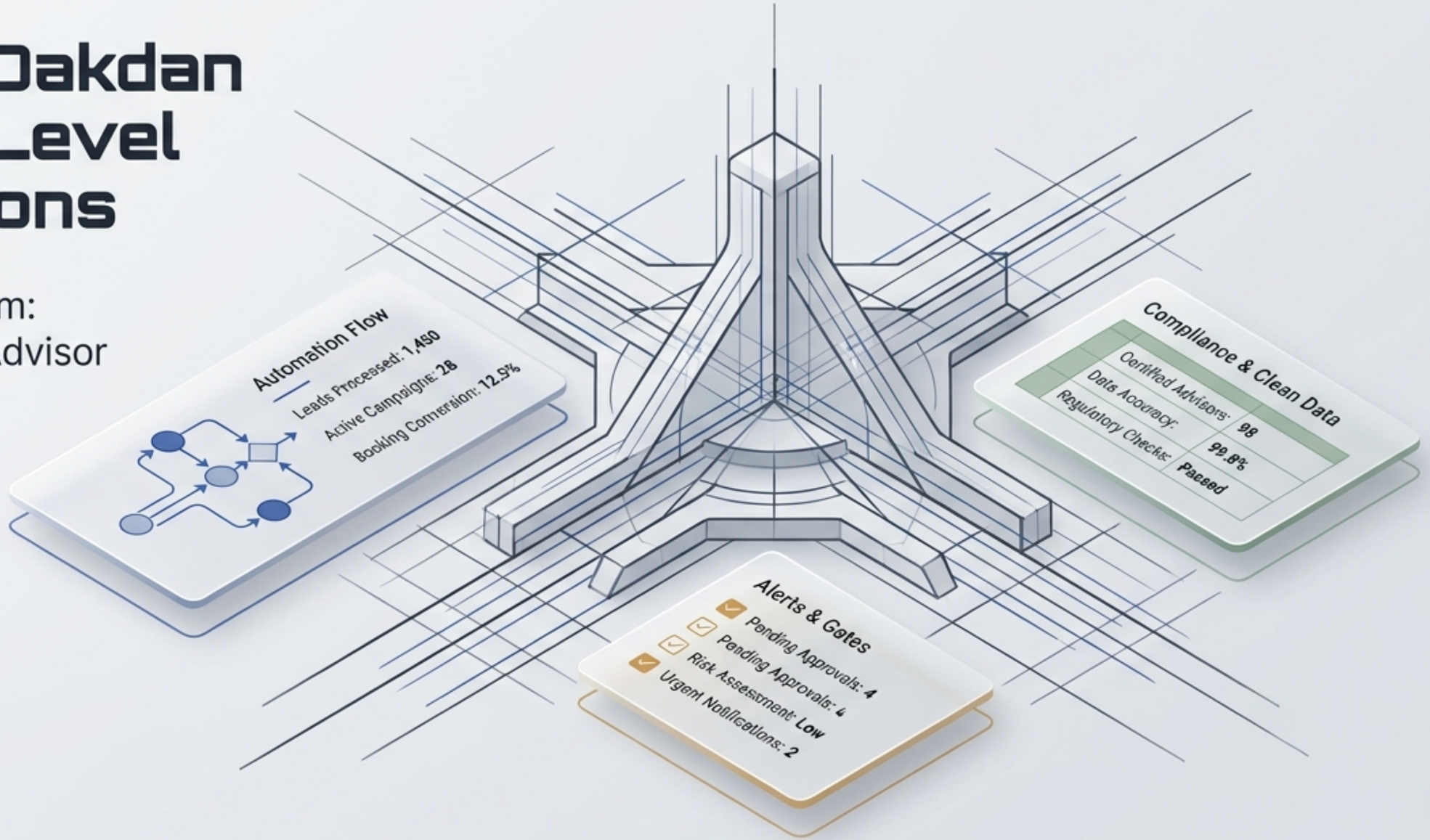
Travel Dakdan GoHighLevel Operations

Day 7 Curriculum: USAEV Travel Advisor Certification



Day 1: Onboarding — Day 3: System Setup — Day 5: Automation Basics — **Day 7: Certification** — Day 10: Advanced Ops

Gemini Notebook

THE ANATOMY OF TRAVEL DAKDAN



1. CONTACT HYGIENE
(THE FUEL)

Ensures clean, accurate data input for reliable systems.



