

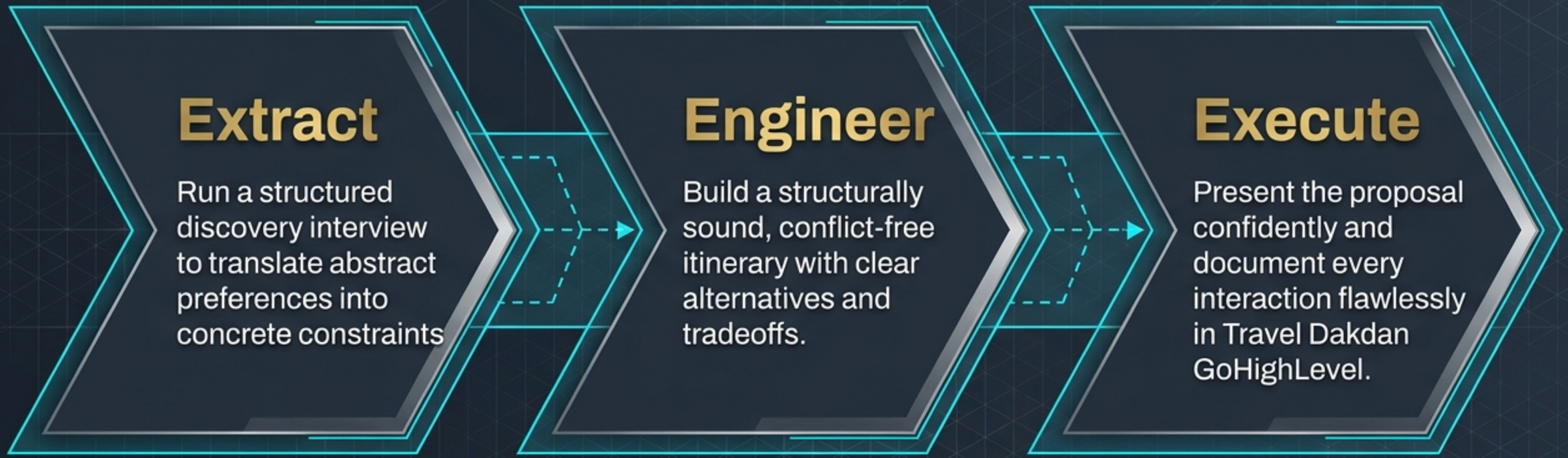
**PRODUCER ACTION:**
Trigger the 10-minute SI-generated diagnostic quiz for Days 1-3 before advancing.

# Day 4: Client Discovery & Itinerary Design

From Conversation to Blueprint.

