

YOUR DREAM TRIP

planned to perfection



Travel
CHARM

Hi there

These are the exact steps I take when planning travel for myself and my clients.

I even use them for weekends away, so I don't miss out on anything.

I have been planning travel for over seven years, and I wish I had this list when I first started. My first big trip took me three years to plan! Yikes!

Follow the steps, [click on the links](#) for bonuses and downloads.

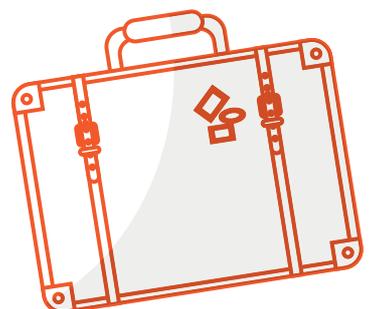
Most of all have fun planning your trip!

Happy Travels

Cindy x

Let's get started

Travel
CHARM



1. YOUR PREPARATION

BEFORE YOU START RESEARCHING AND GET OVERWHELMED, PREPARE SO YOU CAN BE METHODICAL IN YOUR PLANNING.

START YOUR PREPARATION BY ANSWERING THESE QUESTIONS. MAKE NOTES AND BE HONEST. THIS WILL GIVE YOU AN OVERALL VIEW OF THE TYPE OF TRIP YOU WANT TO PLAN. YOU CAN THEN BE MORE DECISIVE WITH THE INFORMATION YOU READ. THERE IS NO POINT READING OR TAKING NOTE OF A CUTE COTTAGE FOR TWO WHEN YOU ARE TRAVELLING WITH A FAMILY OF FIVE.

WHY ARE YOU TRAVELLING? Is it a holiday, business, to visit family, or another reason.

WHERE DO YOU WANT TO GO? One destination and day trips or multiple destinations. Local, overseas or a combination.

LENGTH OF TRIP? Is this time flexible or are your dates set? Are you allowing enough time to see everything? Be open to compromise.

and just a few more!



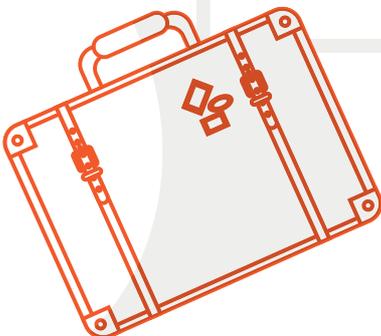
HOW MANY PEOPLE ARE TRAVELLING? Are you family, friends, strangers, club members? Travelling solo or as a couple is different than a group.



WHAT IS YOUR TRAVEL STYLE? What do you like and don't like? 5 Star, budget, camping, hostels, private apartments, full on luxury. Independent travel or resort style. List what you would NEVER do as well as what you like.



WHAT IS BUDGET? It's OK if you don't have it exactly worked out, but you will need to have a ballpark figure in mind to get you started. There is no point reading about penthouses when guesthouses would suit better. Or you may just want to know what your dream trip will cost.



2. ORGANISATION

BEFORE YOU START RESEARCHING, GET ORGANISED OTHERWISE YOU WILL HAVE INFORMATION EVERYWHERE!!

LISTED ARE TOOLS YOU WILL NEED. I USE THESE WHEN I PLAN MY TRAVEL OR MY CLIENT'S. THINGS CAN GET MESSY IF YOU DON'T START THE RIGHT WAY. YOU DON'T WANT TO LOSE VALUABLE INFORMATION BECAUSE IT WAS ON A SCRAP OF PAPER. GET EVERYTHING READY, BUY WHAT YOU NEED, SIGN UP FOR ACCOUNTS AND SET UP BOARDS AND TAGS. (I promise I will explain)

 **NOTEBOOK.** It can be as fancy or as cheap as you like. You will be scribbling notes, crossing out and adding stuff as you go along, and there will probably be very little order. Just organised chaos waiting to transform into your dream trip. A student exercise book is perfect for this job.

 **FOLDER OR RING BINDER.** The folder is for those of you who are super organised, love coloured tabs, post-it notes, plastic sleeves and tabs. Like me! Once you have made a few decisions and started to gather the information you can use your folder. This exercise is for people who enjoy using physical items opposed to online folders and apps. Personally, I like both. For those who believe in the power of visualisation, a folder is perfect.

