

## **Travel Coordinator Tasks**

**Document Last Updated – 7/28/2023**

### ***Responsibility – Workflow Manager / Brittany***

On the majority of jobs, we need to physically inspect the property, which entails visiting and photographing the hotel. Coordinating the inspection is the first step in the appraisal.

- Properties could be anywhere in the US and will be a mix of driving and flying
- This role entails the following steps:
  1. Setting up the inspection (with borrower / appraiser / Zeb)
  2. If needed - booking the travel reservations (flight, car, hotel)
  3. Updating the calendar, setting up a zoom meeting, and emailing Zeb and appraiser all meeting details.

### **Major Considerations**

- Zeb will be traveling on 75%+ of inspections and is generally available Mon-Fri.
  - Exceptions will be if appraiser wants to travel, if client requires appraiser to inspect, or for local jobs where it is easy for appraiser to inspect (near Atlanta or Birmingham).
  - Check with the appraiser to find out who is inspecting.
- Properties could be anywhere in the US and will be a mix of driving and flying
  - Make decision for driving vs flying on cost / time, and ask appraiser if you need help determining.
  - You will often need to price out both ways to see which makes the most sense.
  - For driving jobs, Zeb will rent a car and coordinate himself. Nothing for you to do regarding booking travel on these.
  - For flying jobs, you will need to book his entire itinerary – flight, rental car, hotel room.
- Focus on keeping overall costs as low as possible, because we pay for our own travel
- Timing – our work assignments have quick deadlines that typically range from 2 to 4 weeks
  - We need to arrange the site inspection with enough time to complete the assignment after it, but want to book as far out as possible because flight costs will be lower.
  - Best practice is to nail down the inspection date/time immediately with Zeb/appraiser/borrower, and book flights as far in advance as possible to get the best price
  - Ideally, we can inspect the property a week before the assignment is due, but if there only a few days due to circumstance or rush timing, that is fine. Needs to be at least 2 days before it is due so Zeb has time to send photos.
- Whenever possible, we want to combine trips to increase efficiency and save money
- Paying for travel: We will give you a company credit card to use. Appraisers may opt to give you their personal credit card to use for them (for points)
- About combining trips:
  - It often makes sense to coordinate multiple (typically 2 to 4) hotel inspections on a single trip. We may get one in CA and one in CO.
  - In these situations, you can often time the travel to fit it into the same amount of time (i.e. 2 days of travel).
  - Best method is to look at each option separately (i.e. shop the itinerary if you flew from ATL to CA, then to CO, then ATL ... then shop if you started with ATL to CO, then to CA, then to ATL). Choose best way based on time and price.

## **Step 1, Setting up the Inspection**

As soon as a new job is received, the Workflow Manager (WM) will create a file and save a copy of the Engagement Letter (EL) in the file

- WM has two immediate tasks: figuring out the best date/time to inspect the property, then reaching out to the borrower to 1- confirm that time and date and 2 – to request information for the appraisal.
  - Confirming inspection date and time is the highest priority task, because we need that before we make any travel arrangements like booking flights, which are not refundable. Ideally, we can get the inspection date confirmed and travel arrangements made within 1 to 2 days of getting a new assignment.
  - The vast majority of the time, the borrower will allow us to inspect on a requested date, but sometimes they are less flexible
- **Task 1 – Determine best date and time**
  - Step 1 - first, look at when the appraisal is due, Zeb's schedule, and what other jobs we are working on to see if it is possible to coordinate this with another trip.
    - First thing to check is other active jobs to see if the new assignment can be combined with a trip we already have scheduled, or one we still need to schedule. **Always combine trips when possible – this happens about 25% of the time.**
    - Consider other jobs we have bid on but not yet awarded. Easy way to check that is in Filemaker Pro, go to Bid Log Summary and search all "Open" jobs
    - For driving trips, timing is less of a consideration as the cost will be similar to rent a car locally; but for flying trips flights can be much less expensive 2 or 3 weeks out.
    - Look up address of hotel using Google Maps <https://www.google.com/maps> and estimate how long it will take to travel to the hotel, inspect it, and get back to the airport / home
      - Very long days are often typical, where you may catch an early flight out (6am) and catch a late flight back, getting home at 10pm. Generally better to have a really long day than split into two. Guideline for driving distance is usually 6 to 7 hours – more than that often makes sense to fly if you can day trip it.
    - Generally, you want to schedule it about a week before the appraisal is due – scheduling it farther out helps reduce flight cost, and also allows for other jobs to pop up that could be combined
  - Step 2 - Once you have an idea of Zeb's schedule and other jobs, assuming there isn't a good trip to combo with and you are booking fresh, you need to price out flights, car rental and hotel costs.
    - They will vary by date, so you need to do some searching.
    - You want to pick the day that's the lowest cost but works with our timing.
    - See detailed instructions for Booking Travel on following page.
- **Task 2 – Confirm travel plans with appraiser and Zeb**
  - **Use Email template (Template 1)** to email appraiser and Zeb a quick summary of the proposed date and cost. This also includes a list of proposed due diligence items.
  - Text both as well to make sure you get a fast response.
  - At this point, we know when we want to inspect, and now need to confirm with borrower so we can move on to booking the travel and setting it in stone.

