



Tour Operator's SOP To Prevent and Manage Cancellations

Checklist

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The COAX team prepared a comprehensive SOP checklist template that your team can use daily. Save this checklist and train your staff on proactive cancellation prevention, handling all types of tour cancellations, refund processing, and service recovery with a structured, step-by-step methodology. The checklist contains the ultimate objectives, "who does what" instructions, preventive actions, and decision matrices for each scenario.

CANCELLATION PREVENTION & REFUND MANAGEMENT SOP

Goal: Reduce overall cancellation rate to **under 8%** through proactive communication and friction reduction; Prevent **70%+** of avoidable cancellations through early intervention; Process all unavoidable cancellations within **4 hours** and refunds within **24 hours**; Maintain **95%+** customer satisfaction during cancellation events; Achieve **85%+** rebooking rate for cancelled tours across all cancellation types.





STAGE 1:

PROACTIVE CANCELLATION PREVENTION

(At booking + 7 days before tour)

Who: Customer service team, booking system automation, operations coordinator

Objective: Eliminate booking errors, set clear expectations, and identify high-risk cancellations before they occur

ACTIONS AT BOOKING (T-0):

- Confirm date, time, meeting point, and guest count with the customer before finalizing payment
- Send immediate confirmation with a meeting point photo, guide photo, weather expectations, and "what to bring" checklist in the confirmation email (within 2 minutes of booking)
- Flag high-risk bookings with: multiple tour times on the same day, tours booked <24 hours in advance, first-time customers, groups of 6+, bookings made late at night (possible timezone confusion)
- Add a mandatory checkbox: "I confirm the tour date is [Date] at [Time] in [City/Timezone]" to prevent date/time errors
- Ask optional question at booking: "Is this tour weather-dependent for you?" (Yes = send extra weather updates / No = proceed as normal)
- Capture phone number (required), WhatsApp availability, and preferred contact method for urgent updates
- Confirmation email includes: "This tour operates rain or shine with indoor backup options. Cancellations must be made 48+ hours in advance for a full refund."

SLA target: Confirmation sent within **2 minutes** of booking; High-risk bookings flagged and reviewed within **4 hours** of booking

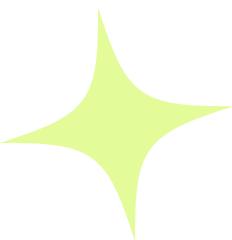


ACTIONS 7 DAYS BEFORE TOUR (T-7 DAYS):

Who: Customer success team or automated CRM system

- Send a "week before" engagement email with booking details, tour highlights, and include a prominent "Need to reschedule? Click here" button with a zero-friction rebooking link
- Proactively offer flexible rescheduling: "Plans change. If you need to move your tour to another date, you can reschedule at no cost up to 48 hours before your tour time."
- Flag any customers who haven't opened confirmation emails or clicked any links. Send SMS follow-up: "Hi [Name], confirming your [Tour Name] on [Date] at [Time]. Reply YES to confirm or CHANGE to reschedule."
- Contact any customers who booked conflicting tour times, wrong cities, or implausible itineraries
- If the extended weather forecast shows challenging conditions 7 days out, send a proactive update: "Weather forecast shows possible [condition] on your tour date. We have indoor backup plans ready, but if you'd prefer to reschedule now, click here for available dates."

SLA target: Week-before email sent exactly **7 days prior**; Unresponsive customers flagged and contacted within **24 hours**; Booking errors identified and resolved within **48 hours**





STAGE 2:

PRE-TOUR RISK MONITORING & INTERVENTION (48-24 hours before tour)

Who: Operations manager, customer service lead

Objective: Identify and prevent last-minute cancellations through early communication and issue resolution

ACTIONS 48 HOURS BEFORE TOUR (T-48 HOURS):