 **TRAVEL PLANNERS.** I use Travel Planners that I designed years ago because I was sick of getting lost in all my notes. There is a Travel Organiser to record your accommodation, transport, flights and activities. A Budget Planner to keep track of your expenses and a Daily Schedule to organise your days while away, so you don't miss out on anything and over schedule. Once you have chosen your services and accommodation, you can enter the details on your planners and see where any adjustments need to be made eg. budget. Print out as many as you need until you get your trip right. You can download the [TRAVEL PLANNING PACK here](#).

there's still more ...

POCKET. Pocket is an online app where you can save articles. Do you ever scroll through Facebook and see an article you want to read but don't have time. You can save it to Pocket. It's FREE, and [you can sign up here](#). You can add an extension to your browser so if you are on your computer and find an article you like you can instantly save it to Pocket by clicking the icon. I use the app on my phone the most. You can create tags so you can easily find your articles. I have tags for Travel, Iceland, Scotland (and heaps more). But you can create tags for Destination, Accommodation, Activities and even COOL STUFF TO DO!

PINTEREST. My all-time favourite tool to use for travel planning is Pinterest. Not only do I have an account with boards full of interesting pins (which [you can follow if you like](#)), but I can search any topic of interested. Travel is huge on Pinterest. So you may know Pinterest for the awesome pictures and images, but most of those images (or pins) are linked to blog articles and websites. Create an account if you don't already have one, create a Travel board (or destination name eg Scotland) and start searching for Pins in your category. Pin (Save) the ones you would like to read later.

FACEBOOK GROUPS. Facebook has so many groups to chose from now. Personally, I belong to women's travel groups, blogging groups and travel destination groups. I even have one myself which I am building to help travellers plan their best travel experiences ever by sharing information, knowledge and recommendations. I have learnt so much from those groups and even if you don't want to interact they are an excellent source of information. I have saved information on accommodation, places to visit, ways to get around and travel hacking. They are very worthwhile. Search Facebook for groups of interest to join, or you can [join my free Facebook group here](#).



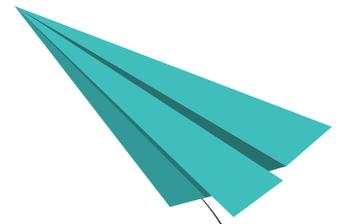
3. RESEARCH

PART 1 - START PLANNING YOUR TRIP - STEP BY STEP.

FOLLOW ALONG STEP BY STEP ON HOW TO PLAN YOUR TRIP. THIS CAN BE THE HARDEST PART, KNOWING WHERE TO START. FOLLOW MY STEPS AND AVOID GETTING LOST AND OVERWHELMED.

- 1. DECIDE.** Decide on your destination. I read a lot of travel articles, and I have found inspiration for new destinations from those. If you cannot decide, don't worry, keep reading, and eventually, when the time is right, a destination will spark your interest.
- 2. SAVE ARTICLES AND WEBSITES.** Whether I have googled "Top 10 Places to Visit in Europe" and found a stack of articles I like or Tourism websites that looks promising, I save them all to **Pocket**. Travel Planning is time-consuming. I save my information and read the information at a better time, like at night. I do the same with Pinterest. I allocate some time each day to look at **Pinterest**, pin any articles that look promising to my relevant boards and then read them.
- 3. READING.** When I am ready to read the articles or look over the websites, I use my **notebook**. Anything that interests me I write down. You can write down a heading, eg Edinburgh and then write everything about that place on the page. By doing this exercise, I start to get a "feel" for a place and if it's for me. I do this over and over until I have enough information. You can spend as much time or as little as you like. There is no rule for time frames only your agenda.

and more ...



4. FACEBOOK GROUPS. I regularly check in and scroll through my groups. You can change your settings to receive notifications if you prefer. I make notes in my **notebook** of interesting information that may come up in the threads; I read comments too because I have found valuable information there as well. Any shared articles I save to **Pocket**. You can search a topic in Facebook groups to avoid reading all the posts.