- Task 3 – Reaching out to borrower
  - **Reach out by email using email template (Template 2)**, and follow-up by text / phone if you don't hear back quickly.
    - Template 2 includes both the proposed inspection date and time as well as the list of due diligence information we want to request from the borrower, modified as needed by appraiser's response to Template 1 email.
    - For flying trips, we want to nail down the date as fast as possible, because prices will change quickly and we are usually booking on short notice already.
      - Follow-up the day after you emailed with email plus text / call until you hear back.
      - For most people, you will hear back quickly.

## Step 2, Booking Travel

## 1. Flights

Search for flights using both Google Flights <https://www.google.com/travel/flights> and Southwest <https://www.southwest.com/>.

- Google Flights should show all airlines except for Southwest, so you have to check both
- Historically Southwest has been very competitive on price and we prefer them, but not since COVID. Southwest is the best option if prices are similar, because they can be cancelled / changed without fee
- Nonstop flights are better whenever possible, because there is less chance of delays screwing up the itinerary
- It usually makes sense to book non-refundable fares because of price differences

Make decision based on timing and cost.

- A long day trip is usually cheaper / better than an overnight trip. With the Atlanta airport, you can do a lot of trips in a day trip.
- You can do a trip almost anywhere in the US in a 2-day trip

### ***Steps to Book Flights:***

- Google flights tutorial – using example of inspecting a hotel in Rockford, IL:
  - Step 1 – Search time needed using Google maps. Enter in directions from Rockford, IL to Chicago, IL ... [which is about 2 hours](#).
  - Add up how much time you need on the ground. Factor in 4 hour total drive time + 90 minutes to inspect hotel = 5.5 hours. Need 45 minutes to pickup car and get to airport 1.5 hours before return flight = 7.75 hours between flights.
  - Chicago has good, generally cheap, direct flights so this is easily doable in a flying day trip.
  - Step 2 - Go to google flights and look up round trip flights from Atlanta to Chicago (both airports). I am searching this on 7/26/2023 and this screen shot shows the search results – note how the price drops significantly one week out to less than \$100.

Atlanta

Round trip

Reset

Departure

Return

July

S	M	T	W	T	F	S		S	M	T	W	T	F	S
						1				1	2	3	4	5
										\$58	\$58	\$108	\$124	\$138
2	3	4	5	6	7	8		6	7	8	9	10	11	12
								\$193	\$131	\$78	\$58	\$79	\$107	\$115
9	10	11	12	13	14	15		13	14	15	16	17	18	19
								\$125	\$76	\$56	\$43	\$52	\$78	\$78
16	17	18	19	20	21	22		20	21	22	23	24	25	26
								\$77	\$47	\$33	\$43	\$52	\$66	\$54
23	24	25	26	27	28	29		27	28	29	30	31		
			\$564	\$349	\$330	\$206		\$74	\$47	\$33	\$43	\$67		
30	31													
\$310	\$168													

