

ECOTOURISM

A woman wearing a hat, sunglasses, and a backpack is sitting on a large rock in a natural, rocky landscape. She is holding a camera. The background shows some greenery and a rocky cliff. The image is framed by decorative curved borders at the top and bottom.

Grow your Nature-based
Business to save time and focus
on delivering awesome guest experiences!

with Anita Simpson

Contents

Part 1:

Build A Business That You & Nature Will Love!	2
---	---

Part 2:

Find The Break In The Road	3
----------------------------------	---

Part 3:

How I Help My Clients	6
-----------------------------	---

Part 4:

Tranquility Isn't Just For Your Guests!.....	8
--	---

Part 5:

Eco-Tourism Industry Focus.....	11
---------------------------------	----

Part 6:

The Right Tools	14
-----------------------	----

Part 7:

Entrust And Delegate.....	17
---------------------------	----

Part 8:

Helping You Evolve Your Nature-Based Business.....	19
--	----

Part 9:

Bonus: Choosing a Booking System	22
--	----



Part 1

Build A Business That You & Nature Will Love!

Would you like to have the confidence to step-up and manage your business so you have full control of cash-flow, bookings and delegating management? Without compromising the guest experience?

Would you like to have a Business that you love and that works around your lifestyle?

Would you like to be able to generate bookings with new guests when you want to? And turn them off when you want to?

Of course you do! That's why you're here!

I'm Anita Simpson and I am so excited that you are here right now and taking a moment to invest in yourself and your business by reading my content designed especially for Ecotourism and nature-based tourism operators. You will already be in business or want to start your own business. Straight up, I want to thank you so much for promoting our beautiful wild places and our deep connection and need for them. I'll be stepping you through some very relevant information in this content that will help you setup your business so that you can do the following things:

- 1. Get integrated bookings that talk to your accounting software**
- 2. Having easy business processes**
- 3. Having access to HR advice and compliant systems**
- 4. Never be late again with your business compliance reporting**
- 5. Get your life back!**

But before we get into it, let's have a look at what might be stopping you achieve these things.



Part 2

Find The Break In The Road

Running a tourism business is hard work! The big hurdles are seasonality and cash-flow but there's lots of other things getting in the way as well. Call it the treadmill, the broken wheel, whatever it may be - let's just say we have to find a break in the road so we can change course!

Why isn't the road taking me anywhere?

It just goes on and on and isn't taking you anywhere, it's getting steeper and steeper uphill and you're going to have to put the brakes on at some point. You're getting piled up with things like:

- **You've got too much work,**
- **Your suppliers are hassling you for payment,**
- **Your guests are cancelling at a rapid rate and expect a refund "yesterday"**
- **Your guests are frustrated because of missing details in their itinerary,**
- **You're not making enough money,**
- **You don't have any time and your staff aren't turning up,**
- **What is a holiday?! - and**
- **Your family/personal life isn't as great as what you would like because you're just so overwhelmed and not present.**

What happens is we drive further and further until we actually have to press that big brake pedal to stop near the top of the hill.

What happens when we do that? We get pushed to the absolute limit where we just can't take it anymore, we break down on the side of the road!

It just doesn't seem worth it, right? I mean, sure you've got business coming in, you've probably been doing this for a few years or maybe longer and you've done alright so far. The paperwork gets backed up and the bills are paid late, but it gets done eventually. Reality check - This is not how a successful business operates, you deserve less stress and a better life - you've worked too hard not to!!

So the harsh reality for most operators on that journey is that they don't have systems in place or

contingency plans ready. They're having to do the hard yards and working incredibly long hours and feel trapped and overwhelmed. And they live in hope, I mean serious hope that maybe unbelievably good seasons are coming their way.

Have you found yourself thinking, "What am I doing? I'm creating more work for myself."

So HOW do we find the break in the road to find the best path forward?

Well that's what we are going to cover right here in this content, I've been working with tourism operators and other small businesses for 7 years now helping them find their path!

So ...

