

# The renewals process

Last Modified on 15/01/2021 11:48 am GMT

**If you have annual bookings we would recommend booking these in to all start and finish around the same time. We would suggest either academic year or calendar year.**

We follow this process in our Northampton BookingsGuru office and have found it to be very beneficial in streamlining our administration processes and improving our clients experience as well as the following benefits:

- Once a year process
- Opportunity to implement a price increase.
- Clear indication of availability as all your current clients bookings are in the system
- Ensure all customers have their documents up to date
- Income can be projected for the full year

**The basic steps are as follows:**

- Print current bookings
- Consider price increase:
  - For Individuals or
  - General Percentage increase
- Put provisional bookings in
- Send provisional notifications with amended information
- Follow up to ensure everyone has confirmed (use Bookings Value Report to identify provisional bookings) and provided the necessary information.

**The process:**

It is advisable to email all clients first to inform them that renewals are being created, make them aware of any price increases, any deadlines required for confirming their provisional bookings and any other updates you may have. This also prompts them to let you know if they do not want to continue with their bookings.

Firstly, decide if you would like a percentage price increase across the venue as a whole or just an increase for certain bookings and/or spaces.

Then identify which clients have annual bookings that need to be renewed – an easy way to do this would be via the [ **Bookings**] tab, [ **Dashboard**] or by looking at that central 'Last Booking' column on the [ **Clients**] tab.

Check all clients have all documents required. Check all current documents and add reminders to ensure when they do expire you are notified 2-3 weeks prior in order to email the client and get them to send you the new document.

**Creating the booking:**

As a time saving option, a 'Renew booking' button has been created exactly for this process. This is located within the existing booking, click edit, then scroll to the bottom of the page, it is on the right hand side.

For full details on this process, see our 'Renewing a Booking' guide [here](#).

### **Provisional emails:**

While doing this process, it is a good idea to temporarily amend the text on your automated Provisional Email template to ensure that customers are aware of the renewals process and any additional requirements. If you are doing your renewals as a bulk job, before sending the provisional emails you can put a few paragraphs of text into the Provisional template in the system to avoid having to email each customer individually. This can be found in the [Manage tab], click edit venue, Emails, and scroll down to **'Provisional bookings Email'**. Cut out the first paragraph and paste it somewhere safe, then insert the below:

Please see sample text below:

*'We are currently renewing all bookings for the period 1st September 20XX to 31st August 20XX and have reserved a PROVISIONAL booking for you. There has been a small price increase so your price has been adjusted, please login to your account and double check that we have reserved the correct dates and times for you and to view your new pricing. There will be a separate booking for each day that you book with us (if applicable). Please click the green 'Confirm' button on each booking form to accept the booking. If you have any amendments to make, please let us know by email as soon as possible, and we can action that for you.'*

*Please be reassured that even once you have confirmed your booking we are able to make any amendments and cancellations without charge providing 7 days' notice is given.*

*We kindly ask that you confirm your bookings for next season by XX/XX/XXXX. Please note that your booking is not secure until we have received confirmation. After this date, we will assume that you no longer require your booking. Please do not hesitate to ring us if you need to amend or double check anything.*

*Please be aware that we will not know any dates that the school require use of the facilities in the evenings (for parents evenings etc.) until they start back in the new term. We will write to you as soon as possible to advise if any affect your bookings.'*

Once this is done it is important to change the Provisional template back to the original paragraph.

### **Invoicing:**

As you will be aware, you can only invoice confirmed bookings, therefore it is important to ensure all bookings are confirmed ahead of your invoicing date. The provisional bookings section on the Dashboard is ideal for monitoring this.

---