- Review all bookings for the next 48 hours. Check for: incomplete contact information, customers who haven't responded to any emails, first-time international customers (possible timezone confusion), and group bookings without lead contact confirmation.
- Send proactive confirmation request via SMS -
"Hi [Name], your [Tour Name] is in 2 days on [Date] at [Time].
Reply READY to confirm or HELP if you have questions."
- Any customer who doesn't respond to the SMS within 12 hours should receive a personal phone call to confirm attendance and answer any questions
- Monitor external factors. Check for: public holidays, transportation strikes, major local events that might impact attendance, severe weather forecasts, and travel advisories for your city
- If external factors are identified, send an email 48 hours before:
"We're aware of [situation]. Your tour will proceed as planned. Here's what to expect: [specific details]. Need to reschedule? Click [here](#)."
- For high-risk cancellations (identified by lack of engagement), include:
"We're looking forward to seeing you! Here's a complimentary [upgrade/add-on] included with your tour."

SLA target: 48-hour review completed by **9 AM** daily; SMS confirmations sent by **10 AM**; Non-responders contacted by phone within **24 hours**





ACTIONS 24 HOURS BEFORE TOUR (T-24 HOURS):

- Send a reminder that includes: meeting point photo, guide photo and name, tap-to-navigate link, weather forecast, "what to bring" list, and emergency contact number boldly displayed
- Review forecast and apply objective thresholds (see weather decision matrix below). If conditions are borderline, send proactive communication: "Tomorrow's weather: [details]. Your tour will proceed with [indoor backup plan / modified route/gear provided]. Still excited to join us?"
- Call group booking lead directly to confirm final headcount: "Hi [Name], confirming [X] guests for tomorrow at [Time]. Any changes to your group size?"
- Prepare for potential no-shows. For bookings with red flags (no email opens, no SMS responses, booked late at night, first-time customer), set guide expectation: "Possible no-show risk. Attempt phone contact at meeting time if they don't arrive."

SLA target: 24-hour reminder sent by **6 PM** local time (evening before tour); Group confirmations completed by **8 PM**; Weather assessments completed and communicated **18-24 hours** before tour start



STAGE 3:

FINAL COMMUNICATION & NO-SHOW PREVENTION (3 hours to 30 minutes before tour)

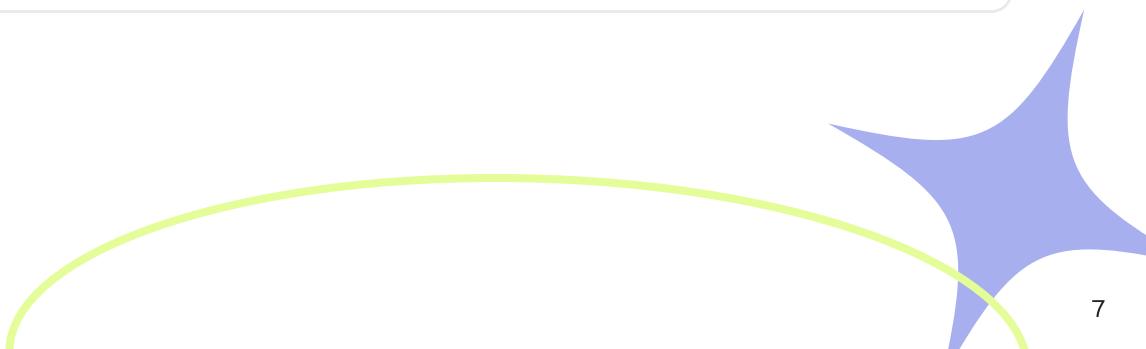
Who: Operations team, tour guide, automated messaging system

Objective: Ensure 100% of confirmed guests know where to go and have zero friction to communicate if they're running late or need help

ACTIONS 3 HOURS BEFORE TOUR (T-3 HOURS):