We think about systems in other parts of our business to deliver the most enjoyable and memorable guest experiences, whether that be guided tours, stays, cultural experiences or wildlife education etc. But what we do as business managers is we neglect to have a system for the business development, operations and our most important revenue-generating processes for our business.





Only operators with a clear and proven system for their business can say this one thing:

We have an amazing business and mission to promote and share our beautiful country and culture, we don't need to battle with our bookkeeping processes.



Part 3

How I Help My Clients

You may have gathered by now that I am pretty passionate about the service of accounting, bookkeeping and advisory for nature-based businesses. Of course, I haven't always been a bookkeeper, in fact I wasn't even interested in accounts less than a decade ago! I have however, been a wildlife and travel fanatic from a very young age. I'm thrilled to share that all images on this document are from my own camera, albeit amateur!

Basically what I'm saying is I share your passion and am super excited to be helping you. A positive here is all my accounts education is recent and up to date - Diploma in Accounting, Certificates IV in all Accounting, Bookkeeping, and Training and Assessment; and BAS Agent registration. I have a purpose behind all this as I'll explain in the following chapters.

Right now, I'd like to share a little bit of background so you know where I'm coming from. I travelled a lot as a kid because my parents had pretty sporadic types of work. This took me from the Hunter Valley in NSW (my Dad's country) to outback western QLD, to areas throughout the NT (Mum's country). My mother was at ease handling snakes (relocating them away from danger), looking after injured or orphaned wildlife and teaching me about animal names and bush tucker. She did a lot of camping and camp oven cooking including our bread. The bush was embedded in me.

I completed a Certificate in Childcare in the big smoke (Brisbane) to land my first jobs as a Governess on cattle stations, which I did for a few years followed by station cooking. I was then blessed with a family having two beautiful boys and undertaking a part-time degree in Applied Science (Wilderness Reserves and Wildlife) which I completed before my eldest turned 7.

My goal was to become a Park Ranger but with children and the travel required in the NT national parks space, it was a little too much. My degree pointed me in other directions including Zookeeper, Field Research Assistant, and Lecturer in Conservation and Land Management (CLM).

It was at this point I found myself at a roadblock, some health issues along with a little bit of guilt for losing precious time with my fast-becoming-adult sons made me stop abruptly. I quit my job and enrolled in the Cert IV in Accounting! Weird I know, but it was something service-based that I could build a business from home with. I knew a bit about bookkeeping because of my partner's trade business so I felt comfortable enough to take the plunge. I was lucky enough to get some casual bookkeeping work to complement my studies and off I went.

I'd like to share some random photos of my journey so far. Here is one of the CLM student graduation groups I trained in 2013. I'm on the far right. Of course, the flora and fauna units were my favourite to teach!



Me with a northern carpet python at the Territory Wildlife Park in 2003, at this point I was doing Work Experience in Industry as part of my science degree with the Uni of Qld. I LOVED it there!! I would later guide tours through the nocturnal house, one of my roles as a zookeeper :)



This was on a road trip in 2020 with my Mum (she's making blueberry pancakes!!). We travelled and camped for three weeks driving through the NT, Gulf Country, North and Central QLD. We created some incredible memories; not to mention some amazing nature photos for my clients' marketing!



This one was from a family road trip in 2009 through NT, SA, Vic & Qld. SA was one of the few state's I'd never visited so this shot was super exciting!!



It's kind of been a full cycle bringing me back to my passion for nature in my current business. So now you know a little bit more about me and my journey, let's get back to YOU and how we can get your business processes on track.

We're all about promoting and healing Nature

Join the Social Community

Come and join in the positive shares, discussion and tips in our social community that is focused on all things nature and business! We're on Facebook, Instagram, Twitter and LinkedIn. Get your business and mindset on the right track!

JUST FOR FUN!



Follow Us on Facebook



Part 4

Tranquility Isn't Just For Your Guests!

I'm really glad that you're here today and as I said at the start of this ebook, I'm excited too!