Gemini Notebook

# The Objective of Day 4




Gemini Notebook

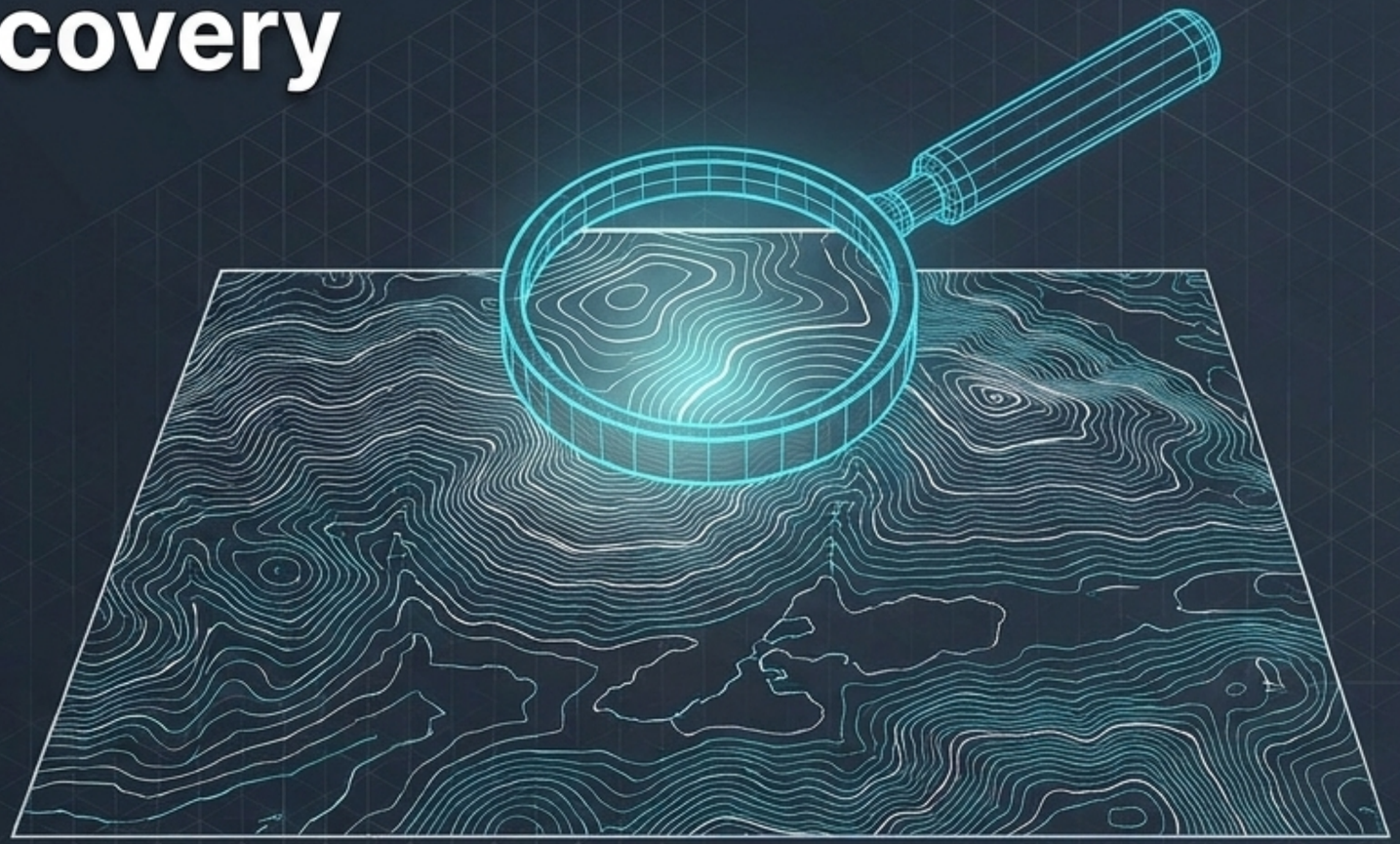
# Order-Taker vs. USAEV Itinerary Architect

| | Order-Taker | USAEV Architect |
|---|---|---|
| **Initial Question** | Where do you want to go? | What is the purpose of this trip? |
| **Data Collection** | Takes reactive notes on a legal pad. | Proactively maps constraints, priorities, and risk factors. |
| **Proposal** | Quotes the absolute cheapest price. | Designs 3-tier proposals with strategic tradeoffs. |
| **Logistics** | Hopes nothing goes wrong on the trip. | Physically engineers buffers and contingencies into the timeline. |

