**Regional Sales Operations Workflow**

**1. Inquiry Screening Stage**

**Key Participants:**

* **Regional Sales** (Lead)
* **Customization Specialist** (Support)
* **Assurance Specialist** (Support)

**Specific Workflow Steps:**

1. **Answer basic client inquiries**: Provide general information about charter services.
2. **Provide estimated pricing**: Offer preliminary price estimates based on client needs.
3. **Gather special requirements**: Record specific client requests, including travel details and preferences.
4. **Create client profile**: Register client details in the system.

**2. Quotation Preparation Stage**

**Key Participants:**

* **Regional Sales** (Lead)
* **Customization Specialist** (Support)

**Specific Workflow Steps:**

1. **Complete itinerary and special requirements**: Ensure all details are accurate.
2. **Order claim**: Confirm availability and feasibility of the requested charter.
3. **Review and coordinate requirements**: Validate all collected information.
4. **Request quotations and input proposals**: Gather pricing from operators and enter proposals into the system.
5. **Generate quotations and present to the client**: Compile the best options and send them to the client.

**3. Communication and Quotation Optimization Stage**

**Key Participants:**

* **Regional Sales** (Lead)
* **Customization Specialist** (Support)

**Specific Workflow Steps:**

1. **Analyze and recommend quotations**: Provide the client with insights on the best options.
2. **Address frequent inquiries**: Create a group chat or include the Customization Specialist in emails for better assistance.
3. **Re-negotiate the price with the client**: Adjust pricing as per client discussions.

**4. Agreement Signing Stage**

**Key Participants:**

* **Regional Sales** (Lead)
* **Customization Specialist** (Support)

**Specific Workflow Steps:**

1. **Draft client agreements**: Prepare formal documentation for review.
2. **Request operator's contract**: Obtain official agreements from the charter operator.
3. **Send agreements to the client**: Forward the contract for client review.
4. **Follow up on client signatures**: Ensure timely signing and return of agreements.
5. **Submit agreements for internal approval**: Get required organizational clearance.
6. **Finalize and sign back agreements**: Close the documentation process.

**5. Payment Collection Stage**

**Key Participants:**

* **Regional Sales** (Lead)
* **Finance Team** (Support)

**Specific Workflow Steps:**

1. **Submit agreement for approval after the client returns it and makes the payment**.
2. **Process payment to the operator**: Submit approval for transferring charter fees to the service provider.

**6. Flight Assurance Stage**

**Key Participants:**

* **Assurance Specialist** (Lead)
* **Regional Sales** (Support)

**Specific Workflow Steps:**

1. **Transition flight details to the assurance system**: Enter all confirmed information.
2. **Coordinate flight preparation details**: Ensure seamless execution of charter operations.
3. **Provide extended flight-related services**: Offer additional support such as ground transportation, VIP handling, etc.
4. **Promptly notify sales of itinerary changes**: Keep all stakeholders informed about last-minute changes.
5. **Re-negotiate the price with the operator (if needed)**.

**7. Post-Flight CRM Stage**

**Key Participants:**

* **Regional Sales** (Lead)
* **Finance Team** (Support)

**Specific Workflow Steps:**

1. **Submit invoice application**: Process invoicing for the client.
2. **Verify and record all financial data**: Maintain accurate transaction records.
3. **Send points information to the client**: Provide details on earned points or loyalty benefits.
4. **Submit commission payment approval**: Process compensation for relevant stakeholders.
5. **Finalize commission payment**: Complete commission disbursement.

**Decision Points and Actions**

| **Decision Point** | **Option** | **Action** |
| --- | --- | --- |
| Is the inquiry genuine? | No | Stop process |
| Does the client have a charter intent? | No | Stop process |
| Has the client confirmed the itinerary? | No | Stop process |
| Has the operator provided a contract? | No | Re-negotiate terms |
| Has the client returned the signed agreement and made the payment? | No | Stop process |
| Are there any itinerary changes? | Yes | Notify sales, adjust arrangements |

This structured workflow serves as a detailed guide for regional sales operations, optimized for RAG extraction and intelligent system automation.