What a great business initiative you have to share amazing experiences and memory creations in an awesome part of the Country. You're at a road junction now and just need some assistance to make the best navigational choice. There's a good chance that when you created your ABN, company or business vision that nobody gave you the heads-up on how your accounts work or how to read financial reports! I've honestly worked with business owners that hadn't touched their record keeping in over 2 years and had no idea what their business was making or if they were even making a profit - how on earth can you make the best informative decisions to grow your dream without that knowledge?

Take a breather, you need the time to think about YOU. What do you want out of life? Take a look at the picture above. You want to feel free and in control, you want your life to be the best possible outcome both in your professional and personal life. You've invested some time now and that's great.

So how do you get there? It's quite simple really and most importantly *believe* in yourself. There's a few extremely important things I'll go through with you soon, but first I just wanted to share a couple of real client stories and how they transformed their businesses. So let's just keep focused as we go through the content together.

We'll get to processes and delegation, industry specifics and software in the following sections. Here are some amazing business owners that I've worked with that are getting business freedom and control! As a financial professional we are bound by confidentiality so I've changed names and used graphics here :)



Salina started a small tour business from scratch as a sole trader in 2019. Salina (almost 3 yrs on) now has 5 staff members including admin staff and takes regular time off for herself! She's achieved already what others only dream of.

"I had been in business with a few customers for 2 months before I approached Anita for a consultation. She went through some basics with me such as how a sole trader structure works, how to read a P&L and balance sheet and how I could pay myself properly. I'm so happy because I thought I had to put myself on a wage and almost lodged Single Touch Payroll! I didn't know that as a sole trader I had to put any personal stuff to drawings and payroll wasn't required."

A few months into it, Anita said I had to register for GST so she sorted that for me and gave me some training on how it worked - I had no idea and it would have been a nightmare trying to set up my payment gateway without her. I put on one casual employee and I became overwhelmed. I admitted I wished I'd never started this, I didn't realise it would be so hard! I wasn't making any money. I was a little shocked but pleased when she said I was turning over a small profit already and that I was doing great, particularly for a start-up. She said it usually takes a couple of years at least to make a profit and start moving forward."

I had chosen Xero and wanted to do everything myself, I was going to be a super successful business manager. But it got to a really stressful point when trying to work out overtime, time in lieu and awards that I accepted it was too much for me. I asked Anita to take over all the accounts. I had unknowingly messed quite a bit up and had to backpay some wages!! I felt awful."

I really love working with nature-based businesses and often they are so hard on themselves. Here are some quotes that I hear often and they certainly don't turn out to be an issue!

"I don't have time to capture receipts or do data entry, I'm too busy running my business"

"What is an equity account?"

"You're going to hate me!"

"I'm good at my job but I know nothing about accounting"



- ➔ **Gabe** has had a walking tour business for several years and is happy with his accountant that he's had for just as long. He's now got his books fully sorted. Just as well because he needed accurate turnover figures for government grants!

"I had met Anita on social media around 12 months ago as an industry bookkeeper and BAS agent. She'd asked to add me to her network because of the industry I was in. I didn't need a bookkeeper at the time but kept her at the back of my mind. It was a little weird how I'd only just lost my bookkeeper who quit on me, that Anita reached out again in an email. I jumped at the chance this time because I knew I was getting behind! I hate the bookwork and certainly wasn't going to do it myself, I never have the time anyway, I'm always getting prepared for the next tour."

What hit me the most when I started talking and working with Anita is how little I understood about the bookkeeper role and the accountant role. I just thought my accountant did everything and the bookkeeper did the data entry. When my accountant said I really needed a bookkeeper, I finally understood why my BAS was more than 6 months overdue! There was also outstanding bills showing in my software from 8 months earlier that should have been matched to payments already made. It seemed my old bookkeeper was a bit slack. It was a mess! Everything is up to date now and I'm so relieved."



- ➔ **Terry** sells photos and offers photography tour workshops. He reached out for a BAS Agent to help get several overdue BAS lodged. With Terry's permission, I set up a 6 month payment plan with the ATO.

