USAEV Evaluation and Assessment Standard

Calibration instruments, compliance gates, and capstone certification rules for Academy Instructors and Quality Assurance Evaluators.



Gemini Notebook

KNOWLEDGE
(THE BASELINE)

Tool: Daily Quizzes & Foundational Exams



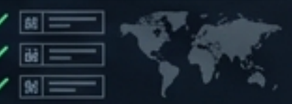
85% BASELINE

Mechanism: Automated, multiple-choice, and scenario-based scoring.



SCORE: 92/100

Target: Fact retention, supplier mechanics, and basic geography.



PASSING THRESHOLD: CLEAR

APPLICATION
(THE CRAFT)

Toal: Practical Rubrics (0-3 Scale)



ACHIEVED: 2.8/3.0

Mechanism: Human-scored evaluator matrices.



RATING: STRONG

Target: Itinerary engineering, quote accuracy, CRM hygiene, and discovery conversation skills.



CAPSTONE CLEARANCE: ACHIEVED

CALIBRATED PROGRESSION >>>

DEFENSE
(THE PRESSURE TEST)

Tool: The Capstone & Compliance Gates



PRESSURE TEST: PASS

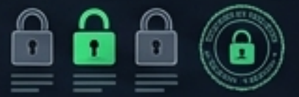
Mechanism: Dynamic, live simulation with injected disruptions.



DISRUPTION: HANDLED

COMPLIANCE: VALIDATED

Target: Synthesis, adaptability, service recovery, and strict legal compliance.



STATUS: STRONG RATING

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The Certification Threshold Dashboard



Foundations Exam (End of Day 5)

Covers Days 1-5 business model, product categories, geography, and economics.



CRM Practical

Requires correct lifecycle usage, mandatory fields, notes, and task attribution.



Compliance Exam

90% Overall Minimum with 100% Critical Compliance.



Final Capstone

Requires 85% overall rubric score + Supervisor Signoff.

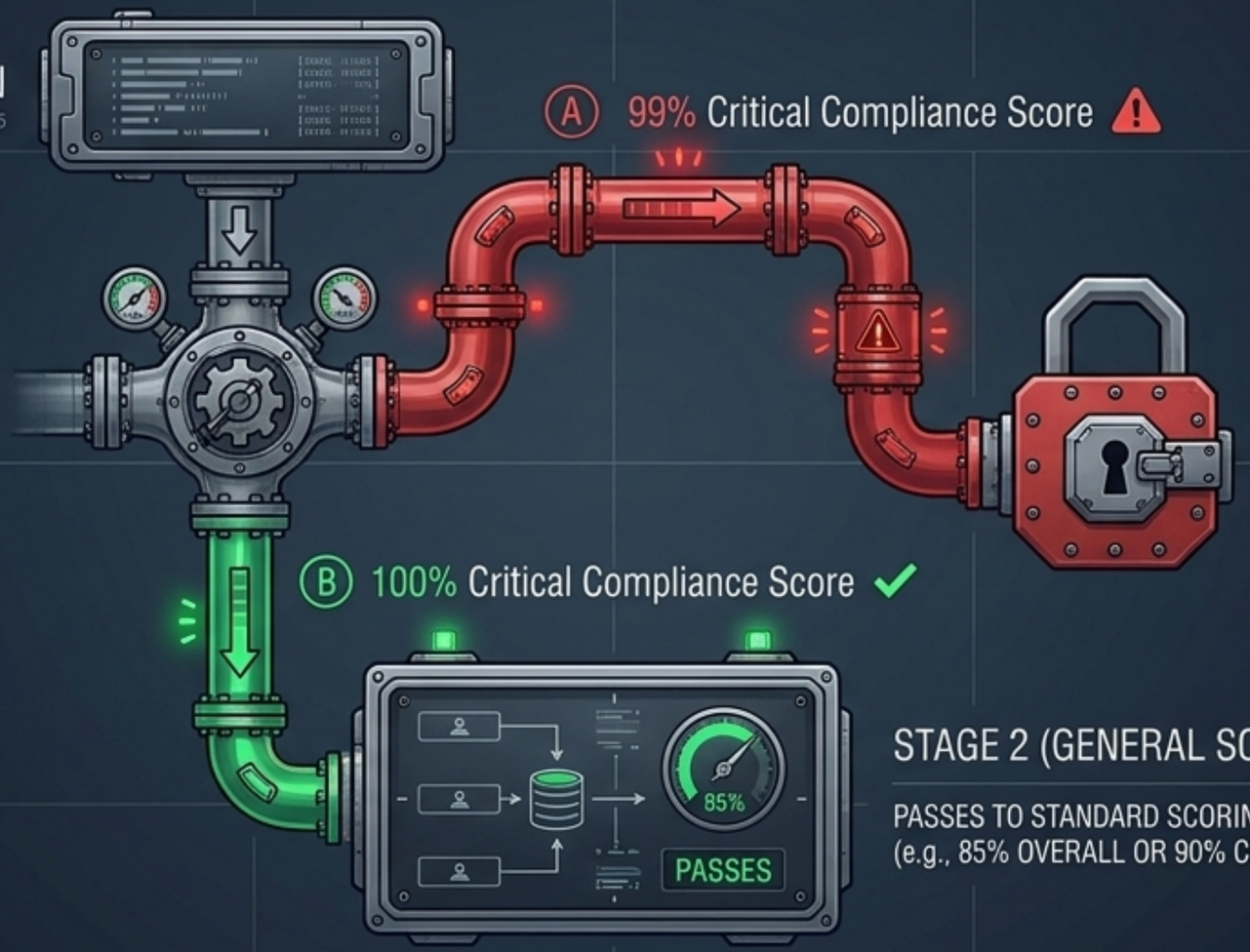
Side Note: Daily diagnostic quizzes consist of 10-20 questions used for pacing and remediation, rather than hard gates.

