



Case Study # 5

The Anniversary Couple

Case Study Details:

Larry and Mary Schneider will be celebrating their 35th wedding anniversary in late October. The Schneiders own a highly successful antique dealership/auction house in Chicago, specializing in Americana. You met the couple at a recent alumni fundraiser for Northwestern University, for which the Schneiders are major contributors.

During the reception, you discover that the Schneiders want to take a special trip for their anniversary, but are undecided as to what, where and how. Apparently, they've had some bad vacation experiences of late – largely due to the inept handling of their needs by their now former travel agent. The Schneiders are friendly, unpretentious and affluent – a pleasant combination. You wonder how their ex-agent could have so mishandled their account.

You ask about one of their last vacations. “A few years ago, we really wanted to see Europe – to take some time and visit Paris, London, Rome, the classic cities,” began Mary. “We had three weeks set aside. My husband feels very uncomfortable about flying, and flies only when he must – right honey?” Her husband nods in agreement. “Perhaps the only good thing our agent did for that vacation was book us on a transatlantic cruise on a super deluxe ship. Everything about the cruise was perfect – the service, the food – oh, the food was superb – the entertainment, a wonderful cabin...”

“It sounds like you were very satisfied,” you comment. “Right up until we got off the ship,” Mary answers. “After that, it seemed like every hotel we stayed in was, well, second-rate.” “At best, second-rate,” Larry adds. “Our agent also proposed that we fly from city to city. We had to suggest a Europass. And the few restaurants and attractions our agent suggested were so touristy,” Mary says emphatically. “I just don’t think our agent had any idea where to send us – it was as if the selections were all picked from a ‘Whirlwind tour of Europe’ brochure or something.”



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“But you enjoyed the cruise,” you note, “why not choose to cruise again

This time Larry answers. “We did. Two years later, we had to be in Los Angeles for business. Mary and I drove out West and visited some areas along the way. We decided to give our agent another chance and booked a 7-day cruise to the Mexican Riviera out of L.A. through her. It was on a ship our agent had sailed and loved, and guess she thought we would love also...”

“Well, we didn’t,” Mary says. “It wasn’t so much the cruise,” she continues. “The food, cabins, and entertainment were fine. It just wasn’t...well...” she looks to Larry for assistance.

“...Right for us,” he says, finishing her thought. “We’re kind of low-key people,” he explains, “and most of the things about this trip: the destinations, entertainment, other passengers – and don’t get me wrong, we met some wonderful people – were of the energetic, ‘sun and fun-type.’ We had a good time, but it just wasn’t quite our cup of tea.”

“And Larry sunburns easily. I warned him, but you should have seen the top of his head,” Mary laughs, “it was almost as bad as our Hawaii trip years ago.”

“Why do you think your agent recommended a ship that didn’t fit your needs?” you ask, “especially after the great experience you had on your transatlantic trip?”

“Who knows,” Mary responds. “Our agent didn’t ask for our feedback after either vacation.”

The conversation veers away from travel, and you learn a bit more about the Schneiders. They’re members of a local country club where they regularly play mixed doubles tennis. Larry enjoys an occasional round of golf, and his wife



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participates in membership bridge tournaments. They also frequent the club's formal dinner dances and cocktail parties.

You mention that you're an avid tennis player, too. Mary looks at Larry when you say this, and seems to read his expression, before saying, "You should join us for dinner at the club sometime. They have some wonderful theme nights..."

Essay Questions:

In your essay, answer the following questions based on the scenario described above:

- Do you feel it would be appropriate to approach the Schneiders about becoming their travel counsellor? Why or why not? How would you approach them?
- Do you think one of the two is the decision maker in the Schneider family, or are decisions equally shared? Why? How would your conclusion change your sales approach, if at all?
- What errors, both basic and specific, did their former agent make in handling their travel plans? How would you do things differently?
- If you became their travel counselor, and considering their last cruise, how would you persuade the Schneiders to cruise again?
- Based on their profiles, what cruise product would you suggest for their special anniversary? Why? What other cruise line would you recommend? Why?
- What itinerary and destination would you recommend? Why? What alternative destination would you recommend? Why?



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- How would you get the Schneiders to and from their departure point?
What back-up transportation would you suggest?

- Do you foresee additional business opportunities with the Schneiders? If so,
what opportunity or opportunities seem to be present?