- Send final logistics reminder via SMS. "Hi [Name]! Your [Tour Name] starts in 3 hours at [Time]. Meet at [Location] - tap here to navigate: [link]. Your guide [Name] will be wearing [description]. Questions? Call [number]."
- Send a WhatsApp message with: location pin (not just link), photo of meeting point, photo of guide holding company sign
- Enable "I'm running late" quick-reply - SMS includes: "Running late? Reply LATE, and we'll wait for you" with an automated response system
- Monitor for customers who clicked cancellation links in the 24-hour email. Call immediately: "Hi [Name], we noticed you were looking at cancellation options. Is everything okay? We can help you reschedule at no cost if plans changed."
- If conditions have worsened since 24-hour communication, send an update: "Weather update: [current conditions]. Your tour is [proceeding as planned/moving to indoor backup location at [address] / cancelled - see options below]."

SLA target: 3-hour SMS sent exactly 3 hours before start time; Cancellation inquiries responded to within 15 minutes

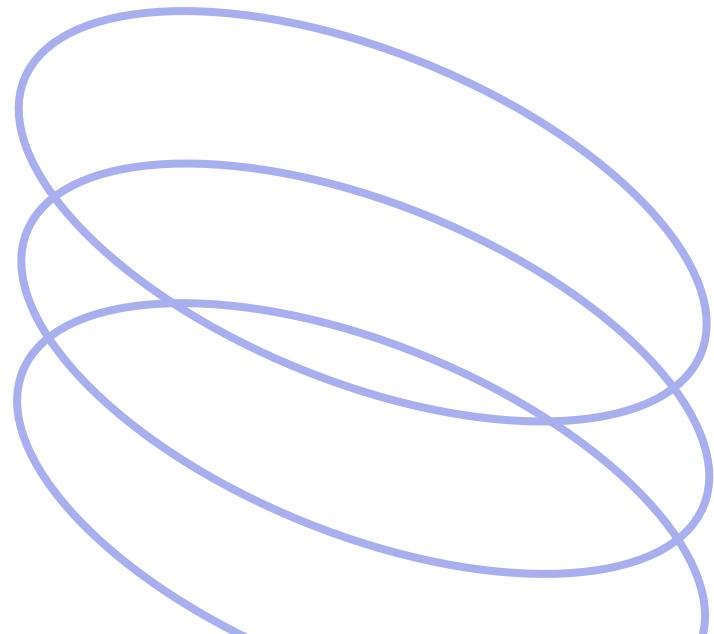




ACTIONS 30 MINUTES BEFORE TOUR (T-30 MINUTES):

- Send final "leaving soon?" reminder SMS:
 "Your tour starts in 30 minutes! Heading out? Tap to navigate: [link].
Look for [Guide Name] in [clothing description]. Running late? Call now: [direct guide phone]."
- Guide arrives 30 minutes early, takes photo of setup, sends to operations: "In position at [location]. Ready for [X] guests."
- Operations team checks if any customers haven't opened 3-hour or 30-minute messages. Send one final outreach: "Hi [Name], just checking in - your tour starts in 20 minutes at [location]. Are you on your way? Call us: [number]."
- For customers who haven't responded to any messages, guide attempts phone call at T-10 minutes and T-5 minutes.

SLA target: 30-minute reminder sent exactly **30 minutes** before start; Guide in position **30 minutes** early; No-show outreach calls made at **T-10** and **T-5** if no response





STAGE 4: **POST-TOUR FOLLOW-UP** **(Within 24 hours)**

Who: Customer success team + operations manager

Actions:

- Send post-tour thank-you email
- Include a feedback survey with a specific question about the experience
- Review any complaints or negative feedback
- If multiple customers complained: offer an apology + a discount code for future booking

SLA target: Follow-up email sent within **24 hours** of tour completion



ESCALATION PROCESS

If customers arrive at the wrong location despite notifications:

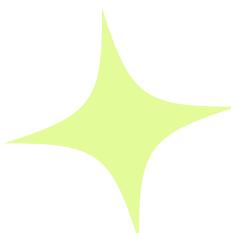
- Guide or support staff contacts the customer immediately by phone
- Provide clear walking/transit directions to the backup location
- Hold tour start time for up to 10 minutes if multiple customers are en route
- Log incident as "communication failure" for system review
- Offer affected customers a complimentary upgrade or a future discount

If the backup location is unexpectedly unavailable:

- Activate secondary backup location immediately
- Send emergency notification via SMS to all customers
- Operations manager contacts customers individually by phone if less than 30 minutes to the start time
- Escalate to senior management for resolution
- Document the incident for venue relationship review

If the weather worsens during the tour:

- Guide makes real-time decisions to shorten outdoor portions or move indoors
- Guide communicates clearly about adjusted route and timing
- Operations team notified immediately for potential future tour adjustments

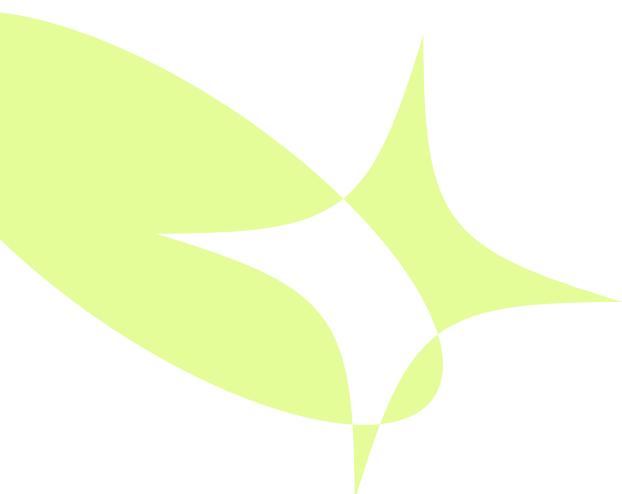
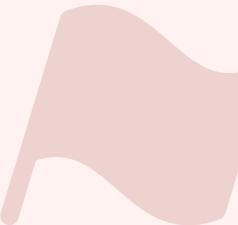


METRICS TO TRACK DAILY

Metric	Target
% of tours relocated to backup locations	Track trend
% of customers who arrived at the wrong location despite notifications	<2%
Average customer satisfaction score on weather-disrupted tours	4.5/5 or higher
% of weather-related complaints	<3%
Response time from weather decision to customer notification	<2 hours

Red flags:

- 红旗 More than 5% of customers arrive at the wrong location
- 红旗 Weather-related complaints exceeded 5% of tour participants
- 红旗 Any tour starting more than 15 minutes late due to weather confusion
- 红旗 Backup location notifications are sent less than 1 hour before the tour start
- 红旗 Repeated use of the same backup location without customer feedback review



CANCELLATION DECISION MATRIX & COMMUNICATION PROTOCOLS

Who: Operations lead, customer service team

Objective: Apply consistent, objective criteria for operator-initiated cancellations and provide clear, empathetic communication for customer-initiated cancellations

OPERATOR-INITIATED CANCELLATIONS - WEATHER THRESHOLDS:

Decision Matrix - Temperature ranges:

Condition	Decision
Walking tours	Cancel if temperature $>38^{\circ}\text{C}$ (100°F) or $<-10^{\circ}\text{C}$ (14°F)
Bike tours	Cancel if temperature $>35^{\circ}\text{C}$ (95°F) or $<-5^{\circ}\text{C}$ (23°F)
Water-based tours	Cancel if water temperature $<15^{\circ}\text{C}$ (59°F) without wetsuits

Decision Matrix - Precipitation Rates:

Condition	Decision
Light rain ($<2 \text{ mm/hour}$)	Tour proceeds as planned → Offer optional ponchos
Moderate rain ($2-5 \text{ mm/hour}$)	Tour proceeds → Activate backup indoor meeting location + ponchos mandatory
Heavy rain ($>5 \text{ mm/hour}$)	Tour cancelled or modified to an indoor-only route → Full refund or reschedule offered