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THE COMPLIANCE SIEVE AND REMEDIATION LOOP

INPUT: STUDENT SUBMISSION

10248.5.001 13123 PMK // 175.83 PM // 2024.18.25



THE REMEDIATION LOOP

An 85% overall score paired with a 99% critical compliance score equals an automatic pause. Progression stops until targeted remediation is complete.

STAGE 2 (GENERAL SCORING)

PASSES TO STANDARD SCORING THRESHOLD (e.g., 85% OVERALL OR 90% CRM).

KEY TAKEAWAY: HIGH TECHNICAL COMPETENCY NEVER OFFSETS COMPLIANCE RISK. MEASUREMENT OF RISK IS ABSOLUTE.

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INPUT DATA
0

INPUT DATA
1.33.37.4.31
0.08. 8.82.1

THE SEVEN ABSOLUTE COMPLIANCE GATES

1. STATE VERIFICATION

Failed to verify state-specific seller-of-travel requirements before authorizing selling activity.

2. MISREPRESENTATION

Represented internal USAEV certification as a government license, state registration, or third-party accreditation.

3. PAYMENT SECURITY

Failed to use approved payment handling methods or collected unauthorized sensitive data.

4. CREDENTIAL EXPOSURE

Exposed internal supplier passwords, portals, or restricted credentials in training or public outputs.

5. CANCELLATION RIGHTS

Stated cancellation or refund rights that exceed or contradict verified supplier terms.

6. INSURANCE SCOPE

Sold or explained travel protection/insurance beyond the authorized scope and approved materials.

7. MATERIAL DOCUMENTATION

Failed to document material client decisions, deadlines, or required disclosures in the CRM.

SLIDE ID: 006-COMPLIANCE-GATES // DATE: 2824.10.25 // STATUS: CALIBRATED

SLIDE ID: 006-COMPLIANCE-GATES // DATE: 2024.10.25

INPUT DATA
A: 0.79206
B: 0.83689
C: 0.81997
D: 0.83801

INPUT DATA
74%
15%
38%
25%

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THE SI BOUNDARY MAP

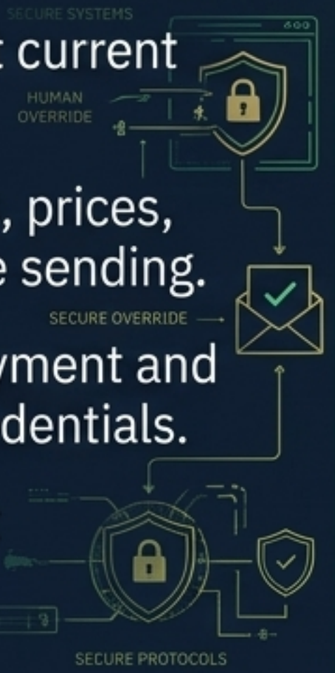
SI ACCELERATION
(Allowable AI activities)

- Drafting client communications.
- Summarizing supplier terms.
- Generating alternative itinerary scenarios.
- Creating flashcards and remediation exercises.



