

How to win and run corporate chauffeur accounts that keep rebooking.

Use a familiar job. Mark what you have checked, note the gaps and agree the next step with your team.

1. Know what corporate travel bookers expect.

- ☐ Reply with a confirmed price, vehicle and time on the same day.
- ☐ Keep insurance and licence documents ready to send.
- ☐ Ask who books, who travels and who pays at the first contact.

2. Set up the account before the first booking.

- ☐ Collect billing contact, terms and reference rules in writing.
- ☐ Record the agreed discount and credit limit on the client.
- ☐ Agree the rate schedule before the first job.

3. Handle several bookers and passengers on one account.

- ☐ List the named people who may request journeys.
- ☐ Record passenger name, phone and flight for every job.
- ☐ Invite portal users individually and remove them when they leave.

4. Agree references and approvals up front.

- ☐ Ask at setup whether a reference is mandatory.
- ☐ Store the reference on the request, not in an inbox.
- ☐ Note who approves trips above the client's usual spend.

5. Let clients request rides through a client portal.

- ☐ Offer the portal to every account that books regularly.
- ☐ Treat each ride request as an enquiry to quote, not a confirmed job.
- ☐ Review change and cancellation requests the same day.

6. Bill once a month and keep service consistent.

- ☐ Agree the monthly invoice layout with their finance team.
- ☐ Record driver, vehicle and pickup preferences on the client.
- ☐ Review each account's jobs and balance every quarter.

Our next step / owner / date

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