5. GUIDEBOOKS. I find they are very generic and for good reason. But I still have my Rough Guides book from my big European trip with notes and highlighter pen all through it and found it a useful resource. Again it's up to you and how much time you have and inspiration. You can do what I did and mark the book if you have it, or take notes in your **notebook** of useful information and references.

6. TRIPADVISOR. This used to be my first port of call. But no more. TripAdvisor can be confusing, and there is some doubt as to the honesty of some reviews. But I still like to check. If you decide to go down this path, I would suggest taking the time to read as many reviews as you can on whatever it is you are looking at, eg. hotel, tour etc. You should get an overall view, and feel, about it. And you can glean some useful information like someone sharing their favourite cafe nearby or a tour they took, or tips on getting around. It can be a good place to start when looking at what hotels are available in an area.

7. PERSONALISE. I have suggested the tools I like and use. There are other tools and apps like Dropbox, document folders and your bookmarks bar in your browser. Pick what works for you. I have tried many, and what I have recommended in this checklist works best for me. Tried and tested!

PART 2 - GETTING ORGANISED.

YOU HAVE MADE DECISIONS AND GATHERED INFORMATION. NOW WHAT?

-  **8. FOLDER.** Now organise your information into your folder. Get out your notebook and start to organise your information. You should know by now what you are interested in and what fits your budget. Create tabs for locations, activities, transport and anything else of relevance. I am not advocating wasting paper by printing, but you can if you want to - website pages, screenshots, your typed notes, articles. Organise your notes, type them out, take a photo and print or rewrite - however you want to do it, sort your information into a folder. Of course, this can be done online if you prefer. But I like to look through, make notes and even add images for inspiration.

-  **9. GOOGLE MAPS.** I have used Google Maps for years for Travel Planning. I use it to see if the locations (or day trips) I have chosen flow. To see how far apart they are. And I also use it to map out my Daily Schedule - find walking distances, public transport or driving times between venues. It is one of the most useful tools I use. To create a personalised map that you can save and share, click on the menu icon, select Your Places, Maps and then all the way down the bottom click on Create Map. And away you go.

-  **10. RECOMMENDATIONS.** When looking at accommodation in particular, I find three I am happy with - one I love, one I like and one that is OK. They usually vary in price. When putting the trip together you may find for whatever reason, or another, one will not fit, eg. date, location, length of stay, cost. It may be necessary to go through this step numerous times to find one that is suitable.

4. GETTING IT TOGETHER

WHAT TO DO WITH ALL THIS INFORMATION?
LET'S GET THINGS SORTED INTO A TRIP.

YOU HAVE FOUND A LOT OF INFORMATION. BUT IS IT ENOUGH? YOU HAVE YOUR FOLDER ORGANISED (IF NOT DO IT BEFORE YOU MOVE ON). BUT DO YOU HAVE ENOUGH OR IS IT THE RIGHT INFORMATION. LET'S TAKE A LOOK.

GET OUT YOUR FOLDER. Make sure you have all your information ready. And your **notebook** too just in case you want to refer back to something.

PRINT YOUR TRAVEL PLANNERS. You can download the [TRAVEL PLANNING PACK](#) [here](#).

ACCOMMODATION.

- Is your accommodation appropriate for the number of people travelling?
- Is it in the right location? Cheaper sometimes means out of the way.
- Are you happy with the price? Even if you are not sure, enter your choice in the Budget Planner and Travel Organiser. (Don't worry about budget too much at this stage)
- If you need to change, leave blank for now. Have you considered the alternatives? You can [read more here](#).

TRANSPORT. (NOT INCLUDING FLIGHTS)

You will need:

- Transfer from home to the airport.
- Transfer or transport from the airport to accommodation.
- Do you need to organise a transport pass? e.g. Metro pass or subway pass?
- Transfer from the airport to home upon your return.
- Enter information into Travel Organiser and Budget Planner.

