Form, that lead is "out of compliance."

The **Call Compliance Report** feature of NAVIS helps us to manage common issues that arise with our Leads that potentially skew sales and marketing metrics.

This report checks for discrepancies between Reservation Center phone calls and Lead Forms.
By regularly reviewing the Call Compliance Report, we can ensure that key data points on our Lead Forms are complete and match appropriately with our Call Dispositions so we can provide clean data to our **Marketing** and **Revenue Management** teams.



As a Reservations Agent, it is your responsibility to regularly view your **Call Compliance Report** and immediately address any and all issues with your Leads.

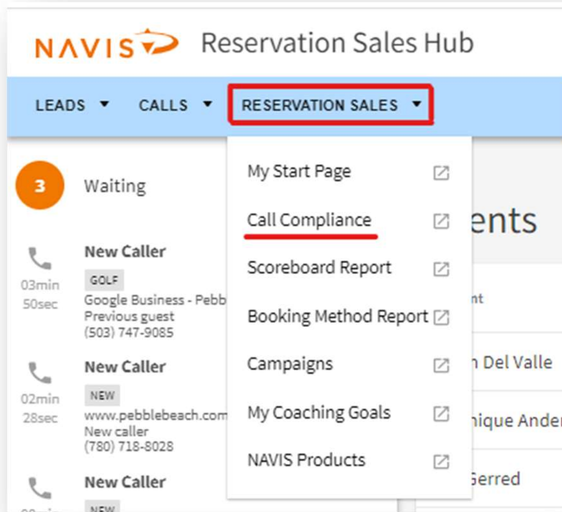
New Agents should be checking their Call Compliance daily. As you gain experience, you can reduce this frequency to 1-2 times per week during your **Project Time**.

How to Locate Your Call Compliance

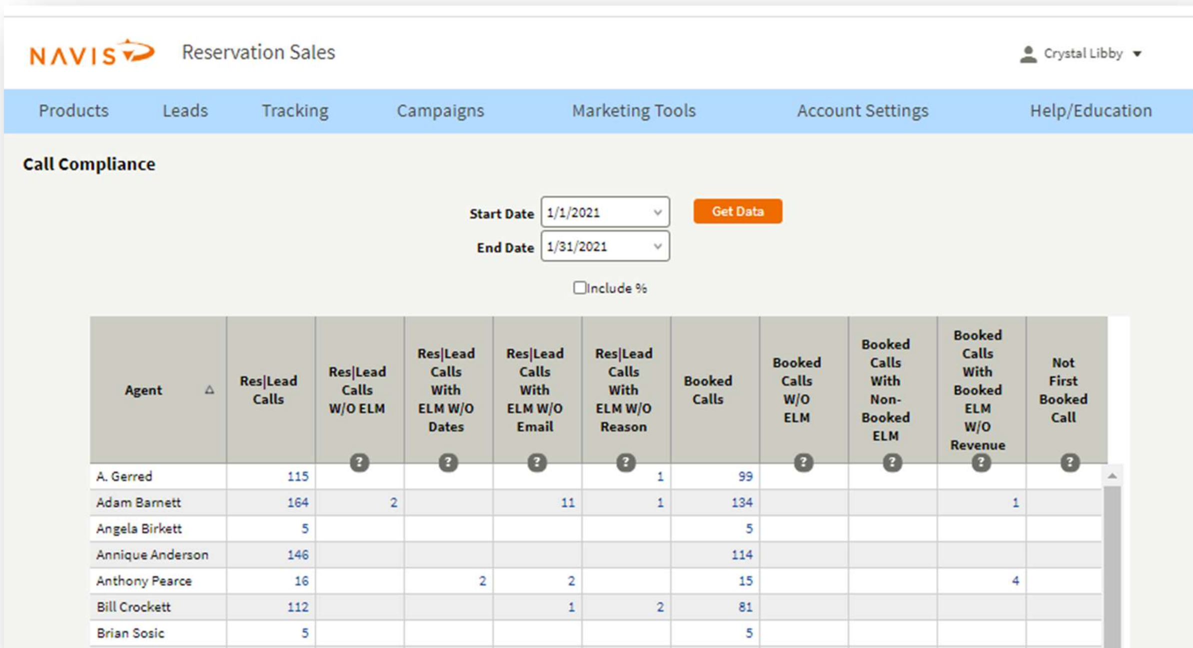
Begin in The Hub of NAVIS.

The Toolbar in the top left corner has three dropdown menus. Select the menu titled "Reservation Sales"

From that menu, click **Call Compliance**.



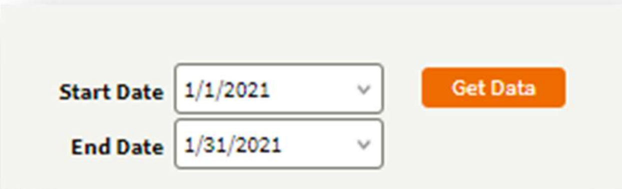
This will open the **Call Compliance** page of NAVIS.

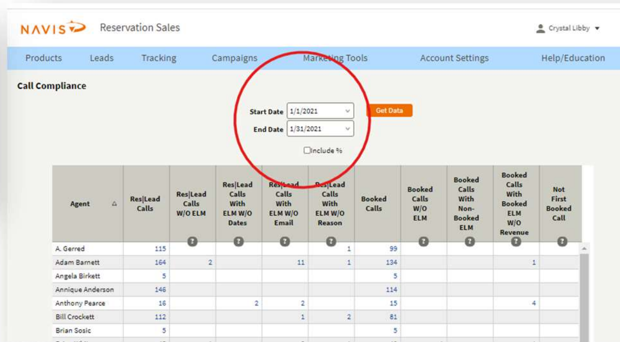


Agent	Res|Lead Calls	Res|Lead Calls W/O ELM	Res|Lead Calls With ELM W/O Dates	Res|Lead Calls With ELM W/O Email	Res|Lead Calls With ELM W/O Reason	Booked Calls	Booked Calls W/O ELM	Booked Calls With Non-Booked ELM	Booked Calls With Booked ELM W/O Revenue	Not First Booked Call
A. Gerred	115				1	99				
Adam Barnett	164	2		11	1	134			1	
Angela Birkett	5					5				
Annique Anderson	146					114				
Anthony Pearce	16		2	2		15			4	
Bill Crockett	112			1	2	81				
Brian Sosic	5					5				

To search the most relevant data, use the Date dropdowns to set the timeframe you wish to search:

- The Start Date should always be set to the 1st of the current month
- The End Date should be set for the current date.