OPERATOR-INITIATED CANCELLATIONS - WEATHER THRESHOLDS:

Decision matrix - Wind speed:

Condition	Decision
Walking tours	Cancel if sustained wind speed >50 km/h (31 mph)
Bike tours	Cancel if sustained wind speed >40 km/h (25 mph)
Boat tours	Cancel if wind speed >30 km/h (19 mph) or waves >1 meter

Decision matrix - Visibility:

Condition	Decision
Scenic tours	Cancel if visibility <500 meters (fog/smog)
Photography tours	Cancel if visibility <1 km
Historical tours	Proceed unless unsafe to walk (visibility secondary concern)

Decision matrix - Air quality (AQI):

Condition	Decision
0-100	Tour proceeds as planned
101-150	Tour proceeds with caution → Send health advisory 3 hours before tour (include vehicle-based tours)
>151	Tour cancelled → Full refund or reschedule offered

SLA target: Final decision made and customer notification sent a minimum of **3 hours** before the tour start time



OPERATOR-INITIATED CANCELLATIONS - OTHER FACTORS:

Minimum group size not met:

Decision point	Communication
24 hours before tour	"We're sorry, but your [Tour Name] hasn't reached our minimum group size of [X] guests. You can: (1) Full refund within 24 hours, (2) Reschedule to any date at no cost, (3) Switch to our [Alternative Tour] running the same day with [Y] guests confirmed."

Guide illness or emergency:

Decision point	Communication
As soon as known, minimum 4 hours before tour	"Due to an unexpected guide emergency, we need to reschedule your tour. We sincerely apologize. You can: (1) Move to [same tour tomorrow/day after] with priority booking, (2) Switch to [alternative tour] today with 20% discount, (3) Full refund processed within 12 hours."

Force majeure (strikes, public safety, natural disasters):

Decision point	Communication
Immediate	"Due to [specific situation] beyond our control, your tour is cancelled for safety. A full refund will be processed within 24 hours. We'll also provide a 25% discount code for when you're able to visit us again."



OPERATOR-INITIATED CANCELLATIONS - OTHER FACTORS:

Cancellation 7+ days before tour:

Action	Communication
Full refund processed automatically within 24 hours	"Cancellation is confirmed. Full refund of [amount] will come within 3-5 business days. We'd love to have you back - here's 10% off your next booking: [code]."

Cancellation 48 hours to 7 days before tour:

Action	Communication
Offer reschedule (free) or 75% refund	"We see a cancellation request. You can reschedule to an available date at no cost, or get a 75% refund. Reply RESCHEDULE or REFUND."

Cancellation 24-48 hours before tour:

Action	Communication
Offer reschedule (free) or 50% refund	"Plans change. Reschedule at no cost or get a 50% refund. We'd love to set you on another date. Reply RESCHEDULE or REFUND."

Cancellation <24 hours before tour:

Action	Communication
Offer reschedule (one-time, within 30 days) or 25% refund	"We see your last-minute cancellation. Our policy allows a one-time reschedule within 30 days free, or a 25% refund for late notice. Reply RESCHEDULE or REFUND."

No-show (customer doesn't arrive):

Action	Communication (sent 30 minutes after tour starts)
No refund per policy	"We missed you at [Tour Name]. We held your spot until [time] but couldn't reach you. No-shows aren't refundable, but you can get a 30% credit for your next tour. Interested? Reply YES."

EXCEPTION HANDLING - WHEN TO OVERRIDE POLICY:

Grant a full refund regardless of timing if:

- Customer is a repeat guest with a good history (3+ past tours)
- Cancellation is due to operator error (wrong information provided, booking system glitch)

Process: Manager approval required. Document the reason in CRM. Send: "We've reviewed your situation and will process a full refund as an exception to our standard policy. This will be completed within 24 hours. We hope to see you again when circumstances allow."