HUMAN ACCOUNTABILITY
(Graded, non-delegable responsibilities)

- Verifying facts against current supplier sources.
- Reviewing tone, dates, prices, and obligations before sending.
- Securing sensitive payment and restricted supplier credentials.
- Making the final client recommendation.



The Safest Rule: SI accelerates research and execution. The advisor remains strictly responsible for verification, compliance, and the client recommendation.

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THE 0-3 CALIBRATION MATRIX

0 | Missing

The element is entirely absent. (e.g., Budget is not asked during Discovery; Taxes/fees are not separated on a Quote).

1 | Weak

The element is present but fundamentally flawed, inaccurate, or exposes the client/brand to risk. Requires heavy intervention.

2 | Competent

The baseline professional standard. Logistically sound, factually accurate, and compliant. The student can function independently.

3 | Strong

Masterful execution. Anticipates unstated needs, provides highly structured alternatives, demonstrates seamless consultative tone, and executes flawless CRM documentation.

Evaluator Rule: A [2] is not a penalty; it is the target for a newly certified advisor. A [3] requires exceptional, proactive value creation.

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UNIVERSAL COMPETENCY HEATMAP

	Risk & Constraints	Fact Verification	Clear Next Action	Professional Tone	Documentation
Discovery Call	INTENSITY: HIGH METRIC: 0.95 STATUS: CALIBRATED	INTENSITY: LOW METRIC: 0.20	INTENSITY: HIGH METRIC: 0.85 STATUS: CALIBRATED	INTENSITY: HIGH METRIC: 0.95 STATUS: CALIBRATED	INTENSITY: LOW METRIC: 0.20
Itinerary Design	INTENSITY: LOW METRIC: 0.20	INTENSITY: HIGH METRIC: 0.95 STATUS: CALIBRATED	INTENSITY: HIGH METRIC: 0.85 STATUS: CALIBRATED	INTENSITY: LOW METRIC: 0.20	INTENSITY: LOW METRIC: 0.20
Quote Construction	INTENSITY: HIGH METRIC: 0.95 STATUS: CALIBRATED	INTENSITY: HIGH METRIC: 0.95 STATUS: CALIBRATED	INTENSITY: HIGH METRIC: 0.85 STATUS: CALIBRATED	INTENSITY: LOW METRIC: 0.20	INTENSITY: LOW METRIC: 0.20
CRM Hygiene	INTENSITY: LOW METRIC: 0.20	INTENSITY: LOW METRIC: 0.20	INTENSITY: HIGH METRIC: 0.95 STATUS: CALIBRATED	INTENSITY: LOW METRIC: 0.20	INTENSITY: HIGH METRIC: 0.95 STATUS: CALIBRATED
Sales Roleplay	INTENSITY: LOW METRIC: 0.20	INTENSITY: LOW METRIC: 0.20	INTENSITY: HIGH METRIC: 0.95 STATUS: CALIBRATED	INTENSITY: HIGH METRIC: 0.95 STATUS: CALIBRATED	INTENSITY: LOW METRIC: 0.20

Insight: [Next Action] and [Documentation] are universal requirements. A failure to define the next step drops the the score in every practical format.

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EVALUATING MECHANICAL ARCHITECTURE: ITINERARY & QUOTE

QUOTE_STATUS: AWAITING CALIBRATION

METRIC: 6x Pts

THE QUOTE RUBRIC CHECK

- [ ] Accurate base price structure.
- [ ] Taxes and fees explicitly separated.
- [ ] Deposit and final-payment terms documented.
- [ ] Cancellation terms correctly stated.
- [ ] Supplier/source clearly noted.
- [ ] Expiration or change risks identified.