2. TRAINING TRACKING
(THE DASHBOARD)

Monitors team performance and knowledge acquisition.



3. OPPORTUNITY LOGIC
(THE TRACKS)

Defines strategic paths for conversion and growth.



4. FOLLOW-UP AUTOMATION
(THE MOMENTUM)

Automates engagement to sustain progress and speed.



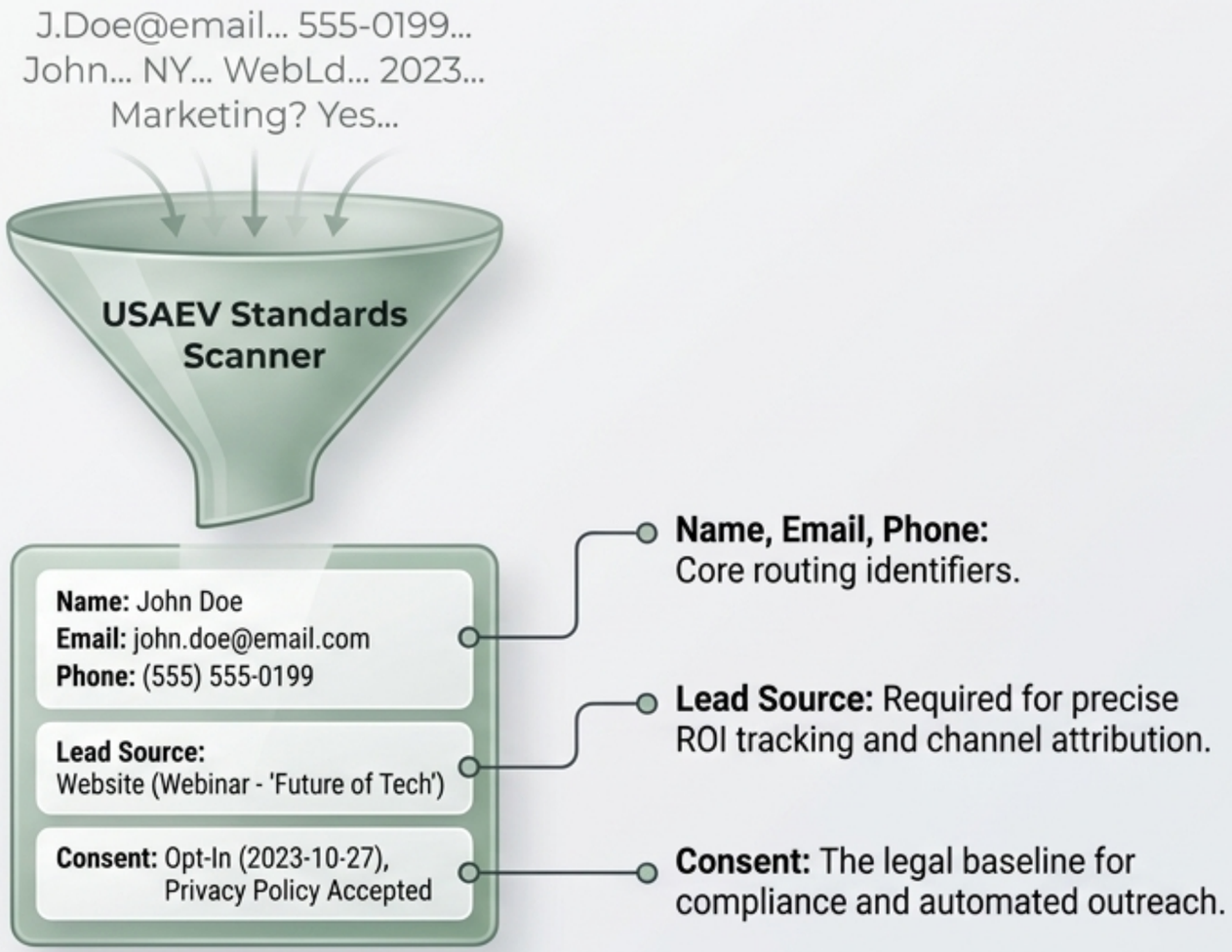
5. DATA QUALITY
(THE PROTECTOR)

Safeguards data integrity and ensures regulatory compliance.