August

S	M	T	W	T	F	S
		1	2	3	4	5
		\$58	\$58	\$108	\$124	\$138
6	7	8	9	10	11	12
\$193	\$131	\$78	\$58	\$79	\$107	\$115
13	14	15	16	17	18	19
\$125	\$76	\$56	\$43	\$52	\$78	\$78
20	21	22	23	24	25	26
\$77	\$47	\$33	\$43	\$52	\$66	\$54
27	28	29	30	31		
\$74	\$47	\$33	\$43	\$67		

- Based on the above, I chose Wed Aug 2nd, with results that look like this:

Round trip · 1 · Economy

Atlanta ↔ Chicago






Wed, Aug 2 < > Wed, Aug 2 < >

All filters Stops Airlines Bags Price Times Emissions Connecting airports Duration

Track prices Aug 2 Any dates Date grid Price graph

**Best departing flights**

Ranked based on price and convenience Prices include required taxes + fees for 1 adult. Optional charges and [bag fees](#) may apply. [Passenger assistance](#) info. Sort by: ↑

	6:00 AM – 7:24 AM Frontier	2 hr 24 min ATL–ORD	Nonstop	66 kg CO <sub>2</sub> -33% emissions	\$58 round trip
	7:38 AM – 8:52 AM Spirit	2 hr 14 min ATL–ORD	Nonstop	94 kg CO <sub>2</sub> Avg emissions	\$118 round trip
	6:15 AM – 7:26 AM American	2 hr 11 min ATL–ORD	Nonstop	107 kg CO <sub>2</sub> +8% emissions	\$203 round trip
	6:30 AM – 7:36 AM United	2 hr 6 min ATL–ORD	Nonstop	110 kg CO <sub>2</sub> +11% emissions	\$258 round trip
	7:20 AM – 8:20 AM Delta	2 hr ATL–ORD	Nonstop	108 kg CO <sub>2</sub> +9% emissions	\$408 round trip

- The departing times of the Frontier and Spirit flights were ok, but the return times didn't work. Spirit got back after midnight (too late / long) and Frontier didn't allow enough time on the ground.
- I decided to search farther out and selected August 9<sup>th</sup> instead. That date has some better options, with Spirit and Frontier both at under \$100 with doable day trips
- Step 3 - I also searched on Southwest, which has nonstop daytrip options, but more expensive at about \$225
- Step 4 – Conclusion. In this scenario, the best option is Spirit, and I would book this flight which is \$75:

Atlanta ↔ Chicago



Round trip · Economy · 1 passenger

Share

**\$75**  
Lowest total price

Track prices

**Selected flights**

	Wed, Aug 9 · 5:40 AM – 6:51 AM Spirit	2 hr 11 min ATL–ORD	Nonstop	94 kg CO <sub>2</sub> Avg emissions
	Wed, Aug 9 · 4:20 PM – 7:27 PM Spirit	2 hr 7 min ORD–ATL	Nonstop	78 kg CO <sub>2</sub> -20% emissions

1 carry-on bag available for a fee

- Step 5 – Book the flight
  - Click the google flights button to “Continue” and book with Spirit. This will take you to Spirit’s website
  - Login with Zeb’s info from the Excel Sheet listing his frequent flyer info
  - Book flight, with no paid upgrades whatsoever, using company or appraiser credit card
- Step 6 - Print confirmation to PDF and save in “Travel Info” folder in job file

## 2. Hotels

Hotels are less frequent as many jobs are day trips. We have a discount code with Hilton that can be used the vast majority of the time, but requires a specific process to use.

### **Steps to Book Hotels:**

- **Step 1** – Important – use this specific link, or it will not give the 50% off discount.  
<https://www.hilton.com/en/go-hilton/>
  - Log in using Zeb's Hilton Honors credentials
- **Step 2** – Search for hotel and select based on price and proximity to where he will be. Usually booking near the airport to make it easy to catch a flight.
  - If discount is working, the price should be between \$50 - \$100
  - Prefer limited service hotel like Hampton Inn, Tru, Home2, Homewood Suites. These usually have free parking
    - If booking in a large city, make sure to manually look up parking cost before booking at consider that in the overall cost. Some cities like LA can have huge parking costs of \$50+ that influence the decision
- **Step 3** – If price is high – say much over \$100, consider other options. Do a search using Kayak.com <https://www.kayak.com/> to price out other options, then make decision
- **Step 4** – Make reservation, and save PDF in Travel Folder

### **3. Rental Cars**

Rental cars can be trickier to book, because prices are often different between OTA websites (like kayak or booking.com) and direct through the car rental websites.