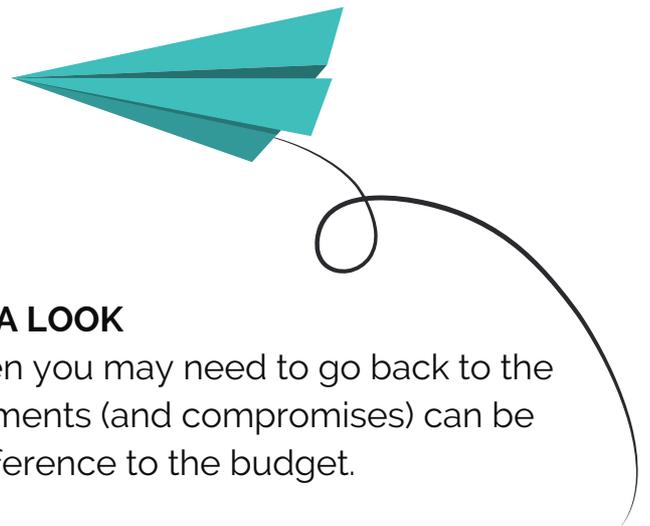
keep going, you've got this

ACTIVITIES

- a. Tours (include free and paid)
- b. Day Trips - sightseeing expenses, eg museums, parking fees, tours etc.
- c. Entry fees to museums, galleries, experiences etc.
- d. Include all free activities on Travel Organiser.
- e. Enter all your information into the Travel Organiser and Budget Planner.

BUDGET

- a. Complete the Budget Planner.
- b. Use a Currency Converter for foreign currency.
- c. Add it up.
- d. DON'T FREAK OUT!



LET'S TAKE A LOOK

If your budget is completely blown, then you may need to go back to the drawing board, but most times adjustments (and compromises) can be made and make a huge difference to the budget.

The advantage you have is that you are planning your trip yourself, and that means a lot of choices.

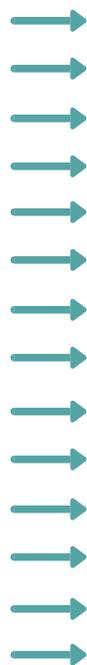
Read on and see if you can apply some of these cost saving alternatives to your trip. You can also read [Clever Money Saving Ideas](#).

Money Saving Ideas

There are many ways to save money travelling. See of these ideas work for you.

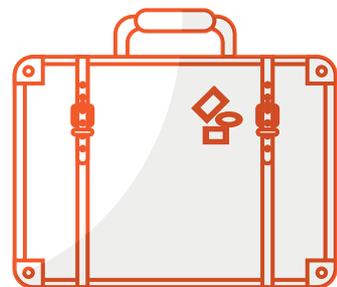
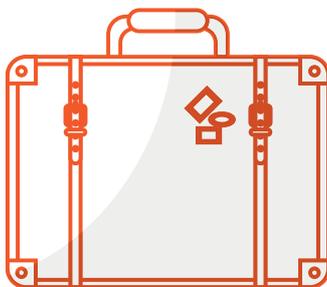
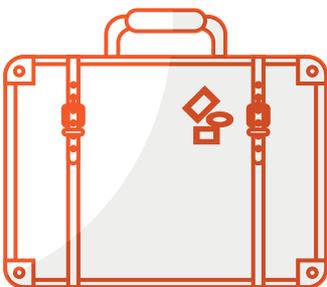
SERVICE

Private transfer
5-star hotel
Paid Tour
Hop on, Hop off Bus
Eating out every meal
Using Laundry service
Direct Flights
Car Hire (over 21 days)
Expensive location - eg Santorini
Hotel
Private Tours for day trips
Several locations on Itinerary
Purchasing tickets on the go
Staying in Tourist places



ALTERNATE COST SAVER

Public transport (train, bus, shuttle)
Decent budget hotel
Free Walking Tour or self-guided tour
Weekly Metro (or similar) pass
Apartment with kitchen (self-catering)
Apartment with a laundry
Indirect flights and stopovers can be cheaper
Car Leasing (certain countries only)
Cheaper location - e.g. Paros or Naxos
Guesthouse, cabin, camping, glamping, hostel
Use Public Transport and a map
One location - more day trips
Prebook activities online
Stay in neighbourhoods



and maybe it's better to wait than compromise

Sometimes compromising is not an option. What those things are will be different for everyone.

Here is an example:

Find three choices of accommodation - one you love, one you like, and one that is ok. If none of that suite your budget then do not pick something you will hate. It will spoil your trip.