"Anita was a great help, I didn't know you could set up a payment plan. I've engaged her to do my bookkeeping and BAS going forward. I was doing okay with Quickbooks Online but she explained how the GST centre and bank reconciling worked. There's things in there I didn't know how to use and it's a bit complex. She sends all my reports to the tax agent at the end of the year and she even answers their questions so I don't have to! I have way more time to do extra workshops and grow the business."

"What hit me the most when I started talking and working with Anita was how little I understood about the bookkeeper role and the accountant [tax agent] role."



Part 5

Eco-Tourism Industry Focus

In any business coaching, there will be some sort of concept to 'find your tribe'. This is super important for both mindset and business. Talking to people with common interests and avoiding those with negative attitudes toward what you're trying to achieve is key to success. Some of them just don't get it.

I will admit, I was drowning in negative content on social media, general media and face- to -face contact about so much devastation of our planet. This is because I was following the wrong types of people, businesses and pages. It made me so angry, I kind of sought out such stories, almost gravitated toward them, to verify my anger. I had almost lost hope in humanity and felt quite depressed.

It was really heart-warming to start following the right stories regarding all the positives and wonderful initiatives working to help our wild places and planet. I didn't realise what great things were in process out there and how I could help to promote them. Any bush restoration and rewilding or wildlife projects out there now, I'm sharing them! Doing something simple like putting a bird bath or frog pond in the back yard or community also does wonders for the soul! I adore sitting out in my quiet space among the trees and watching the birds, lizards and frogs. Have you checked out Slovenia Green, WOW!

When I first started my bookkeeping business, I didn't have a focus. It was at least 2 years after working for all sorts of industry clients that I had that lightbulb moment - what am I doing? Why aren't I working with like-minded clients? It was then I started seeking out ecotourism and nature-based clients. To add to this I needed another purpose, and that was to support wildlife and environmental charities.



It's so exciting! I absolutely love my business and watching my clients achieve their dreams. It's a win-win for both of us.

I recently registered *Bush Scents* which is my online store to help with donation funding. At the moment it is a basic store with a handful of Australian wildlife themed gift packs. I'm really excited with some ideas where to go with it.

Okay, back to the Ecotourism industry focus. It really is a specialised world out there and it makes such a difference to have a specialist niche (just like you do with your tourism or nature-based niche market). As an example, there are organisations and professional groups running specifically for your industry. They are the go-to groups when you need support and information. This is where I come into play, whether it be memberships with every state or territory's tourism department or Ecotourism membership, I'm on it, working for you and your best interests. I recently completed two training units in the industry, one for booking systems and the other in Tourism and Travel Management. I participate in workshops whenever I can, and remember it's about managing tourism to protect our spaces, too much tourism or bad management may have negative impacts.

I recently registered Bush Scents which is my online store to help with donation funding.

It's really easy to work with such purpose. This includes lifestyle, I love sightseeing and photography. Instead of boring stock images I use my personal wild images for my newsletters and social content. I also give my clients access to my photo galleries for their own marketing content.

The old saying is so true *"Find a job you enjoy doing, and you will never have to work a day in your life"* - by Unknown. Let's aim for that!



What if, instead of using a mainstream bookkeeper or advisor...

The Specialist Benefits

For starters, a mainstream bookkeeper won't have:

- » **Experience in tracking tours & activities**
- » **Industry knowledge**
- » **Access to industry updates**
- » **Shared passion**
- » **Experience in tourism software and integration**
- » **Know how to deal with pre-payments and refunds**
- » **Knowledge of Amusements, Events & Recreation Award**



So why does this matter? Because there are already systems in place on how to deal with your industry including the most up to date processes. Don't get me wrong, I know way too well the amount of software available out there to cover your needs - it's INSANE what is available right now to help tourism businesses! If you're thinking booking systems....I have some awesome news for you, at the back of this content there's a worksheet to assist you on choosing the right system :) sneak peek here.

This is part of the reason you need targeted assistance. I know that every business is unique and has it's own requirements. In this industry there is always research to do - I do it on a daily basis! Oh, and I understand your strange work hours too!