Once your dates are set, click "Get Data" *to refresh the chart.*

- **All agents** who have worked in the current month will be listed in the far-left column in alphabetical order
- The second header is the **number of Leads** that each agent has created within the dates you set
- The seventh header lists the number of **booked calls** by each agent within the dates you set
- The headers of the remaining columns are the **categories of compliance** that we need to maintain.

Agent	Res|Lead Calls	Res|Lead Calls W/O ELM	Res|Lead Calls With ELM W/O Dates	Res|Lead Calls With ELM W/O Email	Res|Lead Calls With ELM W/O Reason	Booked Calls	Booked Calls W/O ELM	Booked Calls With Non-Booked ELM	Booked Calls With Booked ELM W/O Revenue	Not First Booked Call
A. Gerred	115				1	99				
Adam Barnett	164	2		11	1	134			1	
Angela Birkett	5					5				
Annique Anderson	146					114				
Anthony Pearce	16		2	2		15			4	
Bill Crockett	112			1	2	81				
Brian Sosic	5					5				

We will take a *deeper dive into the meaning of each of these category headers in the "How to Correct* Your Call Compliance" section of this manual.

As you may have noticed, the full compliance report is a combination of two compliance charts:

The 1st is Call Compliance for all **Lead Calls**

Res|Lead Calls	Res|Lead Calls W/O ELM	Res|Lead Calls With ELM W/O Dates	Res|Lead Calls With ELM W/O Email	Res|Lead Calls With ELM W/O Reason
115				1
164	2		11	1
5				
146				
16		2	2	
112			1	2
5				

The 2nd is Call Compliance for all **Booked Calls**

Booked Calls	Booked Calls W/O ELM	Booked Calls With Non-Booked ELM	Booked Calls With Booked ELM W/O Revenue	Not First Booked Call
99				
134			1	
5				
114				
15			4	
81				
5				

Lead calls refer to any call during which you created and saved a lead, i.e. Booked, Not Booked, or Hot Leads.

Because **Booked Calls** also require Lead forms, you may see the same out of compliance leads appearing under categories in both the first and second set of blue boxes.

Perfect Compliance

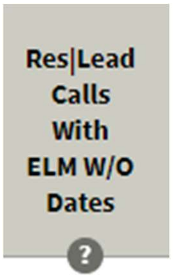
If you compliance is perfect – which is our goal - every box under the **categories of compliance** will be blank, meaning that you do not have any leads with that particular error.

An example of perfect compliance has been highlighted in the image below for Reservation Agent Annique Anderson. Annique has:

1. Created 146 Leads
2. Booked 114 calls
3. Zero Leads "out of compliance"

Agent	Res|Lead Calls	Res|Lead Calls W/O ELM	Res|Lead Calls With ELM W/O Dates	Res|Lead Calls With ELM W/O Email	Res|Lead Calls With ELM W/O Reason	Booked Calls	Booked Calls W/O ELM	Booked Calls With Non-Booked ELM	Booked Calls With Booked ELM W/O Revenue	Not First Booked Call
A. Gerred	115				1	99				
Adam Barnett	164	2		11	1	134			1	
Angela Birkett	5					5				
Annique Anderson	146					114				
Anthony Pearce	16		2	2		15			4	
Bill Crockett	112			1	2	81				
Brian Sosic	5					5				

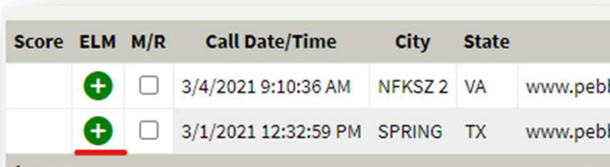
How to Correct Your Call Compliance



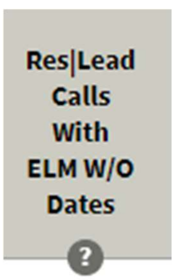
Issue: A call has been saved with a Disposition Code that requires a Lead Form to be created, but there is no Lead attached to the call.

Fix: Click on the number in that column to open the list of leads with this issue.

To create and attach an ELM (Lead) to these calls, click the **green plus sign** to the left of each call in the list. This will open a new lead with the information for that caller pre-populated into the Data Fields.

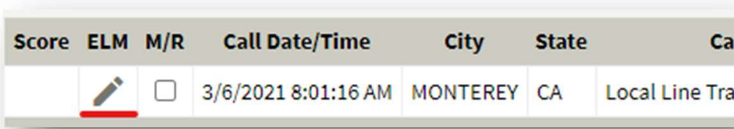


You will need to add your notes and appropriately set the lead status (adding the Itinerary number if it is a booked call), then save the lead.



Issue: A Lead has been saved, but the date fields have not been filled out

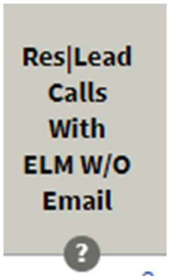
Fix: Click on the number in that column to open the list of leads with this issue. To the Lead Forms in a new tab, click the pencil icon to the left of each lead.



For a booked call, make sure your Itinerary number is correct, the “DNA” box next to the email address field is checked, and the reservation is confirmed. This will allow NAVIS to correctly pull all information from SMS.

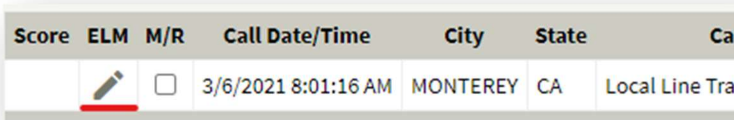
For an In-Process or Not Booked call, open the Lead and fill out the dates that the guest inquired about. If you did not get specific dates, select a date range close to the timeframe you discussed.

If you see a lead with this compliance issue, but when you open the lead, you see that the dates are filled, check the number of nights box. If this box is not 1 night or more, you will be out of compliance despite a date being present in the start and end fields.