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CONTACT HYGIENE (7.1): BUILDING THE GOLDEN RECORD

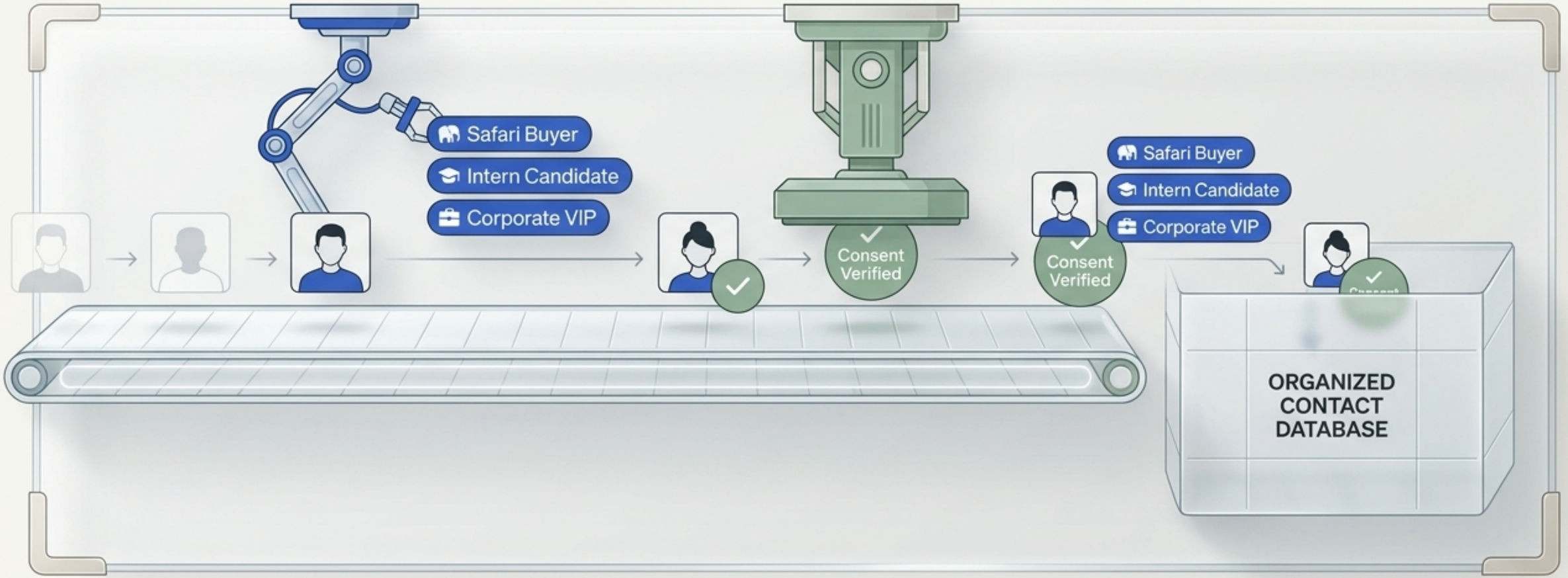
Messy data breaks automation. Perfect data drives revenue.