Did I talk about specialised management reports and cash flow forecasting? We'll get to that now.



Part 6

The Right Tools

What management tools are you using or want to use in your tourism business? I bet the first thing that comes to mind is accounting software. While it's important and the backbone of your finances to have accounting software, it needs to go way beyond that! Here is a list you should be considering:

- **Bookings**
- **Merchant fees**
- **Cashflow**
- **Workflow**
- **Payroll and Super**
- **Guest feedback**
- **Payment gateways**
- **Advisory**
- **Reporting**
- **Staff & rostering**
- **Digital signing**
- **Channel Manager**

You may hear it all the time....accounting software is all the same. Well, kind of. Not really.

For instance Quickbooks Online has great payroll integration with KeyPay which has built in fairwork awards and convenient recurring transactions; Xero and MYOB essentials have handy comms features for you to talk to your bookkeeper about individual transactions; and Reckon One can handle closely-held quarterly payroll pretty well. They all have some kind of receipt capture and matching functions but some work better than others. There are many pros and cons for numerous accounts software, it pays to drill down and find the best suited for you business needs.

You may hear it all the time...accounting software is all the same. Well, kind of. Not really.

- **Bookings**

Booking systems can be super complicated depending on your needs. Whether you need to constantly change availability, manage resources (eg. vehicles, sites, tours), send SMS notifications, offer promotion codes etc. etc. It can be draining!

Take a look at my *worksheet and tips* on choosing the right booking system. The trick is not to be over-whelmed – work out exactly what your 2 or 3 priorities are and work from there. Just say you offer camp sites or bush cabins and the options you need aren't there on the worksheet, there's space to add your own! What's included are just suggestions (including software logos/providers) so use it as a guide :)



- **Integrations**

Some software will have direct integration such as Xero and Stripe, others are a little more work such as using additional software like Zapier to make things work for easy automated workflows (like marketing platforms). Whatever your needs, there is usually a tech solution, you just need to find it! Try to aim for at least payment gateway and bookings integration with your accounting software, don't let merchant fees or refunds get lost - lack of reporting could be costing you money!

Most accounting software platforms will have their own payment gateway links - these usually work best if you send out invoices direct to guests, but this doesn't happen much with tourism bookings. Get what I mean with specialist industry needs?

- **Reporting**

Unless your business is unusually basic, offering just one simple service, then you'll need some decent reports to track your tours and activities, retail or hospitality offerings so you can make informed management decisions. This is where your accounting software needs to be setup correctly. It's a little bit more work to allocate your sales and expenses to business divisions - but believe me it's worth it! How else are you going to know what is generating revenue or costing you money? Do you need that extra staff member or is your advertising working? Reporting is very powerful when used correctly. Are your KPI's being met? Do you need to get that loan or are you able to invest? You get the picture.

That brings me to cashflow forecasting and budgeting. These two go hand-in-hand. Without accurate reports, you can't envision what the future may bring, what seasonal ups and downs to allow for or when your resources fluctuate. I like to use specialised cashflow forecasting software for the most accurate reports for my clients. The more up to date your accounts are, the more realistic the forecast.

When I prepare reports for my clients I always like to be a little proactive and give them the heads-up on what they mean. I add a little advice or suggestions for their business, and always include previous comparison periods.

- **Prepayments**

A quick tip on prepayments and refunds here. I've seen silly mistakes like reporting guest refunds as expenses, supplier refunds as sales and declaring prepaid income to your tax agent that was later refunded. You don't want your BAS messed up or paying unnecessary compliance payments to the ATO!



You don't want your BAS messed up or paying unnecessary compliance payments to the ATO!



At this stage you're probably thinking, but how can I wear so many hats? Let's talk assistance!



Part 7

Entrust And Delegate

In your current or desired business what processes and systems do you have in place for the smooth running of your operations? What is your mission statement or business plan? What is your end-goal? Do you have smooth workflows to make it happen?maybe?no?

