# 26 Contact Client for Goals Information

## How to Get a Manager Check-Off

Working with the Challenge Center Manager or Challenge Center Program Assistant, contact an upcoming client via phone or email regarding their upcoming program to discuss their goals and day-of logistics.

## Procedure Details

Hopefully a client has turned in their Goals and Expectations Form by the time you sit down to write your itinerary. The Goals and Expectation Form should have a digital copy in their client folder, as well as a hard copy in their paper folder. If we have not received a Goals and Expectations Form from your client, check in with the Sales Team to see if they have any information as to why there is a delay in their paperwork.

The Goals and Expectations Form is your first introduction to your client, but there is always more to learn and things to remind them of. About one week prior to your program you should begin reaching out to connect via phone or email. Many times a phone call is the quickest way to exchange all necessary information, but sometimes email is best for the client.

When contacting the client, remember that you are representing Peak Adventures. While talking to your client or leaving a voicemail, you want to speak clearly, professionally, slowly, with a smile on your face. Talking on the phone while smiling will come through to the client that you are happy to be talking to them. If you end up leaving a voicemail, it is good practice to follow with an email, as many people prefer this mode of communicating. On the Staff Resources webpage, there is an email template for you to use, if you so choose.

Once you make contact with them, it is important to review the following:

* Share with them that you have received their Goals and Expectations, ask any clarifying questions you may have, and ask if they have anything to add. The more you know about the group, the better you can tailor their itinerary.
* Everyone attending, regardless of participation level, must complete our 2-page waiver. Anyone under the age of 18 must have a parent or guarding signature on both pages.
* Everyone attending, regardless of participation level, must wear close toe shoes.
* Confirm the date, times, and participant numbers as there are sometimes miscommunications between the client and the Sales Team.
* For school groups coming for a full day, it is good to know when the kids are used to eating lunch and plan your lunch break around that time. Some schools eat lunch as early as 10:30!
* Discuss any weather concerns.

Every once in a while, you might have a client that you are unable to make contact with, but it is important that you try. At a minimum it is important to communicate, whether in a voicemail or email, that everyone attending must complete our 2-page waiver and wear close toe shoes. Move forward writing an itinerary to the best of your ability and be ready to be a bit flexible the day of your program.