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Segmentation & Consent Routing

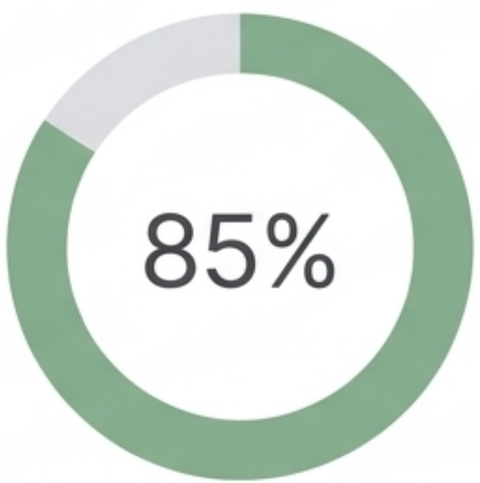
Structuring contacts for targeted workflows and strict compliance boundaries.



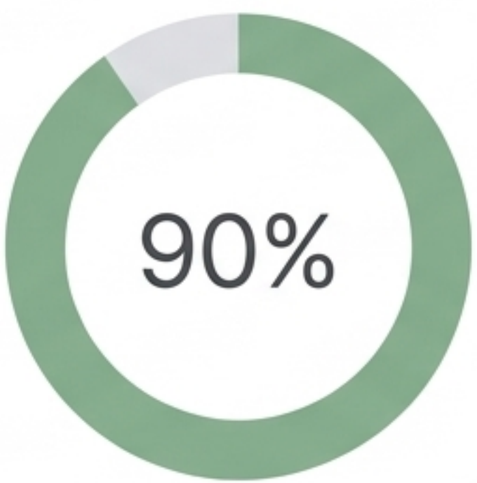
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Training Tracking Fields (7.2): The Student Identity

Real-time visibility into program progression, credential levels, and clearance.