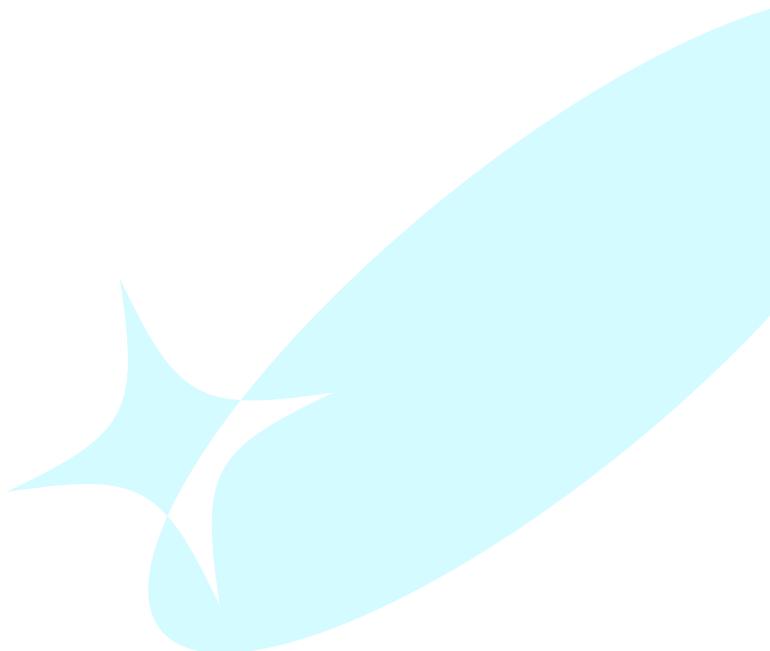


BACKUP LOCATION PREP CHECKLIST

For each tour route, document:

- Primary backup location name and full address
- Secondary backup location (in case primary is unavailable)
- Three photos: wide shot of entrance, ground-level landmark, guide holding sign
- Specific meeting spot description (e.g., "lobby level, left of main entrance, near café")
- Venue contact information (if permission/coordination needed)
- Walking time from the original outdoor meeting point
- Accessibility notes (wheelchair access, restroom locations, seating available)
- Save all information in a centralized tour operations system with easy guide access

SLA target: All backup locations documented with **photos** before tour season begins; reviewed **quarterly**