- Always book refundable (pay at desk) fares, because our plans often change
- Prefer to book directly through a car rental site vs the OTA (i.e. kayak) because there is a lower chance of getting bumped if they are short on cars
- Remember, for non-flying jobs (usually within 6 to 7 hour drive of Atlanta), Zeb will handle his own rental car and you have nothing to do
- Book something bigger than economy or compact (like standard or intermediate) for Zeb
- In most cases, we want to book with a larger car company: Hertz, Avis, Budget, Dollar, Thrifty, Six, etc. There will be times when they are not available and you may even look at other options like Turo.
- Regarding insurance – decline all coverage, Zeb gets coverage through his credit card, which he will use to pay
- Regarding fuel option – decline all add on options, Zeb will bring it back full
- Be sure to search airport locations. It is easy to search for a non-airport location by just entering the city.
- Don't book Teslas – they are hard to refuel

#### **Steps to Book Rental Cars:**

- Step 1 – Search the best options for a particular airport using Kayak.com  
<https://www.kayak.com/>
- Step 2 –Based on the search results, pick the 3 largest car companies that have the lowest rates
- Step 3 – Login to each of those 3 companies websites directly with Zeb's credentials and choose the one that has the best rate
- Step 4 – Make reservation, and save PDF in Travel Folder

### **Step 3, Updating Calendar, Zoom, Email Notifications**

Once the inspection has been nailed down and travel arrangements have been made, we need to update our shared calendars, inspection logs and send out an email to Zeb/appraiser with inspection details.

This involves several steps:

- **Step 1** – Schedule Zoom Meeting
  - Log in to Zoom using Adam’s paid account
  - Click on meetings, then click “Schedule a Meeting”
  - Set date and time. Only important things to check are:
    - 1 – Meeting ID – select 2<sup>nd</sup> option with Personal Meeting ID – this uses the same ID every time which is specific to our account
    - 2 – Security – unclick the passcode, so no passcode is needed, and also unclick waiting room, so people can join automatically
    - 3 – Copy relevant meeting details (url link and passcode), which you will include in the calendar invite AND email to appraiser/Zeb
- **Step 2** – Update Shared “Zeb Inspection Calendar” via Google Calendar
  - 1 – Block out the days he is traveling with note like “Zeb in CA for John”. For example, if he is traveling on 7/28 – 7/29, block out both dates with that title
  - 2 – Create specific meeting for his inspection based on the inspection time and invite both appraiser and Zeb, which will put it on their respective google calendars.
    - Note – if non-MAI (i.e. Daniel) is doing the job, also include the supervising appraiser on the invite.
    - For example, if the inspection is on 7/28 at 1pm, create a meeting from 1pm – 2pm and title it “San Jose Dream Inspection” (hotel name).
    - Include Zoom meeting link and meeting id (meeting ID always the same). This makes it easy to access for everyone
- **Step 3** – Update Inspection Log
  - We use an excel sheet to track Zeb’s time for his payroll. This is saved in: Dropbox/Zeb-Travel Info/Inspection Log – Zeb
  - **Important – this is a live document, so be careful not to delete anything**
  - To add a new job, just copy/paste a relevant job into the bottom, then estimate hours using the guide.
  - Follow instructions at the bottom - you basically take his itinerary and account for travel time, and estimate his hours.
- **Step 4** – Send email to Zeb / Appraiser with all details about the inspection
  - **Use email template (Template 3)**
  - This email needs to convey all details about the inspection, including address, meeting time, who Zeb is meeting with, etc
  - Attach Zeb inspection form and PDFs of all travel itinerary (hotel, flight, car, etc)
    - Inspection form is an excel sheet and you need to manually add some info about the subject property before sending.
    - Excel sheet saved in Dropbox/Zeb-Travel Info/Zeb Inspection Form Template
    - Export subject from FMP (property record card detail) and copy/paste into input tab of sheet. Then do same with STR comp set, or manually enter those if faster.
  - Include Zoom meeting link and meeting ID