Issue: A Lead has been saved, but the Email field is blank

Fix: Click on the number in that column to open the list of leads with this issue. To the Lead Forms in a new tab, click the pencil icon to the left of each lead.



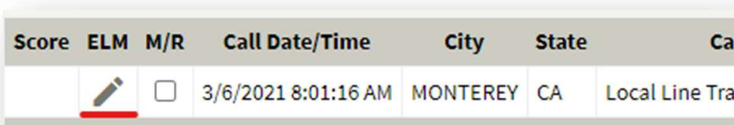
Score	ELM	M/R	Call Date/Time	City	State	Ca
		☐	3/6/2021 8:01:16 AM	MONTEREY	CA	Local Line Tra

For a booked call, make sure your Itinerary number is correct, the “DNA” box next to the email address field is checked, and the reservation is confirmed. This will allow NAVIS to correctly pull all information from SMS.

If a guest genuinely did not want to provide an email address, the “RTG” box should be checked, which will prevent the lead from showing up under this compliance category.

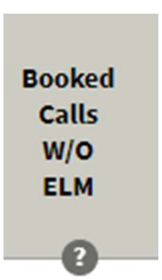
Issue: A Lead has been saved, but the reason dropdown has not been selected

Fix: Click on the number in that column to open the list of leads with this issue. To the Lead Forms in a new tab, click the pencil icon to the left of each lead.



Score	ELM	M/R	Call Date/Time	City	State	Ca
		☐	3/6/2021 8:01:16 AM	MONTEREY	CA	Local Line Tra

Review the notes of the call and/or listen to your call recording to determine what the Reason Code should be, set the code appropriately, then save the Lead.



**Any call in this category will also appear under the “Res/Lead Calls W/O ELM” category. Once you fix the lead per those instructions located above, that call will disappear from both Call Compliance columns.*

Booked Calls With Non-Booked ELM

Issue: A call disposition has been saved as "Booked," but the Lead's "Status" field has been set as "Not Booked"

Fix: Click on the number in that column to open the list of leads with this issue. To the Lead Forms in a new tab, click the pencil icon to the left of each lead.

Score	ELM	M/R	Call Date/Time	City	State	Ca
			3/6/2021 8:01:16 AM	MONTEREY	CA	Local Line Tra

Review the Lead to determine if this is a booked call. If it is, set the lead status as "Booked" and save.

If you did not book the call, you will need to reach out to a Supervisor and ask them to change your Disposition Code to either "Change/Revise" or "Reconfirm." You can do so by sending an email to your supervisor providing them with the Lead number.

Subject: Call Result Update

Hello Brian,

Can you please change my call results on these two leads to "Change/Revise" instead of "Booked" so I get be in compliance?

Lead # 10354732003
Lead # 10380848003

Thank you!

Booked Calls With Booked ELM W/O Revenue

Issue: A Lead has been marked "Booked," but no revenue has been pulled from SMS

Fix: Click on the number in that column to open the list of leads with this issue. To the Lead Forms in a new tab, click the pencil icon to the left of each lead.

Score	ELM	M/R	Call Date/Time	City	State	Ca
			3/6/2021 8:01:16 AM	MONTEREY	CA	Local Line Tra

For a booked call, make sure your Itinerary number is correct, the "DNA" box next to the email address field is checked, and the reservation is confirmed. This will allow NAVIS to correctly pull all information from SMS.

If you see many calls in this category for all agents, it is likely that NAVIS is not syncing with SMS for everyone. Report this issue to a supervisor or manager

Not First Booked Call

Issue: You saved a call with a "Booked" Call Disposition, but another agent already marked a call from that same Lead as "Booked" before you. Two agents cannot both claim to have booked the same lead.

Fix: Click on the number in that column to open the list of leads with this issue. To the Lead Forms in a new tab, click the pencil icon to the left of each lead.

Score	ELM	M/R	Call Date/Time	City	State	Ca
	✎	☐	3/6/2021 8:01:16 AM	MONTEREY	CA	Local Line Tra

Review the Lead to determine which agent actually booked the call. If you chose the "Booked" disposition by mistake, you will need to reach out to a Supervisor and ask them to change your Disposition Code to either "Change/Revise" or "Reconfirm."

Subject: Call Result Update

Hello Brian,

Can you please change my call results on these two leads to "Change/Revise" instead of "Booked" so I get be in compliance?

Lead # 10354732003
Lead # 10380848003

Thank you!

Inbound Call Conversion Report

Call Conversion is a statistic that measures how many calls are booked divided by how many calls are taken by a particular agent.

In other words, *what percentage of your calls result in revenue?*

A **low percentage** means that the agent is not closing as many sales per number of calls.

A **high percentage** means the agent is closing more sales per number of calls.

Each month, your assigned Supervisor will pull a report called the **Agent Ranking Report**. This report includes several statistics about each Reservations Agent. That information is compared between everyone on the team to determine each agent's "rank," the highest rank being 1.

Inbound Call Conversion is one of the statistics on this report, but it is even more specific than booked calls divided by total calls. The equation below demonstrates how this particular Call Conversation is calculated.

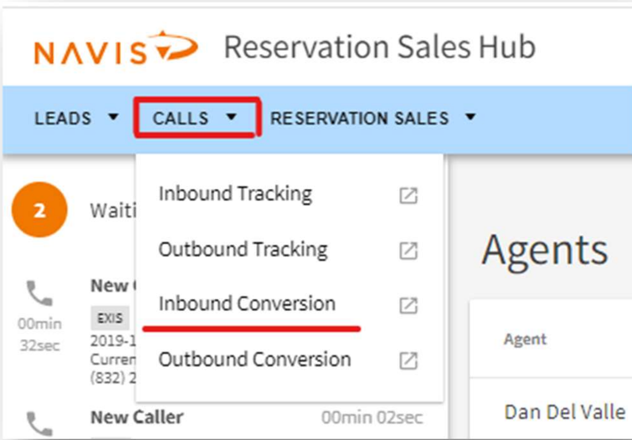
Inbound Call Conversion Equation:

$$\frac{\textbf{Inbound Calls from the NEW call skill that are Booked}}{\textbf{Total number of Inbound Calls from the NEW call skill}}$$

It is not expected that each Reservations Agent will close a booking on every single call. (The average Inbound Call Conversion Rate in February of 2021 was 31.2%). However, you can greatly influence the number of callers who book with you by utilizing sales techniques.