WEATHER MONITORING TIMELINE

T-12 HOURS

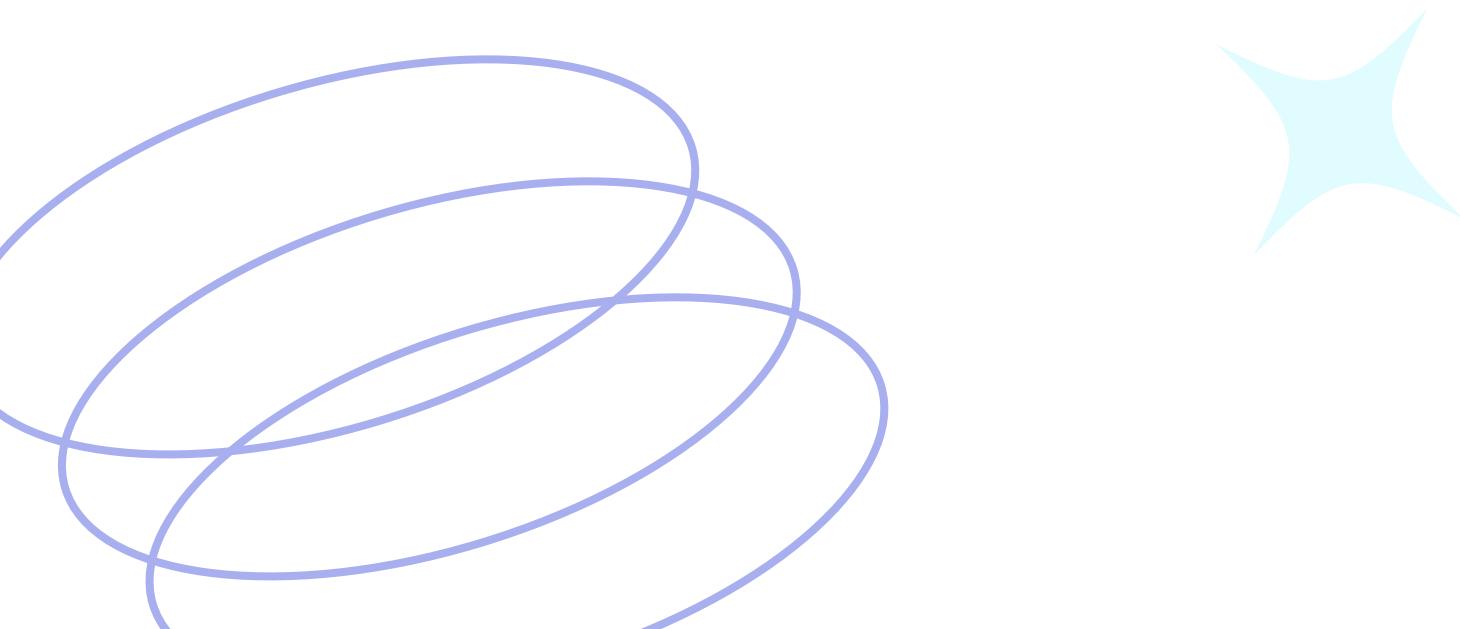
(Night before tour)

Who: Operations manager or automated weather monitoring system

Actions:

- Check the weather forecast for all tour times the following day
- Compare forecast conditions against objective go/no-go thresholds
- If conditions clearly violate thresholds, make a preliminary cancellation decision
- Send "Tour Status Update" email to all customers: "Weather forecasts predict [specific condition]. We are monitoring closely and will confirm final status by [specific time, e.g., 6 AM]."

Benefit: Customers can adjust plans (e.g., **skip early alarm**) before committing to tour preparation



WEATHER MONITORING TIMELINE

T-3 HOURS

(Final decision point)

Who: Tour operations lead

Actions:

- Check current weather conditions and short-term forecast
- Apply objective thresholds to make a definitive go/no-go decision
- Send final status via SMS and WhatsApp to all customers

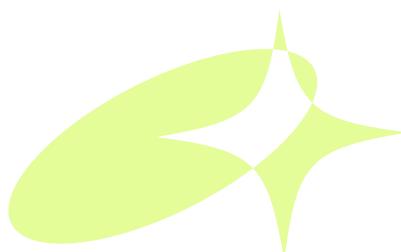
If the tour proceeds:

"Your [Tour Name] is confirmed for [time]. Current conditions: [temperature, precipitation]. Dress for [specific weather]. Meeting at [location]. See you soon!"

If the tour is cancelled:

"Your [Tour Name] is cancelled due to [specific weather condition exceeding safety threshold]. You will receive a full refund within 7 days OR reschedule at no cost. Reply RESCHEDULE or REFUND."

- Update all booking platforms and the website with the current tour status
- Brief guide on any route modifications or customer concerns to address



WEATHER MONITORING TIMELINE

T-30 MINUTES

(Emergency cancellation protocol)

Who: Tour operations lead + tour guide

Actions (if conditions deteriorate rapidly after 3-hour confirmation):

- Make an immediate safety-based cancellation decision
- Send emergency SMS to all customers: "Due to sudden [weather event], your tour is cancelled for safety. Full refund + 20% credit toward next booking. We apologize for the late notice."
- Contact customers individually by phone if they don't respond to SMS
- Guide positioned at the meeting location to inform any customers who arrive despite the notification
- Escalate to senior management for immediate refund processing

Compensation for late cancellation: Full refund + 20% future booking credit (automatic, no request needed)