Gemini Notebook

# Phase 1: The Discovery Call Framework

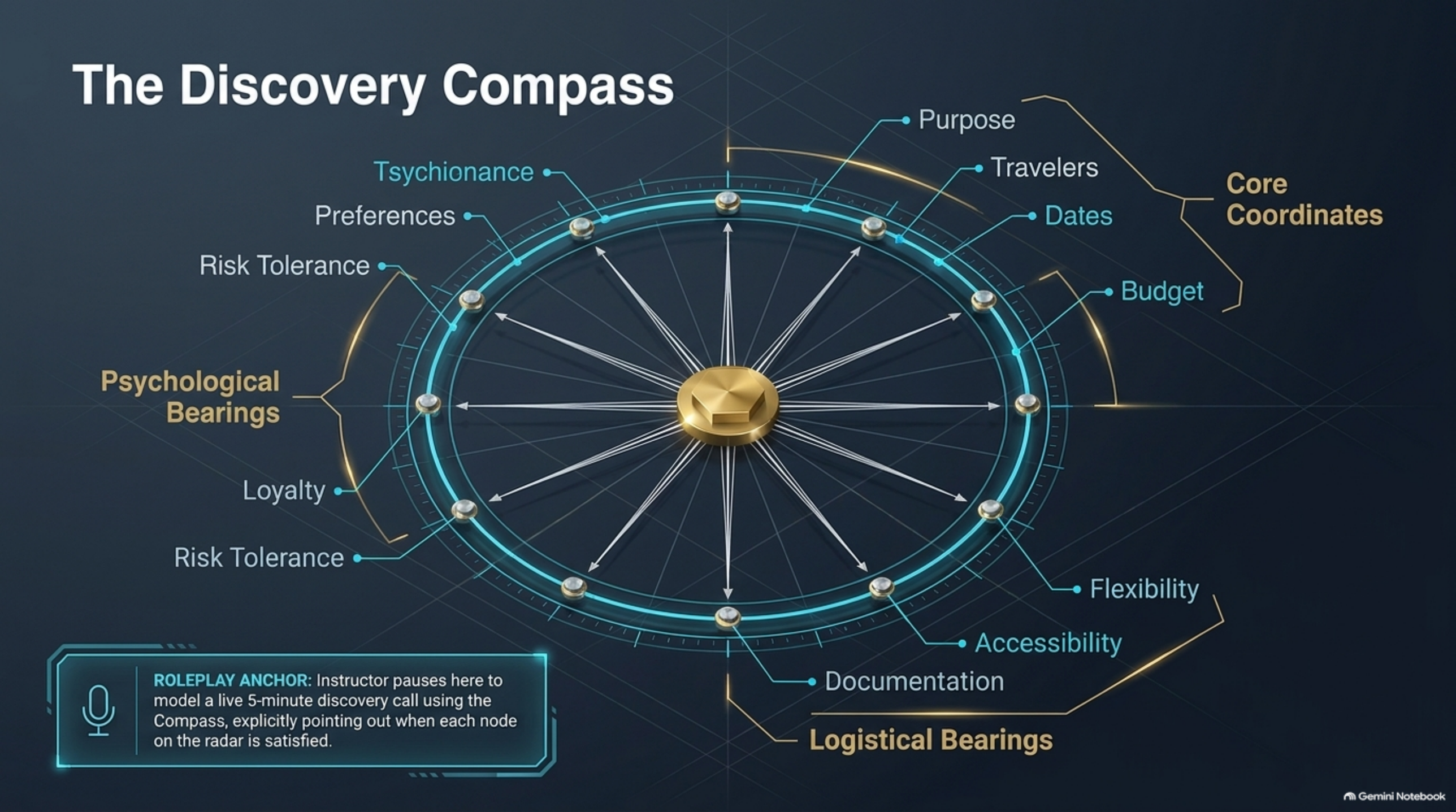
The objective is to translate abstract preferences into concrete constraints and priorities. Do not pitch destinations or products yet.