ITINERARY_STATUS: AWAITING CALIBRATION

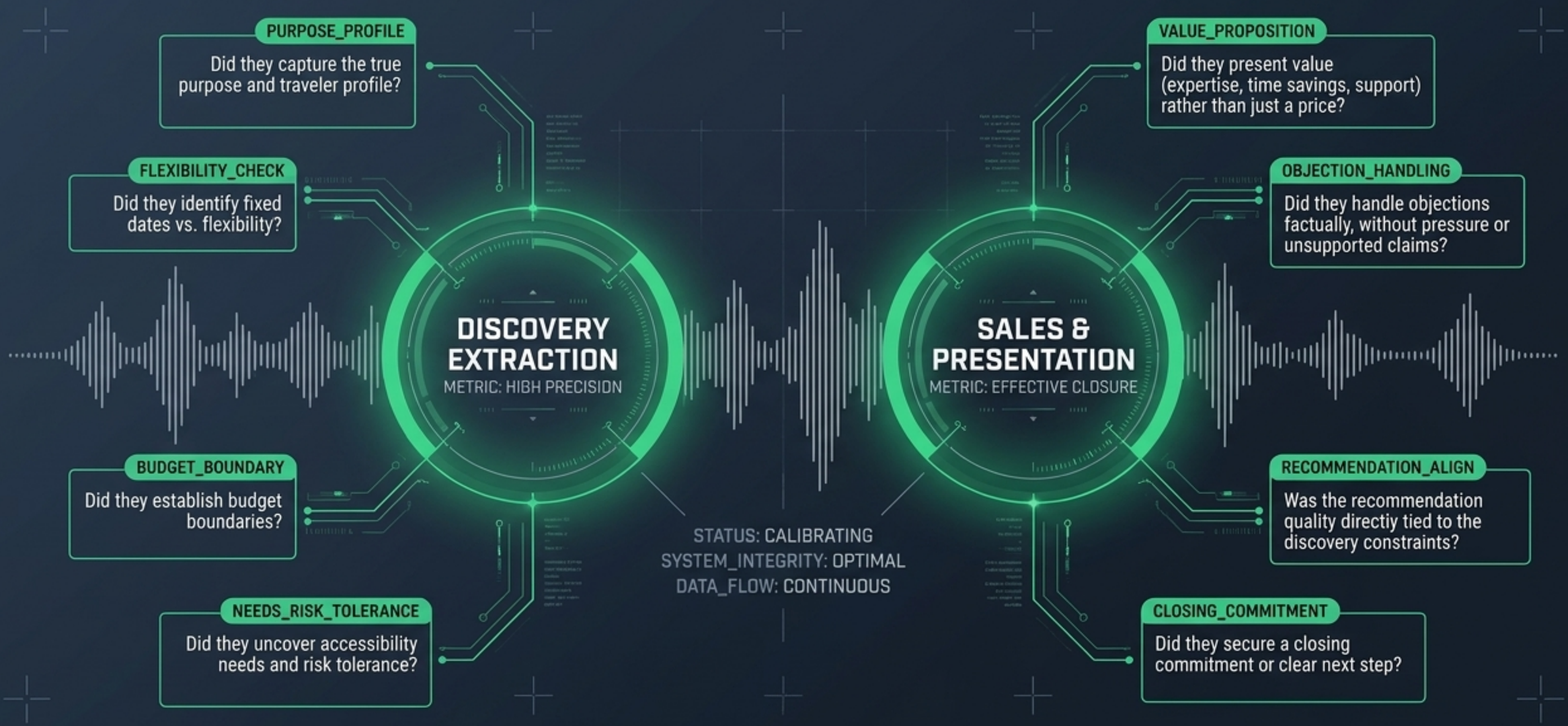
METRIC: 5x Pts

THE ITINERARY RUBRIC CHECK

- [ ] Logical routing without unaddressed logistical conflicts.
- [ ] Realistic timing, pacing, and transit buffers.
- [ ] Accommodation and transportation fit client profile.
- [ ] Clear delineation of inclusions vs. exclusions.
- [ ] At least one viable alternative provided.