Ok, so there's some work to do. It's not going to do it on it's own.

Start off by writing yourself a list of what needs to be done in your business. Eg. tours, record keeping, communications, membership compliance, payroll etc etc. Who does what right now?

There's a good chance you're a bit of a control freak, you like things done properly your way. I'm just going to say it - LET IT GO. You may be your own worst enemy. You've already proven that you're amazing, whether it be having your business up and running or completing that course or whatever it may be, you've got nothing to prove to anyone.

You may or may not have some staff onboard already. If you're like me and a bit weary of employing someone to help, there's no harm in trialling some casual help! From your list, what can easily be done by someone else? Or if not so easy, how hard would it be to write some procedures or create some training content on how it is done? Just have a think about employing or outsourcing some admin, tour guiding, business advisory, interpretation, marketing or payroll - give yourself some time to work on your tour operation.

It's all about building relationships and creating an awesome team, no matter how big or small to achieve your goals. This will obviously take time but think of the rewards. Do you want to get to the point where you can organise a multi-month vacation but see your operation continue? Delegation and trust is how you do it. The right expertise is how you do it. Trusting others is how you do it!!

If you're worried about employment like award rates, leave, overtime, super and contracts - this is something I do on a daily basis for my clients. It's not as scary or financially draining as you might think, in fact there's a good chance it will be financially rewarding. And it doesn't need to be done in-house, digital platforms means you can get help from virtually anywhere. A good habit to get into as well, is to get your staff to create their own work procedures and safely keep them in secured cloud storage - you may need them sooner than you think.

By creating the right processes and systems means the bulk of the work is done going forward, even in the growth and evolution of your business; you simply need to tweak and build on the hard work you already have in place. This is a super confidence builder and you will have a proven repeatable process forever in your operations. How good is that!

The main thing to take home from this section is sticking to your business plan and mission statement. Put it out there for all of the team and always make reference to it when creating any business processes. Don't lose track of why you began your business in the first place.



The last thing here is an industry reminder to know your ideal guest. Get in touch with their consumer journey. This is super important. Where do they hang out, what do they like and how do you connect with them or reach them? If you're not sure about this, your favourite tourism organisation will have some great info on how to best market your business.

A photograph of a small, light-colored lizard with dark spots, resting on a surface of fine, reddish-brown sand. There are some dry, brown leaves and twigs scattered around the lizard.

Part 8

Helping You Evolve Your Nature-Based Business

I really hope you've found some inspiration for your operation and have revisited the excitement of having an awesome and successful nature-based business. Our wild areas are incredible and it's our job to promote and protect them (and possibly restore more) for this and many more generations to come!

So here is what we want to do. I would love to hop on a super quick 15 minute chat to get to know each other and see if we can help! If we can, we can then book a second session for about 45 mins to create a mini roadmap to get you moving from where you are now to where you want to be.

We will identify some milestones, there are usually 2 -3, sometimes 4 things that we will plot on that roadmap. Then together we will talk about these milestones and how you can go about taking action.





At this point in the session one of two things will happen.

The first thing will be that if I can help you with some or all of the milestones with what I do with my accounts check and business advisory I will make a tailored recommendation for you. I will only make recommendations of things that I believe 100% will help you get the business to where you want to be.

The second thing that will happen is that if I don't think that I can help you with all of the milestones or some, I will absolutely tell you and I can make good recommendations for other resources in the industry for trusted people in my network that can help you get your business to where you want to go.

The thing is - that either way, you are going to come out of this session with one thing that you didn't have before and that is ...

Your Roadmap

With your roadmap, you now have the things you need to actually go and do to achieve the success you want in your business which you would not have had prior to the call. So this is super valuable.



**Book In for Your
Accounts Check**

Book Here Now

So let's just revisit again WHO these sessions are for:

- These sessions are for nature-based tourism operators who have already got the skills to provide awesome guest experiences, so even if you're only just starting out or early in your business, that's okay. But you've got to have those skills.
- Are for operators who want to have a real and successful business!
- Are for operators who truly love providing their guests with connections to the natural and/or cultural environment and that you really, really love educating and doing that.
- And are also for operators that understand you've got to have some skin in the game, you've got to be invested, this is your thing, this is your future, you've got to do the work and have a positive mindset.