Phase 1

Gemini Notebook

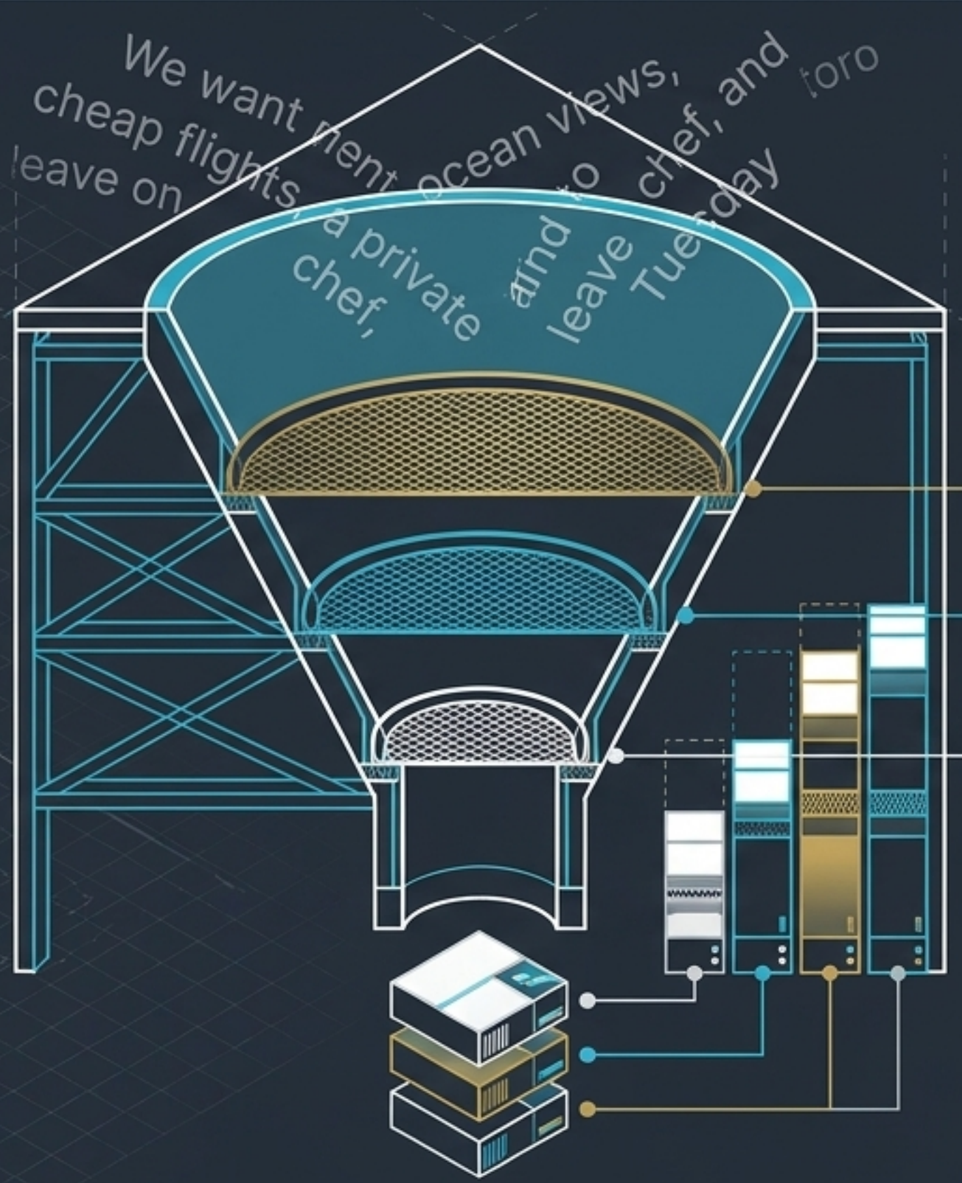
# The Discovery Compass




**ROLEPLAY ANCHOR:** Instructor pauses here to model a live 5-minute discovery call using the Compass, explicitly pointing out when each node on the radar is satisfied.