Only you know whether the experience of the trip outweighs the accommodation (or whatever else you are compromising).

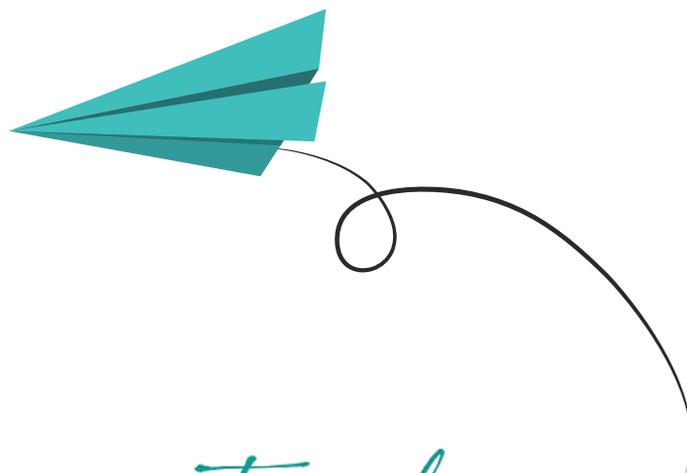
You may need to ask yourself "If the only way you can afford to go on a trip is to stay in a hostel, would it be worth it??"

Flights and accommodation are going to be your largest expenses. You can learn about [Travel Hacking](#) (I'm still learning), and you can compromise on accommodation.

You have a choice - wait until you can afford it (and your itinerary will be ready and waiting) or choose a cheaper destination. Asia is always going to be cheaper than Europe.

You always have choices.

If you are ready to move on keep reading...



5. YOUR ITINERARY

IT'S NOT ENOUGH TO DECIDE ON WHERE YOU ARE GOING, NOW YOU NEED TO MAKE SURE IT WORKS.



PUTTING YOUR TRIP TOGETHER CAN BE JUST AS OVERWHELMING AS DECIDING WHERE TO GO AND WHAT TO DO. HOW ARE YOU GETTING FROM ONE LOCATION TO THE NEXT? DO YOU HAVE ENOUGH TIME? YOUR ITINERARY NEEDS TO FLOW.



OPEN GOOGLE MAPS. This is an essential tool to help you make your itinerary flow.



Start by adding in all your locations (where you will stay). For example on a Scotland Road Trip - Edinburgh, Inverness and Portree. Does it flow? Are you backtracking? Are they too far away from each other to drive to in a day (or train/bus etc)



Enter the towns and villages you want to visit, eg Culloden, Loch Ness etc. Choose the ones you will see along the way as you drive (allowing time for each stop). If they don't fit, can they be day trips from the locations you are staying?



At this stage don't worry about how much time you have on your trip. I recommend creating the dream itinerary and reviewing it at the end. If you need to cull sections, you could use that as an itinerary for another visit, or decide to extend this one. Don't be tempted to cram too much into your itinerary.



Now use Google Maps and your Daily Schedule together. And you may need to google information at times as well.

you can do this ...

USE THE DAILY SCHEDULE. This was included in your Travel Planning Pack. Print as many sheets as you think you will need.

Decide if you have enough time for everything. Enter approximate arrival times (flight, train etc) at the start and end of the trip.

Include travel time required to travel to and from the airport, station etc.

Add check-in times and check out times.

Enter locations you will be staying including arrival and departure times.

Enter travelling time (eg. time to drive from Inverness to Portree or train travel)

Enter any place of interest you want to see along the way (check opening times and consider the length of time to spend there).

Adjust travel time around stops. Is it possible?

Decide if any locations that do not fit into your travel time can be included in your schedule as a day trip. Enter details and approximate times. The actual day can be changed later.

Enter any activity you will be doing in each location (eg hikes, pre-booked tours, restaurant reservations etc) and start time (block out duration).

Enter time between activities and how long it will take to get to each one. Google Maps can tell you how long it takes to walk, take public transport and drive between places. Don't be rushed.

Don't give up!

You should now have a clear idea of what will work and what won't. It can get frustrating at this point. Don't give up. If you need to set aside for a few days and then take another look!