Your team supervisor will review several metrics with you on a monthly basis from the Agent Ranking Report. If you are struggling to reach your Inbound Call Conversion percentage goal, your supervisor will be happy to provide you with additional sales coaching.

How to Locate Your Inbound Call Conversion Rate



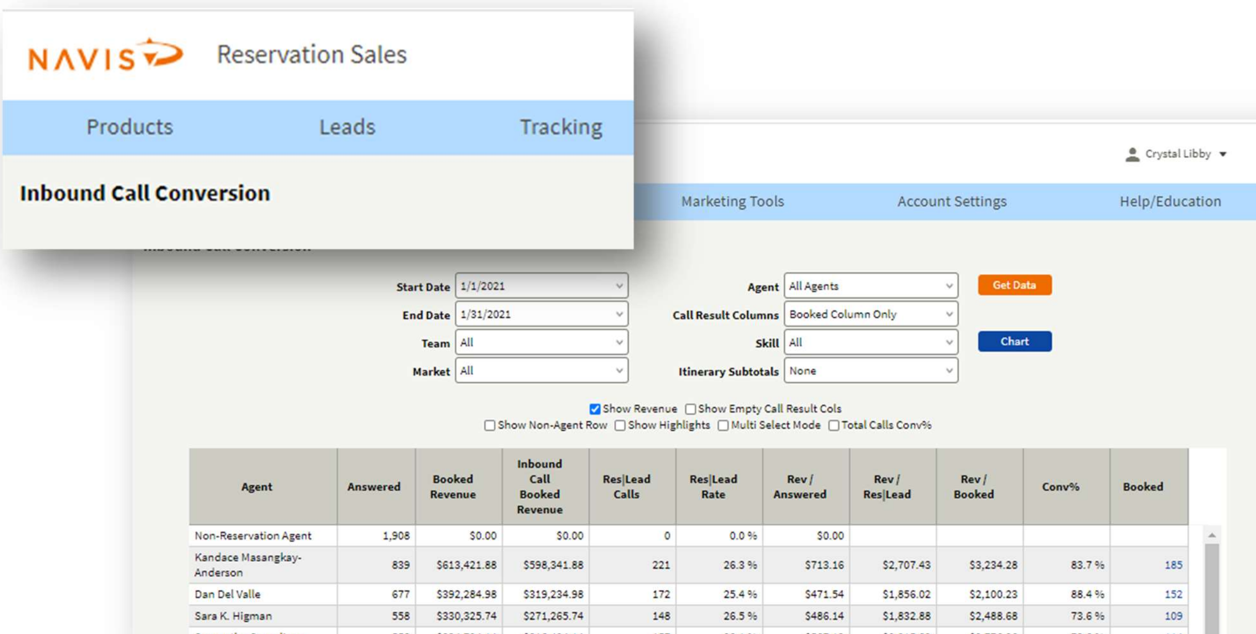
Begin in The Hub of NAVIS.

The Toolbar in the top left corner has three dropdown menus.

Select the menu titled “Calls”

Then select “**Inbound Conversion**”

This will open the **Inbound Call Conversion** page:



Inbound Call Conversion Report Categories and Definitions

For each Reservations Agent, the following categories are evaluated to determine the overall Call Conversion Rate:

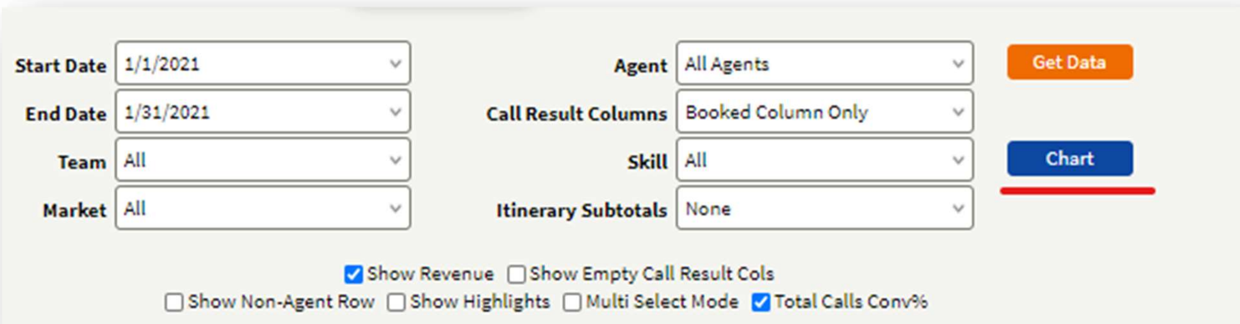
Answered	Booked Revenue	Inbound Call Booked Revenue	Res|Lead Calls	Res|Lead Rate	Rev / Answered	Rev / Res|Lead	Rev / Booked	Conv%	Booked
1,908	$0.00	$0.00	0	0.0 %	$0.00				
839	$613,421.88	$598,341.88	221	26.3 %	$713.16	$2,707.43	$3,234.28	83.7 %	185
677	$392,284.98	$319,234.98	172	25.4 %	$471.54	$1,856.02	$2,100.23	88.4 %	152
558	$330,325.74	$271,265.74	148	26.5 %	$486.14	$1,832.88	$2,488.68	73.6 %	109

Answered	Total number of outbound calls placed by the agents selected
Booked Revenue	Total amount of booked revenue for all booked leads. Revenue is recorded for the agent that booked the lead and displays leads by contact date
Inbound Call Booked Revenue	Total amount of revenue booked by inbound call booking method only - revenue is recorded for the agent that booked the lead and displays leads by contact date
Res/Lead Calls	Total number of outbound lead calls (usually Booked, Hot Lead, and Not Booked)
Res/Lead Rate	Percentage of total answered calls that were lead calls
Rev/Answered	Total amount of inbound call booked revenue divided by the total number of calls answered
Rev/Res|Lead	Total amount of inbound call booked revenue divided by the total number of calls for which the agent created a lead
Rev/Booked	Total amount of inbound call booked revenue divided by the total number of booked calls
Conv%	Percentage of lead calls that were booked
Booked	Total number of inbound booked call results.