Gemini Notebook

# Needs Analysis: The Filtration Sieve



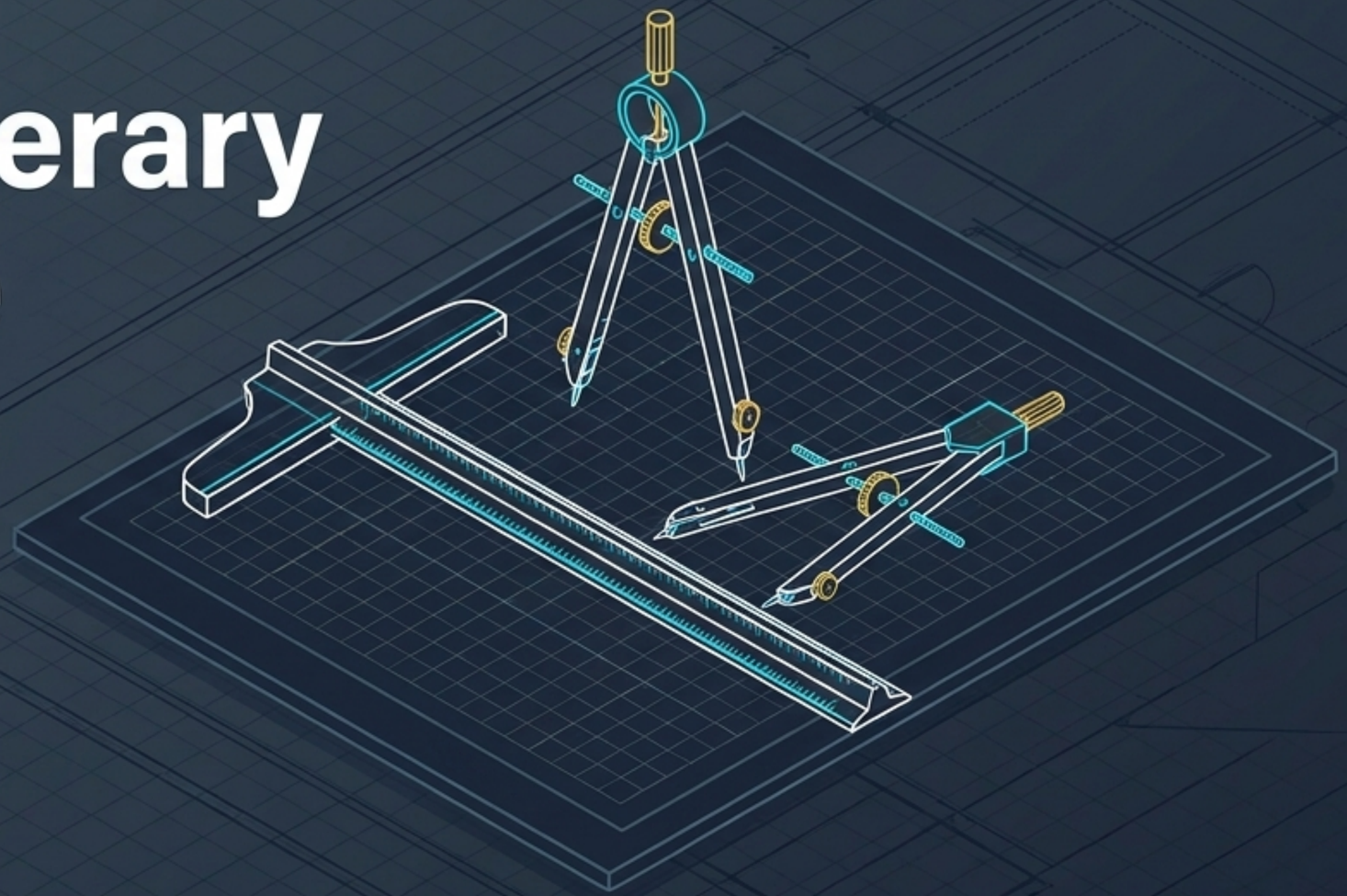

**Layer 1: Must-Have**
The Dealbreakers (Fixed dates, hard budget ceilings, accessibility requirements). An itinerary fails if these are missed.

**Layer 2: Should-Have**
High priority. Highly desired features that are negotiable if the tradeoff provides better value.

**Layer 3: Nice-to-Have**
Upgrades, cross-sells, or bonuses. Added only if the budget comfortably allows after Musts and Shoulds are met.