Foundations Exam



Compliance Clearance

Program Status: Active

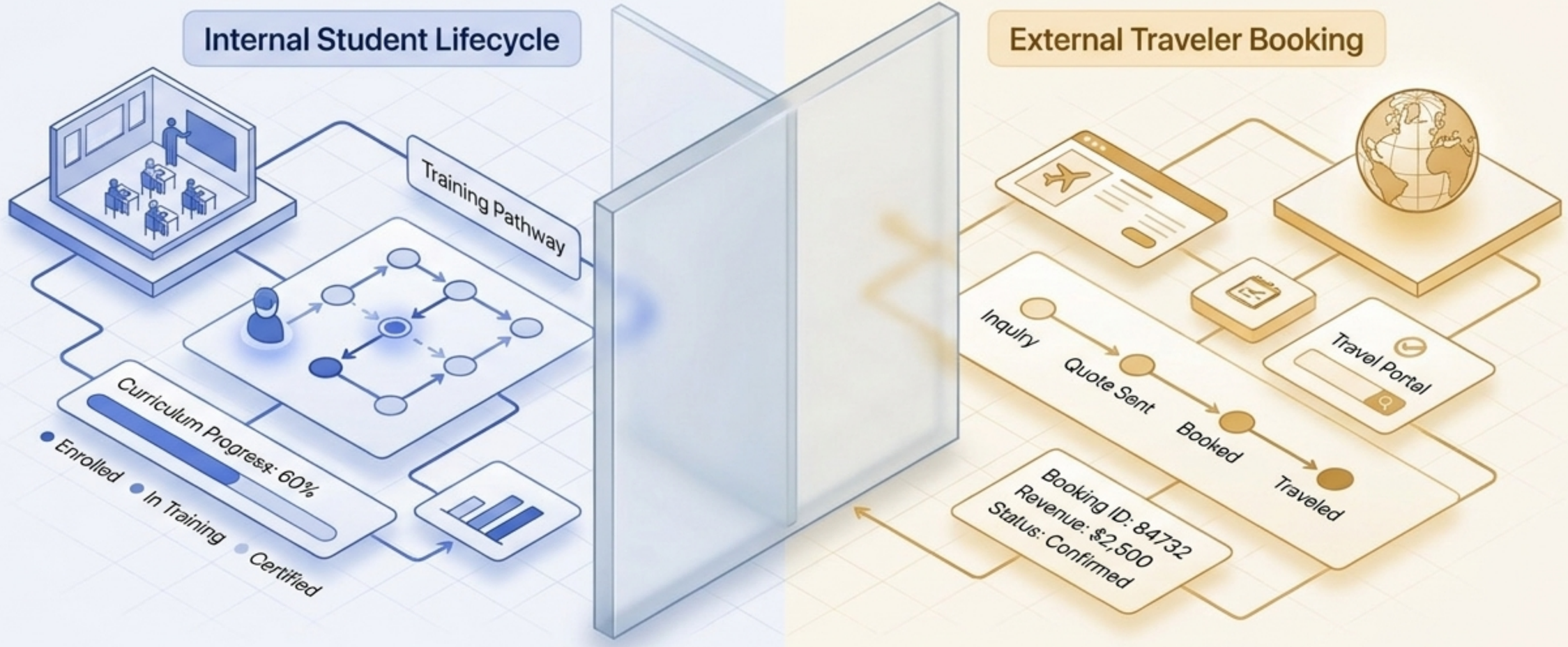
Week: 2

- Candidate
- **Apprentice**
- Certified

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Opportunity Logic (7.3): The Great Divide

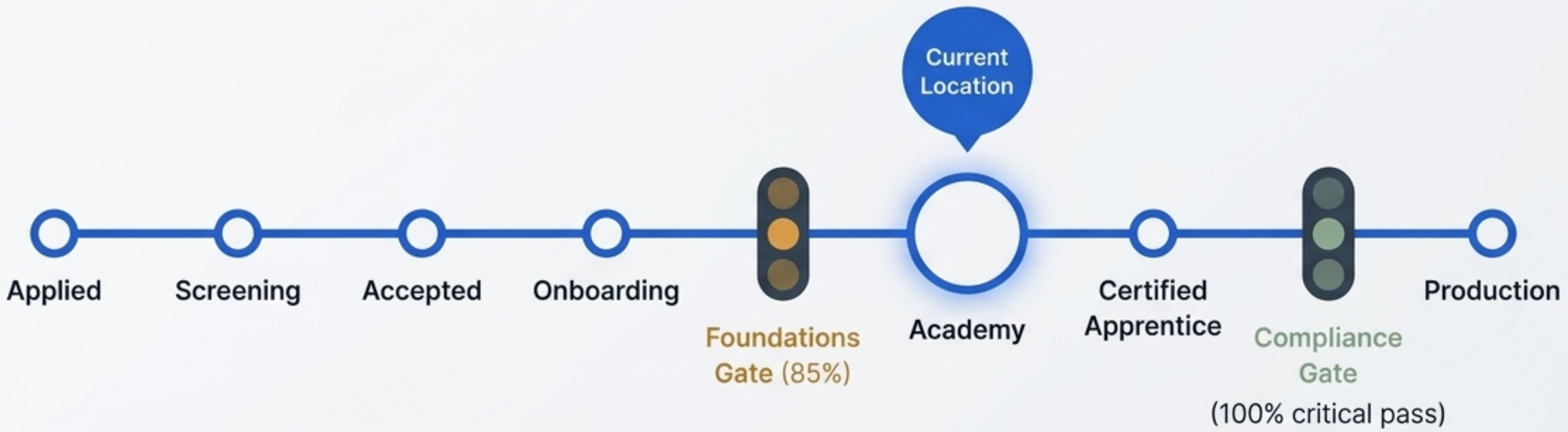
Absolute architectural separation of internal training and external revenue.
Mixing lifecycles breaks reporting and corrupts automated follow-ups.



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Mapping the Student Lifecycle

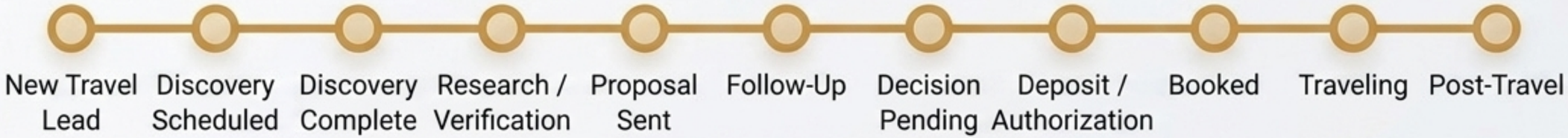
The internal tracks for tracking academy progression and authorization.