Keep playing with your Daily Schedule until you are happy with it. Remember you cannot do everything AND don't make the mistake of cramming too much into one day. You will only remember the stress of rushing around and not the actual experience itself.

You don't have to have the Daily Schedule fully complete at this stage, That can be done later, but at least have all the other components in place.

What now?

Is everything included in your trip? Activities, locations, events etc.

If not, go ahead and include it. If it doesn't fit, can you take it out or make adjustments? Can you extend your stay?

Note things that need to be paid in advance or paid later.

This will help you keep on top of your spending prior to and during your trip.

Are you over budget?

If yes, research cheaper alternatives. Can you let go of something eg tour, one location, extra days?

Does your itinerary/daily schedule flow?

If no, what can you change around? Can you create a day trip instead? Can you eliminate something? Remember don't waste precious time and money backtracking. Perhaps create a MUST-SEE list and rework your trip around that.

Have you allowed enough time?

Time for activities, travel time between locations and activities and stops? What about downtime? Travelling is exhausting, and you should factor in time to relax.



Just go with the flow

Even though you have planned your trip doesn't mean that you cannot be flexible. Don't be so rigid with your plans you miss the spontaneity of travel. You will only remember rushing from place to place and not the experience itself.

Build spare time into your day, even if you move at a fast pace you want to have some breathing space. You will always find something you didn't know about to fill your time.

Planning builds confidence. Once you are there and discover other things that may interest you more, you can move activities around.

Having a plan, even a loose one, helps you structure your trip so that you don't waste precious holiday time and it ensures that anything you **MUST DO** will not be left out.

Not everything is available or open all the time. Planning means you are on top of it, and then allows you the flexibility to fill in the gaps or rearrange things on the go.

The best plan is a flexible plan.

Booking your trip

Now you have your itinerary the way you want it and you are ready to book your trip, you need to decide if you are going to book your entire trip yourself, or in part or hand it over fully to a Travel Agent. Here are the steps you need to take:



BOOKING YOURSELF

1. Book each component in order of importance. If cheap flights are your priority, book those first. If you are travelling to see a particular event or participate in an activity that is only on at a certain time, then you will need to book activity, accommodation and travel together.
2. The same goes for any busy time of the year for your chosen destination. It can get a little harrowing, but you will get there.
3. Remember, there is no point booking a tour (e.g. to the Lavender Fields in Provence) if you cannot guarantee accommodation.
4. Next book transport, once you have your locations and accommodation secured.
5. If you are flexible with times, you should have no problem.
6. Be aware of extra taxes that you may need to pay at check out, eg. City Tax.
7. Book transfers last.
8. Be flexible; it is much easier to create an itinerary if you make adjustments as you need to. It will be a fantastic trip no matter what you do, and small changes will not affect that in the end.
9. Don't forget to organise Travel Insurance. I wouldn't travel without it.
10. It can be scary booking online. If you are nervous, email the company first. From my experience, a lot accept an online booking and payment at time of attendance. Make sure you know whether they accept credit card or cash.

and last but not least ...



USING A TRAVEL AGENT.

1. Take your itinerary to a Travel Agent.
2. Let your Travel Agent know the most important factors about your trip, eg. a specific hotel you have chosen, a tour you want to take.
3. If you are flexible, by all means, see what else your travel agent offers (but check it out yourself online). They may be able to offer similar accommodation. Check that the location of the accommodation is suitable, check reviews and amenities.
4. If you have chosen a particular place/activity for a reason, then stick to your guns. Explain your reasons. They may be able to offer a choice you might prefer.
5. Be clear on your budget (you will already know what you would be paying if you booked it) that is the benefit of researching yourself.
6. Quoted flights may not always be the cheapest available. There may be other airlines. Ask for more if you want to compare.
7. Be aware that Travel Agents are not able to book private apartments, privately owned boutique hotels, Airbnb accommodation or anything similar. You will need to do this yourself, and from my experience, these options can save you a lot of money.

You can do this. Even though it may seem difficult at first it will get easier. You will get so much satisfaction from planning your own trip you will never again leave it in the hands of others. Have fun, be patient and take your time.

ENJOY YOUR TRIP!