Inbound Call Conversion Chart

The Inbound Call Conversion Report has an option to see the data as a bar chart. This bar chart is a terrific way to view a quick comparison between agents on any particular Supervisor Team.

To view a chart of your team, click the "Chart" button on the Inbound Call Conversion page:



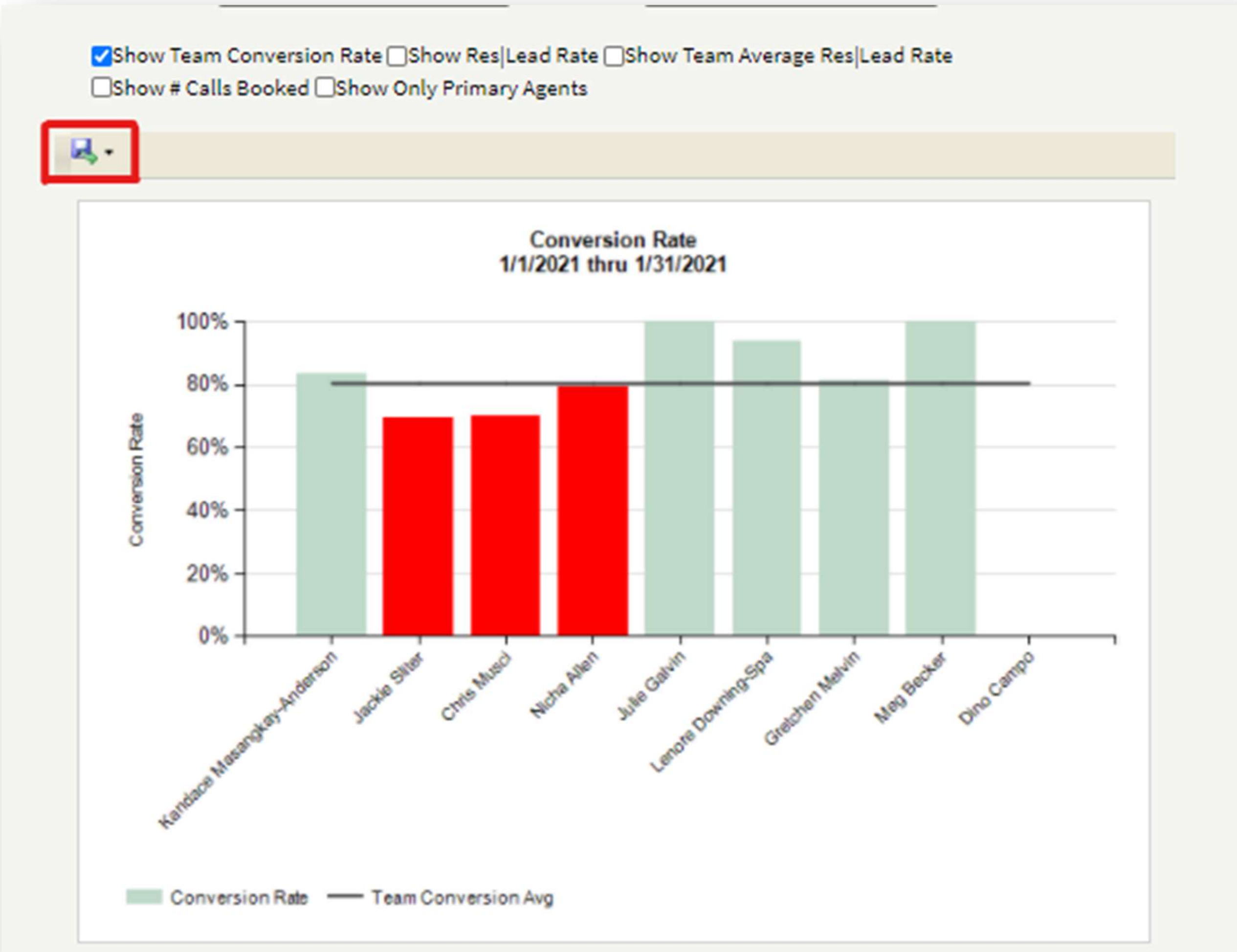
This will open a new page with a new set of dropdowns to select.

- The Start should be the first of the current month
- The End Date should be the current date
- The Market should be "Reservations" to eliminate agents who are only taking Golf, Dining, Spa, etc.
- The Team Field should be your team's NAVIS code
- Check the box that says "Show Team Conversion Rate"

Click "Get Data" once all fields are complete.

A bar chart will now generate on the same page.

To view the bar chart on a larger scale or export it into a specific format, click the "Save To" icon indicated with a red square in the image below.



As you can see in the above chart:

- The black line across the chart identifies the average conversation percentage for the team.
- Any agent who is meeting or above the team average is displayed with a **green bar**.
- Any agents currently below the team's average is displayed with a **red bar**.

Keep in mind that, even though three agents on this chart are currently below the team's average, all three are still meeting the minimum Conversion Rate of 65%.

It is fantastic that so many agents on this team are exceeding this threshold. After all, *65% is the floor, not the ceiling.*

Inbound Call Statistic Comparison

When you initially open the inbound call conversion page, the statistics are listed for each agent with their names in alphabetical order.

The reason for this is the small triangle you see next to the word Agent:

Agent △	Answered	Booked Revenue	Inbound Call Booked Revenue	Res|Lead Calls	Res R
A. Gerred	20	$11,807.88	$10,662.88	6	
Adam Barnett	37	$17,356.16	$13,814.20	16	
Alicia Pruett	17	$0.00	$0.00	0	
Angela Birkett	0	$51,991.00	$0.00	0	
Annique Anderson	26	$42,052.62	$29,692.62	9	
Bill Crockett	12	$14,680.00	$10,660.00	7	
Brian Whitson	7	$150.00	$150.00	1	

You can click on any column header to move this triangle, and NAVIS will reorganize the list based on that contents of that column.

For example:

if you wish to re-order the list to see who has booked the most revenue, simply click on the "**Booked Revenue**" header.