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Mapping the Traveler Booking Pipeline

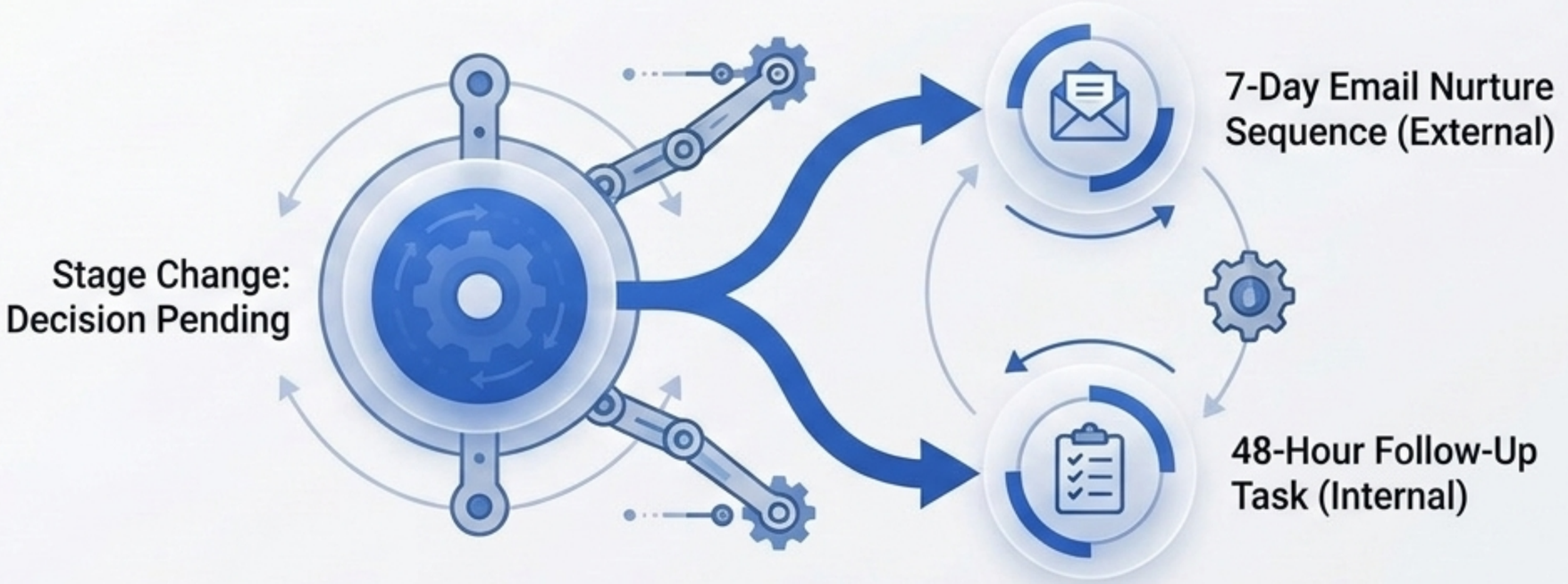
The external tracks for managing client opportunities and revenue generation.



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Follow-Up Automation (7.4): The Invisible Assistant

How Travel Dakdan maintains pipeline momentum without manual intervention.



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Task Management & Escalation Alerts

Ensuring nothing falls through the cracks.

Critical Compliance Miss



Apprentice Paused

Targeted Remediation Triggered

Supervisor Reassessment Required

Weekly Task Report

- [ ] Follow up on Proposal
- [ ] Schedule Discovery Call

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Data Quality Standards (7.5): The Anatomy of a Perfect Note

Documentation is the definitive record of truth for client decisions and compliance.

✗

Talked to client. Sent quote. Waiting to hear back.

✓

Client Call (Timestamp: 10:45 AM, 08/09/2024).