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EVALUATING CONSULTATIVE APPLICATION: DISCOVERY & SALES



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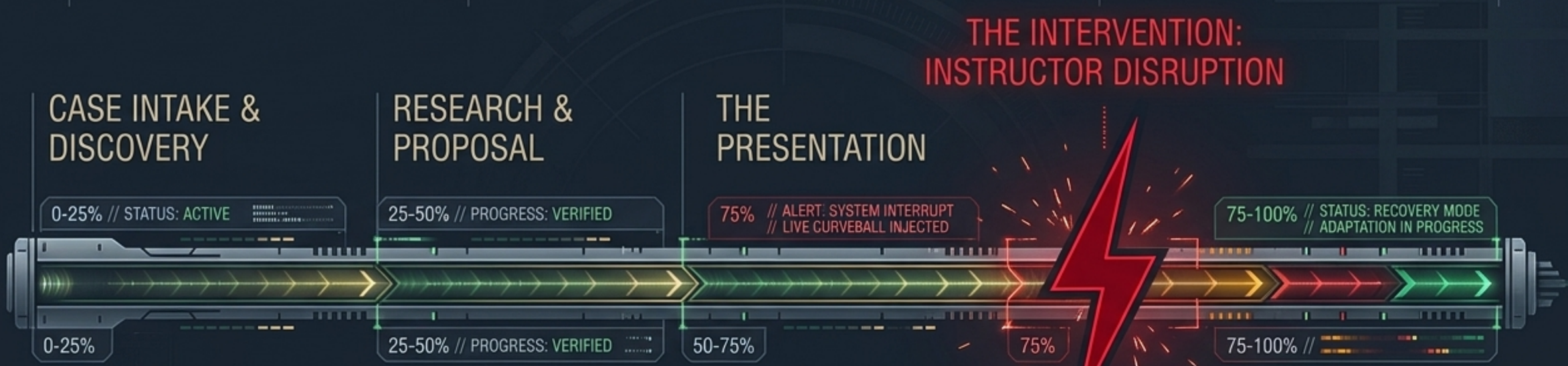
THE ANATOMY OF THE CAPSTONE



THE CAPSTONE DOES NOT TEST NEW KNOWLEDGE. IT MEASURES THE ADVISOR'S ABILITY TO SYNTHESIZE ISOLATED SKILLS INTO A FLUID, PROFESSIONAL TRANSACTION UNDER SIMULATED PRESSURE.

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THE CAPSTONE SIMULATION: THE DISRUPTION EVENT TIMELINE



CASE INTAKE & DISCOVERY
Fictional client, multiple travelers, budget/date constraints.

RESEARCH & PROPOSAL
Build verified options, quote, and CRM record.

THE PRESENTATION
Deliver recommendation, handle objections.

Live curveball injected: sudden price change, cancellation, schedule shift, or new traveler requirement.

RECOVERY & DEFENSE
Student must revise plan, communicate change calmly, explain risks, and secure follow-up.

METRIC: ADAPTABILITY AND CHANGE-RECOVERY ARE EXPLICITLY MEASURED RUBRICS.

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CAPSTONE PRODUCTION SPECIFICATIONS

- [ ] Review/Conduct Discovery Interview
- [ ] Research minimum of three (3) supplier/product options
- [ ] Produce recommended itinerary + one (1) alternate
- [ ] Prepare quote with verified terms and deadlines
- [ ] Record case completely in the Travel Dakdan CRM training structure
- [ ] Process the Instructor Disruption
- [ ] Deliver revised recommendation and oral defense

Footer: Only complete manifest submissions are eligible for rubric scoring by the Quality Assurance Evaluator.

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THE FINAL SIGNOFF: USAEV CERTIFIED TRAVEL ADVISOR

PRODUCTION LOG MINIMUMS
10 discoveries, 10 quotes, 5 itineraries, 3 supervised bookings, specialty exercises complete.

COMPLIANCE CLEARANCE
State registration verified, TRUE/agency assignment active, 100% on critical gates.



THE CAPSTONE DEFENSE
85% minimum rubric score achieved, disruption successfully navigated.

SUPERVISOR AUTHORIZATION
Manual verification of factually accurate work, complete CRM records, and appropriate SI usage.

STATEMENT: Certification is not a right of passage; it is an operational authorization to represent the USAEV standard in the market.

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