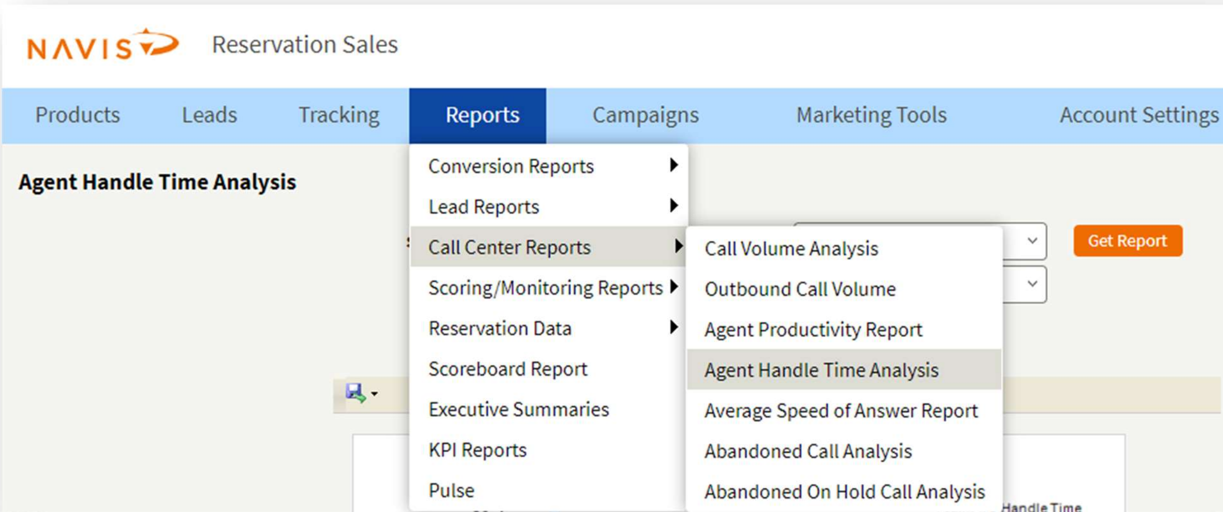
The list will now be re-ordered with the agent who booked the most revenue at the top, down to the least revenue booked at the bottom.

Agent	Answered	Booked Revenue ▽	Inbound Call Booked Revenue	Res|Lead Calls	Res| Ra
Crystal Libby	8	$57,280.00	$57,280.00	4	
Carolyn Rees	27	$55,366.30	$31,226.30	9	
Angela Birkett	0	$51,991.00	$0.00	0	
Annique Anderson	26	$42,052.62	$29,692.62	9	
Samantha Cornelison	31	$36,040.00	$16,916.14	12	
Gil Gamboa	17	$23,582.16	$20,150.00	3	
Rik Olsen	12	$22,170.00	$22,170.00	6	

You can do this with any category to see how your statistics stand in comparison with your peers.

Agent Handle Time Analysis

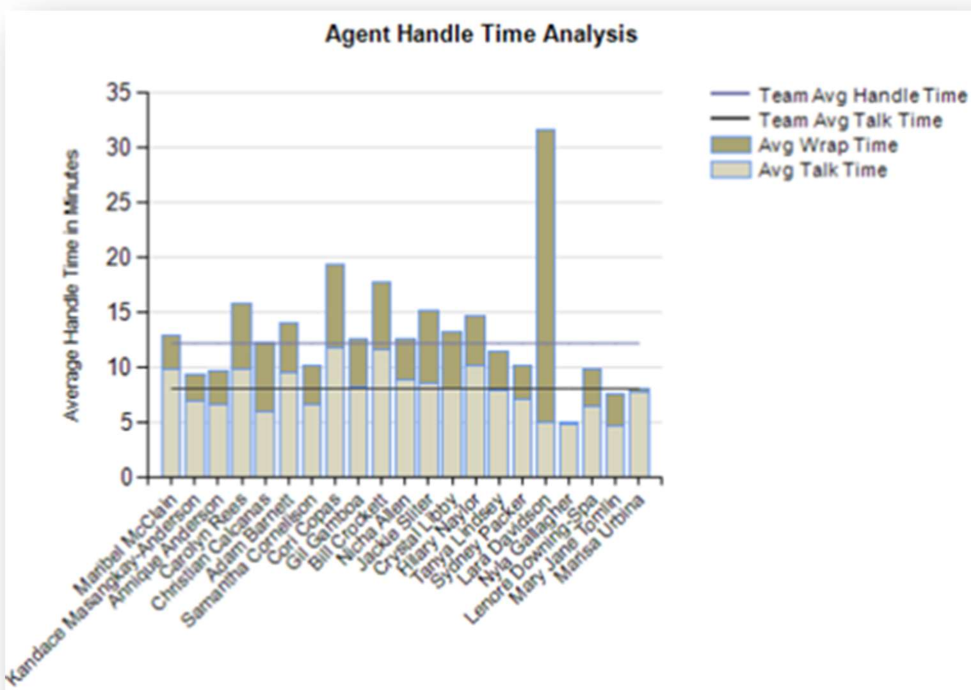
The **Agent Handle Time Analysis Report** reflects the average time each agent spends on the phone with a guest, in wrap up after their call, and their combined overall handle time.
This report is only accessible with Administrator Access.



This information can help you identify opportunities for improvement by illustrating how your time management stacks up with the rest of your team.

If your talk time is higher than the team, that may mean that you can cut down on chit chat with guests and close calls more quickly.

If you Wrap time is higher than other guests, you made need coaching with SMS and NAVIS in order to complete your bookings more efficiently.



Recorded Calls

Quality Assurance

As explained earlier in this manual, when guests call into Pebble Beach Resorts, the automated phone system issues a disclaimer at the beginning of their call to inform guests of the following:

This call may be recorded for quality assurance.

"**Quality Assurance**" refers to several things:

- Recorded calls can be used as examples to train new agents
- Managers and Supervisors review calls to provide Call Scoring as a method of performance improvement
- When issues arise with a guest's reservation, supervisors and managers can listen to calls to determine if a guest has been misquoted.