Gemini Notebook

# Phase 2: Itinerary Architecture

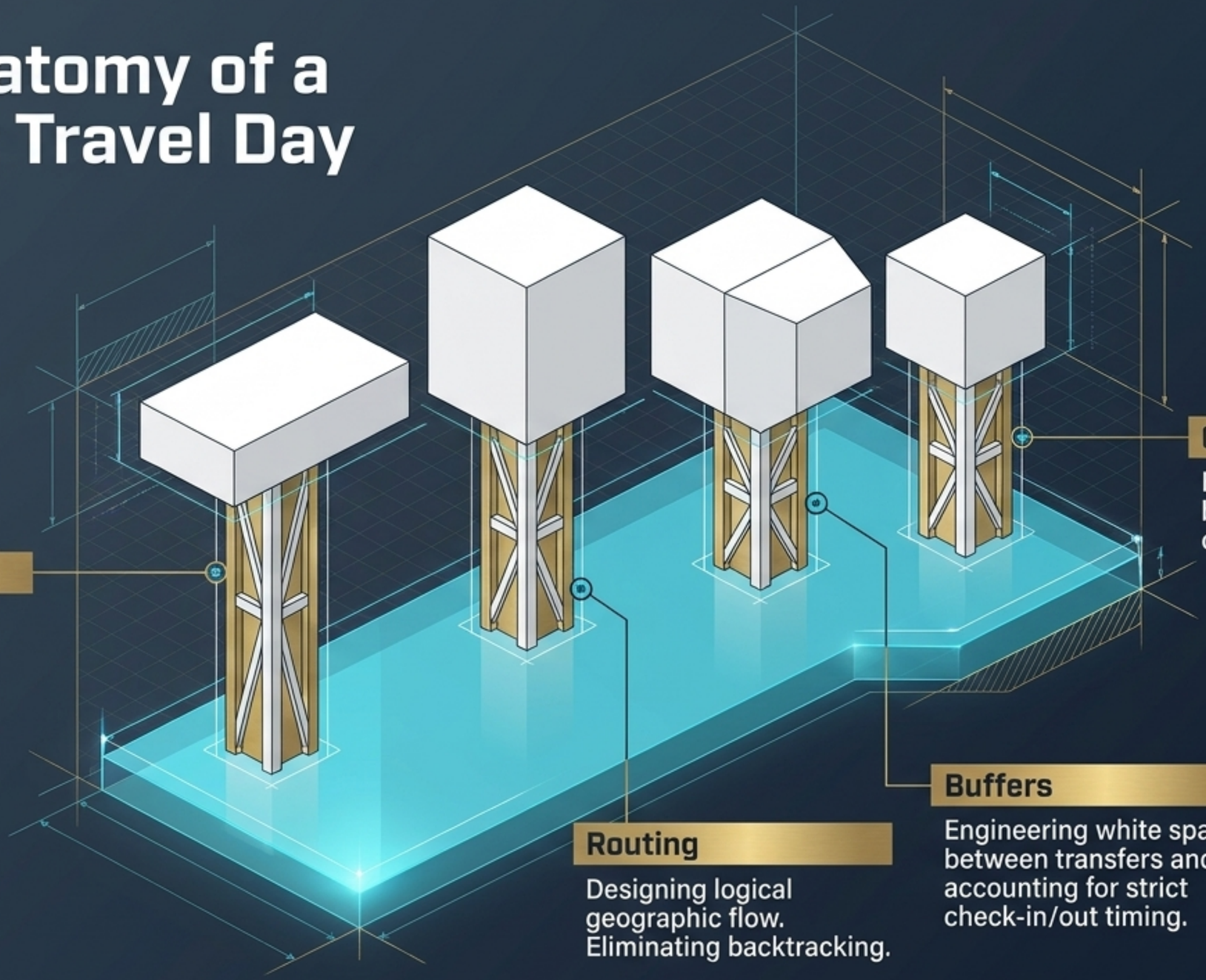


Turning filtered client needs into a structurally sound, logistically viable plan free of operational conflicts.

Phase 2

Gemini Notebook

# The Anatomy of a Perfect Travel Day



## Pacing

Managing activity density. Avoiding traveler burnout.

## Contingency

Building the invisible backup plan for operational disruptions.

## Routing

Designing logical geographic flow. Eliminating backtracking.

## Buffers

Engineering white space between transfers and accounting for strict check-in/out timing.

Gemini Notebook

# Phase 3: The Proposal Presentation

Presenting options, clarifying tradeoffs, and establishing clear next steps. Restate the goal, present the primary recommendation, and provide alternatives only if they add value.



Phase 3

Gemini Notebook

# The Art of the Tradeoff

## Option A (Value)

Maximizes the budget constraint.

Trades off on direct routing or luxury tier to protect the wallet.

## Option B (Primary)

The Target.

Hits 100% of Must-Haves and the majority of Should-Haves.

The baseline recommendation.