Let's take a look at WHO these sessions are *not* for:

- So this is not for people who aren't prepared to think about things in a new way and do the work, or for people who make excuses and complain - no room for negatives here.
- People who do not yet have the right skills in tourism, and if you don't have that, then you will need to go back and get the required knowledge and do what you need to do.
- These sessions are not for people who are not serious about growing/evolving their business.
- And if you are in a mindset of you're happy to keep working the way you are, you don't need any assistance or extra time, then that's fine, but these sessions won't be valuable to you.

So what's next?

If you have decided that you are absolutely ready to go, 100% committed to change your business and work towards all the things you want to achieve then all you need to do is:

Step 1. Book your Accounts Check here.

Step 2. Complete your simple *Tell us a bit about yourself* Private Application where I just ask a few things about your business and what you want to achieve. This is necessary so I can be prepared for our time together and also see if I am going to be the right person to help you achieve the results you want. Remember I said earlier that I am all about transparency and pointing you in the right direction!





Part 9

Bonus: Choosing a Booking System

Before I finish off, I'm really happy to share my worksheet below on how to choose the RIGHT booking system for your operation! It was inspired from an awesome workshop I did earlier in the year with our local tourism body. I love helping my clients any way I can! My original version didn't include any booking system platform logos to avoid persuasion (there are way more than what is shown so don't discount others you may find) but feedback from start-ups that needed an idea what was available is why I included some so they could start their research. I hope you find it useful for whatever operation you are delivering for your guests!!

So, if at this point you have made the decision that you are ready to take action and commit to yourself and your life and are ready to book your Accounts Check, then I'm super excited to be connecting with you and I can't wait to hear all about your dreams for your future and most of all how we can work together during our session.

I sincerely hope that what I've shared with you in this content has created a shift in the way you think about your business and also make your dreams and goals seem a little closer and achievable for you.

Talk soon,

Anita



Choosing a Booking System

WORKSHEET & TIPS

With the vast array of booking systems out there, it can be a little overwhelming to choose the right fit for your business. Don't worry - in just 3 steps you can make it simple!

1

Booking requirements

Use **checklist A** below to list all the booking system requirements you need. Give each item a rating of 1 to 3 with 1 being of utmost importance! E.g. 1, 2 or 3 in each box.

2

Business requirements

Use **checklist B** below to list all the business/operations system requirements you need. It is important to rate them 1 to 3! All of those of super importance to business, give a 1.

3

Your priority list

Use **section C** below to list all the booking system requirements that are critical (your 1's from both sections!).

Checklists



A

Bookings

Pricing rates

Payment gateway

Online sales

Ticketing

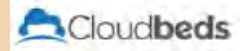
Promotion codes

Seasonal options

Channel manager/connections

Quick tip - only 4 1's allowed!

1





Quick tip - only 4 1's allowed!

Talks to accounting system

Booking validation on arrival

Ability to close bookings at short notice

Resource management (vehicles/tours etc)

Bundle services

Customer notifications


Reporting

Purpose based (tours/attractions/rooms etc)

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Must haves



List all of your priority 1's here! This is the critical checklist to crosscheck against prospective booking systems/trial stage. Shortlist no more than three systems to trial.



At trial stage, use priorities 2 or 3 if needed



Tips

Ensure your 'Must have' list includes everything required to run your business successfully (check it off when trialling the system)

If there are gaps in your checklist - ask if there is a workaround or is on the roadmap for inclusion

Use your free trial to your advantage - can a demo consultant set up your system for you?

PCI for payment gateways is important but also ask for AoC (Attestation of Compliance) to ensure security

Check what system support is available - 24/7 phone support or self-help database. Is it onshore/offshore?

Check payment merchant booking fees, subscription fees and other hidden costs such as channel/app costs

Notes