As a Reservations Agent	You do not have access to listen to the calls of your fellow agents – that is left to supervisors and managers – however, you have full access to listen to your own calls.
As a New Agent	It is important to review your own calls each day to make sure you did not miss anything while caught up in conversation with our guests.
As an Experienced Agent	Listening to your own calls is a terrific way to develop your sales techniques. *Did I offer everything I could on this call?* *Did I promote rooms and recreation from top to bottom?* *Did I provide personal suggestions for enhancing the guest's stay?*

Self-Evaluation

When evaluating one of your own recorded calls, a useful method is **Keep, Stop, Start**:

KEEP – Identify a behavior or practice that you are applying correctly

STOP – Identify a behavior that has impeded your goal as an agent to maximize revenue

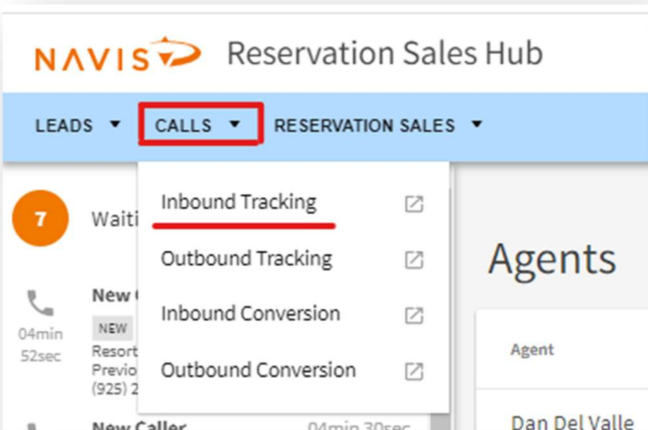
START – Identify a desired behavior that you can apply to this same type of call in the future

Listen to Your Recorded Calls

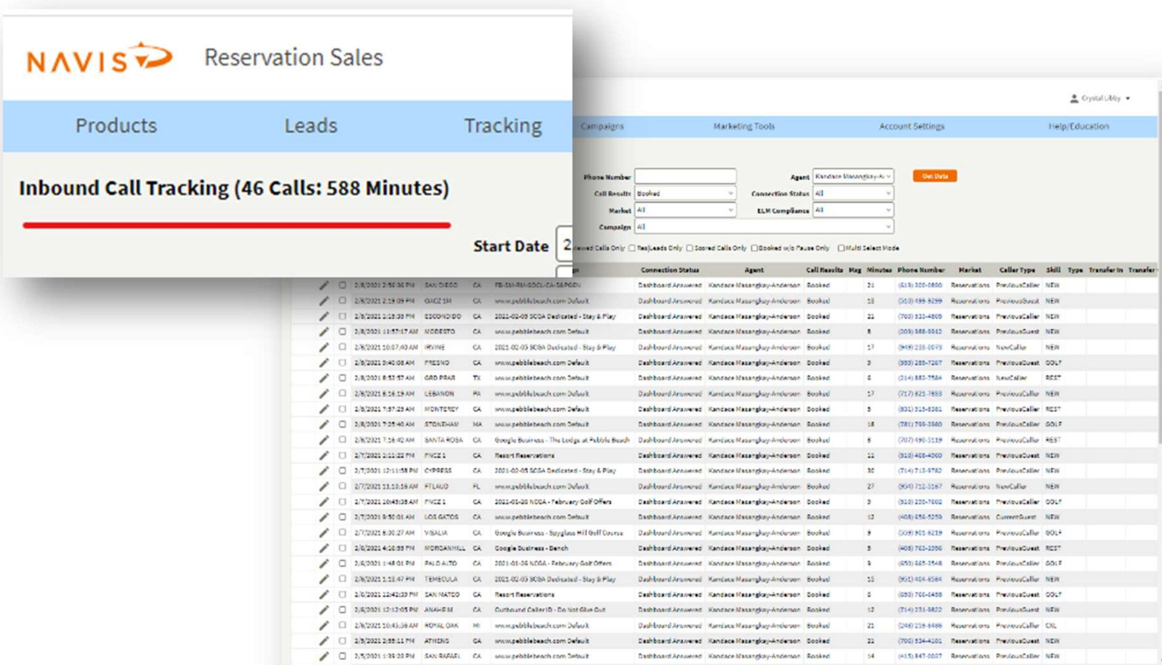
Begin in The Hub of NAVIS.

The Toolbar in the top left corner has three dropdown menus. Select the menu titled "Calls"

From that menu, click "**Inbound Tracking**"

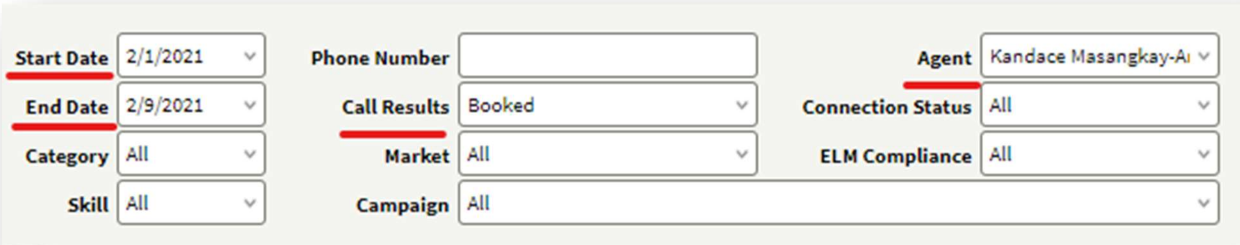


This will open the **Inbound Call Tracking** page:



The most common fields you will be manipulating to narrow down your calls will be:

- Start and End Date
- Agent
- Call Results

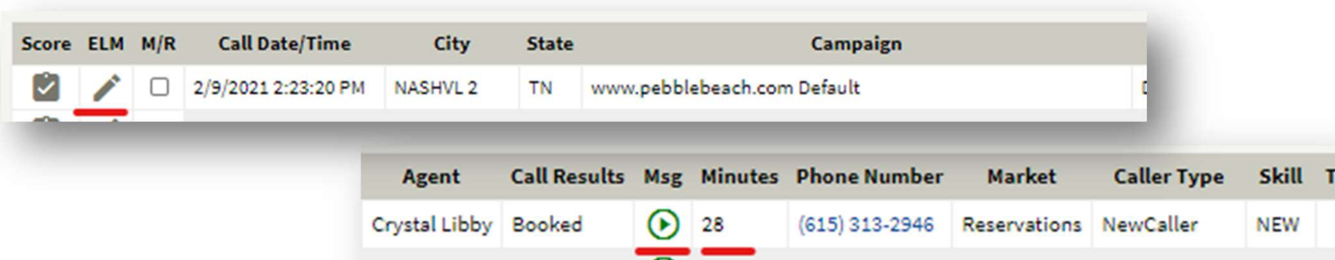


A supervisor may listen to calls with many different call results for every agent on their team.