## Option C (Premium)

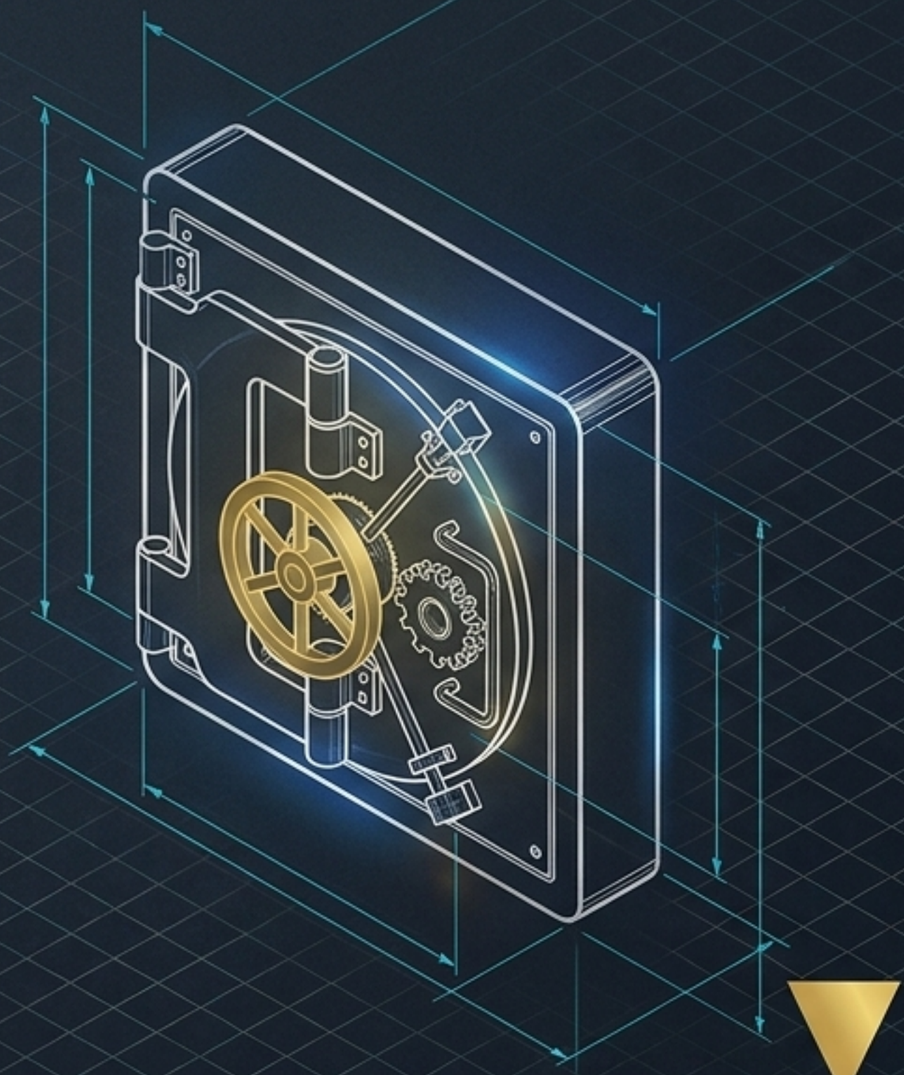
Integrates the Nice-to-Haves and cross-sells, but requires the client to stretch their budget ceiling.

**PRACTICAL TRIGGER:** Initiate SI-Coach roleplay. Apprentices must roleplay presenting Options B and C to a fictional client, clearly articulating the tradeoffs.

Gemini Notebook

# Phase 4: CRM Documentation

If it is not in the Travel Dakdan CRM, it did not happen. Moving from verbal client agreement to a permanent institutional record.



Phase 4

Gemini Notebook

# The Travel Dakdan Nervous System




**GUIDED PRACTICE:**
Students open sandbox GHL accounts and enter data from earlier roleplay.

## Contact Hygiene

Exact legal names, precise dates, and documented consent.