Verified supplier terms: 6-month commitment, net 30.

Attached: Itinerary PDF (File).

Next Action: Follow up on 08/12/2024 to confirm receipt.

1. Automatic Timestamp presence.
2. Clear documentation of verified supplier terms.
3. Attached PDF of the itinerary.
4. Explicitly stated Next Action.

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The Assessment Standard: The 90% Pass Gate

Zero missing required fields. Anything less breaks the automation ecosystem.

Minimum 90%
overall accuracy



0 Missing
Required Fields

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The CRM Mastery Matrix

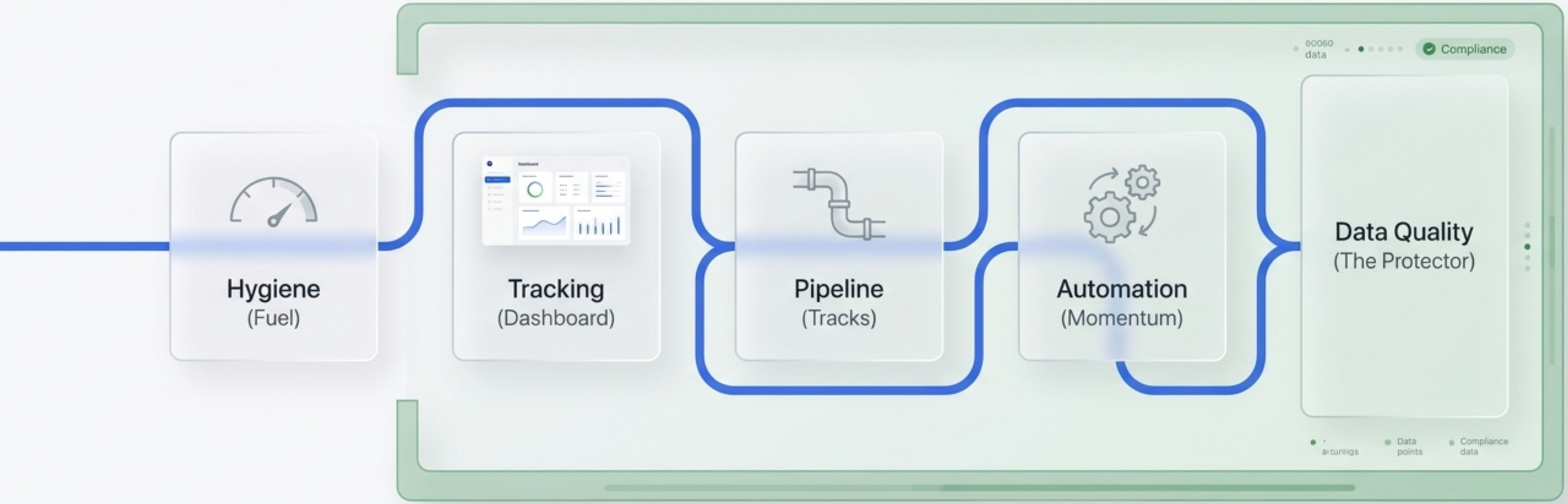
Diagnostic criteria distinguishing a failing entry from a certified entry

	Failing Record (0-1 Score)	Mastery Record (3 Score)
Lifecycle	Mixed student/traveler pipelines	Strict isolation of lifecycles
Fields	Missing basic identifiers/consent	100% complete Golden Record
Notes & Tasks	Vague history, missing due dates	Clear history, explicit next actions
Source/Verification	No attribution, duplicate records	Verified supplier terms, clean deduped records

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Synthesis: The Connected Operating System

Every input drives an automated outcome



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The Day 7 Practical Challenge

Initialize System Simulation.

- [ ] Task 1: Create a complete practice student record.
- [ ] Task 2: Create a practice traveler record (Maintain the Great Divide).
- [ ] Task 3: Log a structured discovery call, a follow-up task, and document the next action.
- [ ] Task 4: Update training score fields and credential status.

Target: 90% Rubric Score. Zero Missing Fields.

Start Simulation

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