However, for the purpose of reviewing your own calls for self-improvement, the best types of calls to listen to will be:

- Booked – Listen for any missed opportunities to maximize revenue
- Not Booked – Listen for any missed opportunities to expand the conversation or close the deal

Key Call Tracking Fields



ELM — Click this pencil to open the lead to this call in a new tab of your browser

Green Arrow — This is the play button to play the recording of your call

Minutes — While listening to your call, analyze your time management
Could have expanded the conversation to maximize your booking?
Could have cut down on chit chat to close your sale in a shorter amount of time.

Find Agent Phone Numbers

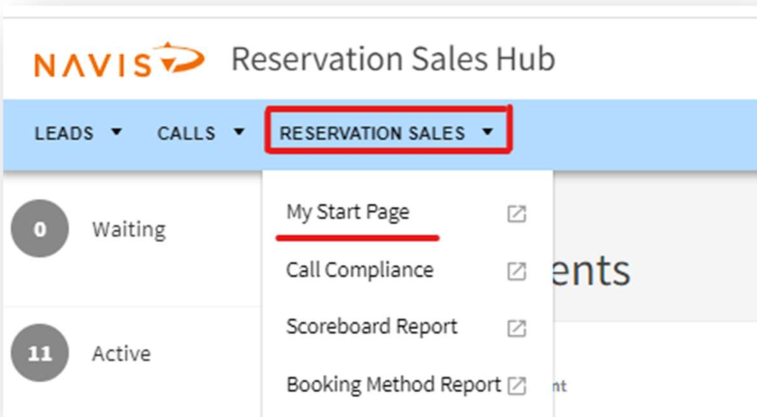
In order to dial a fellow Reservations Agent directly, you will need to know their extension.

This information is available through the PBC Telephone Book in Outlook, but it is *also* available in NAVIS.

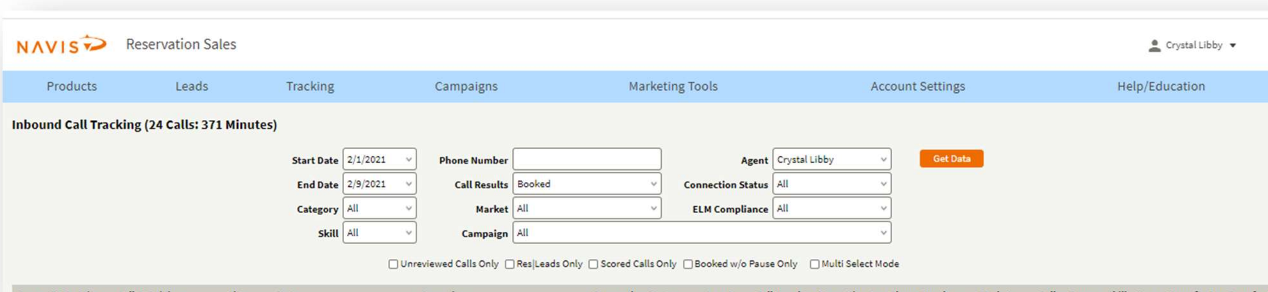
Begin on The Hub of NAVIS

From the toolbar in the top left corner, click "Reservation Sales"

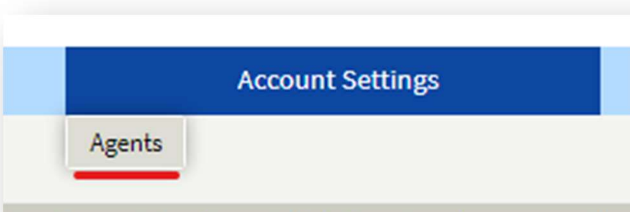
From the dropdown menu, click "My Start Page"



This will open the a new window in your browser. *The toolbar at the* top of this page has several headings.



Select "Account Settings," then "Agents"



This will open the “**Agents**” page.

The phone number of every Reservations Team member is listed. Their extension is the last 4 digits in the “Phone Number” column.

NAVIS Reservation Sales

Products Leads Tracking Campaigns Marketing Tools

Agents

Agent I.D.	Agent Name	Phone Number	Extension	User Level	Email Address	In Rotatio
1004	Rik Olsen	8316475583		Agent	olsenr@pebblebeach.com	True
1005	Nick Miguel	8316492721		Agent	migueln@pebblebeach.com	True
1010	Maribel McClain	8316447982		Agent	mcclainm@pebblebeach.com	True
1011	Kandace Masangkay-Anderson	8316487873		Agent	masangkk@pebblebeach.com	True
1020	Angela Birkett	8316492783		Supervisor	birketta@pebblebeach.com	False
1021	Brian Sosic	8316475582		Supervisor	sosicb@pebblebeach.com	False
1022	Dana Resurreccion	8316477415		Supervisor	resurred@pebblebeach.com	True
1024	Dino Campo	8316492728		Agent	campod@pebblebeach.com	False
1028	Sarah Blevins	8316487892		Administrator	blevinss@pebblebeach.com	False
1029	Suzanne Kent	8316492733		Administrator	kentsu@pebblebeach.com	False
1031	Rolando Hurtado	8316487887		Supervisor	hurtador@pebblebeach.com	False
1034	Joe Chunnic	8316487830		Administrator	chunnicj@pebblebeach.com	False
1043	Marc Nicholson	8316487872		Supervisor	nicholsm@pebblebeach.com	True
1047	Anthony Pearce	8316475596		Administrator	pearcea@pebblebeach.com	False
1060	Annique Anderson	8316497692		Agent	andersoa@pebblebeach.com	True
1062	Chelsea Colangelo	8316497642		Administrator	colangec@pebblebeach.com	False