## Decision History

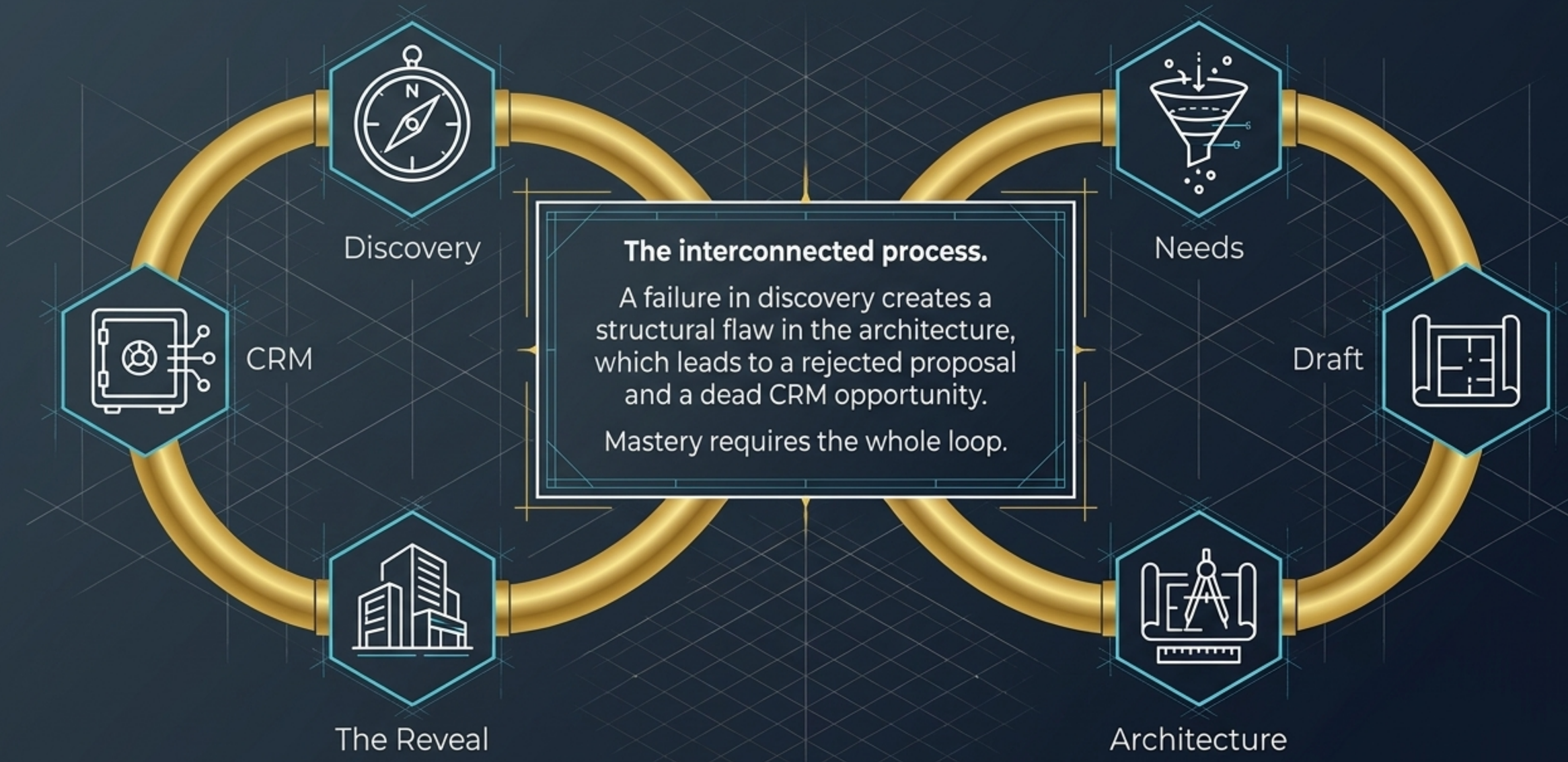
Logged notes, tradeoffs discussed, and explicit client approvals.

## The Lifeline

Every open opportunity requires a documented Next Action and a scheduled follow-up task.

Gemini Notebook

# The USAEV Workflow Loop




Gemini Notebook

# Daily Practical Gate & Assessment

- [ ] Roleplay a 20-minute discovery call (Score 85%+ on rubric).
- [ ] Convert notes into a client profile.
- [ ] Build primary, value, and premium options with zero logistical conflicts.
- [ ] Document interaction and next action in GHL.

HUD

**PRODUCER NOTE:**
Instructor formally opens the assessment gate. Students must complete the step-by-step practical labs to advance.

Gemini Notebook

# What is the correct USAEV protocol if a client's stated "Must-Have" logistically violates their hard Budget constraint?

Do not artificially lower the price or sacrifice safety. **Re-enter the Needs Analysis Sieve**, present the structural conflict to the client, and **force a tradeoff decision** before moving to Itinerary Architecture.

Gemini Notebook