



## **Module 6 : Taking / Managing Bookings - Establishing Job Requirements - and Time Planning**

- What information you need to gather from your client when taking a booking
- The tools available to help you manage and keep on track of your bookings
- Ways to manage your time more effectively
- Why you should consider making clients sign a booking contract

### **In this module you will learn:**

- What information you need to gather from your client when taking a booking
- The tools available to help you manage and keep on track of your bookings
- Why it is important to establish the requirements of each job with the client before you agree to the booking
- Ways to manage your time more effectively
- Why you should consider making clients sign a booking contract

## 6.1: Taking bookings



**When you take bookings from new or old clients, there are several very important pieces of information which you will need to gather from them.**

You will need their name and contact details so that you can get in touch if you need to; the exact nature of the event that they wish to book you for; as well as the time and the location of this event. With this information you can then assess whether or not you wish to take the job or not. Remember that just because someone has shown interest in hiring you, this doesn't mean that you have to accept the booking.

It can be an easy trap to fall into, especially at the beginning when you are just setting up your own business, feeling that you have to take every booking which is offered to you. If there is one which is too far away, is not at a convenient time or which you would not feel comfortable taking on for any reason, then it is perfectly within your rights as a self-employed balloon modeller to turn down any potential client.

**For example,** if the venue is too far away then it will probably not be financially viable to spend time and money travelling for so long.

Knowing which bookings to accept and which to refuse is a skill which will come with time, but try to trust your instincts and work out the costs before you say yes.

## 6.2: Establishing job requirements



**At the time of taking the booking it is very important to establish**

**exactly what the client will require you to do for them.**

You should never agree to work at an event for which you haven't been given the full details, as you never know what could lie in store. Instead, make sure that you ask the client exactly what they expect you to do at the same when they are making the booking. This will be much easier than having to cancel on them if you find out later that the job isn't what you expected it to be.

To help clients to work out what it is that they want, you should draw up a couple of different party plans for different occasions. Be very up front with what you could possibly offer your clients; send them a bullet point list of the different types of show that you can put on and a price breakdown for each additional extra service. This way, clients will know exactly where they stand in terms of requesting additional elements or bespoke shows.

You should be flexible as well. If the client knows exactly what it is that they want you to do, then don't refuse just because it is something which you haven't listed in any of your party plans.

If you are capable and willing to do what they have asked of you then go for it, but do not be afraid to charge extra if you will incur additional costs by agreeing to their job requirements.

## **6.3: Managing your bookings**



**Just because you are the only employee in your new company doesn't mean that you have to take all of your bookings manually by yourself.**

There are plenty of online platforms which can take track of your bookings for you.

There are even companies, such as bookingbug, which offer booking services which are linked up to your own website. These can help you to create customized booking widgets and platforms which match the look and tone of your own company and website.

<http://bookingbug.com/>

These websites will allow you to log on to your account and to track an up-to-date calendar with all of the details of your bookings clearly visible.

You can also download an app onto your phone or your table so that you can keep track of all of your

bookings even when on the move. You can set them up to send you text reminders for existing bookings and e-mails about new ones. If new clients book through your website then their bookings will automatically be added to your calendar so you don't have to worry about constantly updating it.

You can also take payments and deposits online, as well as getting clients to agree to terms and conditions. This can save you a lot of time and effort in terms of paperwork and can make taking bookings a much easier and faster process. This will leave you with more spare time to focus on other parts of the business, like marketing, publicity and the balloon modelling itself.

These online services will all let you start a free trial so that you can see whether or not it works for you and your business, before you invest in any long term subscriptions.

If you are not comfortable with using technology in this way, then there is absolutely nothing wrong with managing all of your bookings using a good old paper diary. You will just have to be extremely vigilant about keeping a record of everything in one place, and will have to be extremely careful not to lose the diary! Some people find that having a fixed calendar at home or in the office, which has all the same details as the diary written on it, helps to make sure that if you do lose any important pieces of paper or information, you still have a backup of everything you need to know in a safe, accessible place.

If you ring a client, or they ring you, saving their number in your phone using the date of their booking as well as their name will help you to keep on track of who's who. It will make it much easier to find the contact numbers of clients if you need to get in touch with them for any reason and will make sure that you don't accidentally delete important numbers from your phone thinking that they are somebody else.

### **Protect yourself with booking contracts**

To protect yourself from last minute cancellations, you should also issue a booking contract every time that someone hires you for an event. This doesn't need to be a particularly complicated document, but it should include important details such as how much notice clients need to give in order to cancel a booking; whether you take a deposit and how much that would be and whether you would consider returning that deposit under any circumstances.

If you get the client to sign this when they first make the booking, you will be protected if issues such as cancellations, postponements and changes to venue arise further along the line.

## **6.4: Managing your time effectively**



**As a self-employed person, setting up your own balloon modelling business, you will need to accept that there are limits to how much you can do within a given time period.**

You are not superhuman and you will need to make compromises with how much time you spend on one area of the business so that you can prioritize a different area as necessary.

As an entertainer, there will be certain times of the week in which you are much more heavily in demand than others.

### **Weekends will be your peak times**

You will have many more bookings made at weekends and in the evening than you will have Monday to Friday between 9 am and 5 pm. You could have a completely full Saturday with 4 or 5 different events and then nothing until the next weekend. When taking your bookings it is essential that you build breaks into your schedule as and when you need them. Make sure that you have time to eat, drink and rest between performances so that every single client receives the same standard of service.

One of the easiest mistakes to make when planning your time as a balloon modeller is forgetting to factor in the time it will take you to get from one venue to the next. Not feeling that you have enough time to reach your next destination is incredibly stressful and being late could have serious consequences for future business opportunities.

Research each journey well in advance, invest in a SatNav to avoid wasting time by getting lost and leave yourself plenty of time in case there is traffic on the roads.

## **Module 6 Summary**

### **Lessons Learned**

When taking bookings, ensure you have the client's name, contact details, the venue location, and the nature of the event; keep records of these for future reference.

Establish the exact nature of the job before committing, and consider asking the client to sign a

booking form to protect you from losing money through cancellations or postponements, as well as ensuring clarity about the specifications of the job.

You could make use of online platforms to help you manage your diary, as well as the internet to maximise the efficiency of your booking and payment process. Plan ahead for travel times and factor in breaks to make sure you provide a punctual and excellent service.

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