USAEV Core Travel Sales Academy: Day 3

Discovery and Qualification

The Architecture of a Perfect Trip

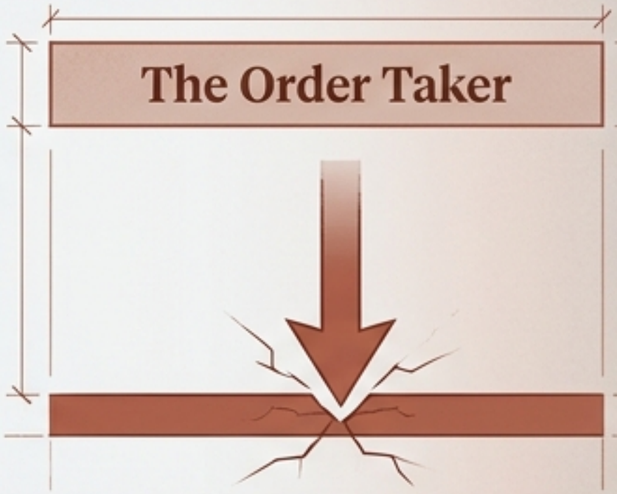
Transitioning from product knowledge to consultative engineering.



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Two Paths to the Client

The Order Taker



Initial Question:
Asks “Where do you want to go?”

Process:
Pitches a destination immediately based on assumptions.

Presentation:
Quotes a price.

Outcome:
Loses the booking to Expedia.

The USAEV Consultative Advisor



Initial Question:
Asks “What is the true purpose of this trip?”

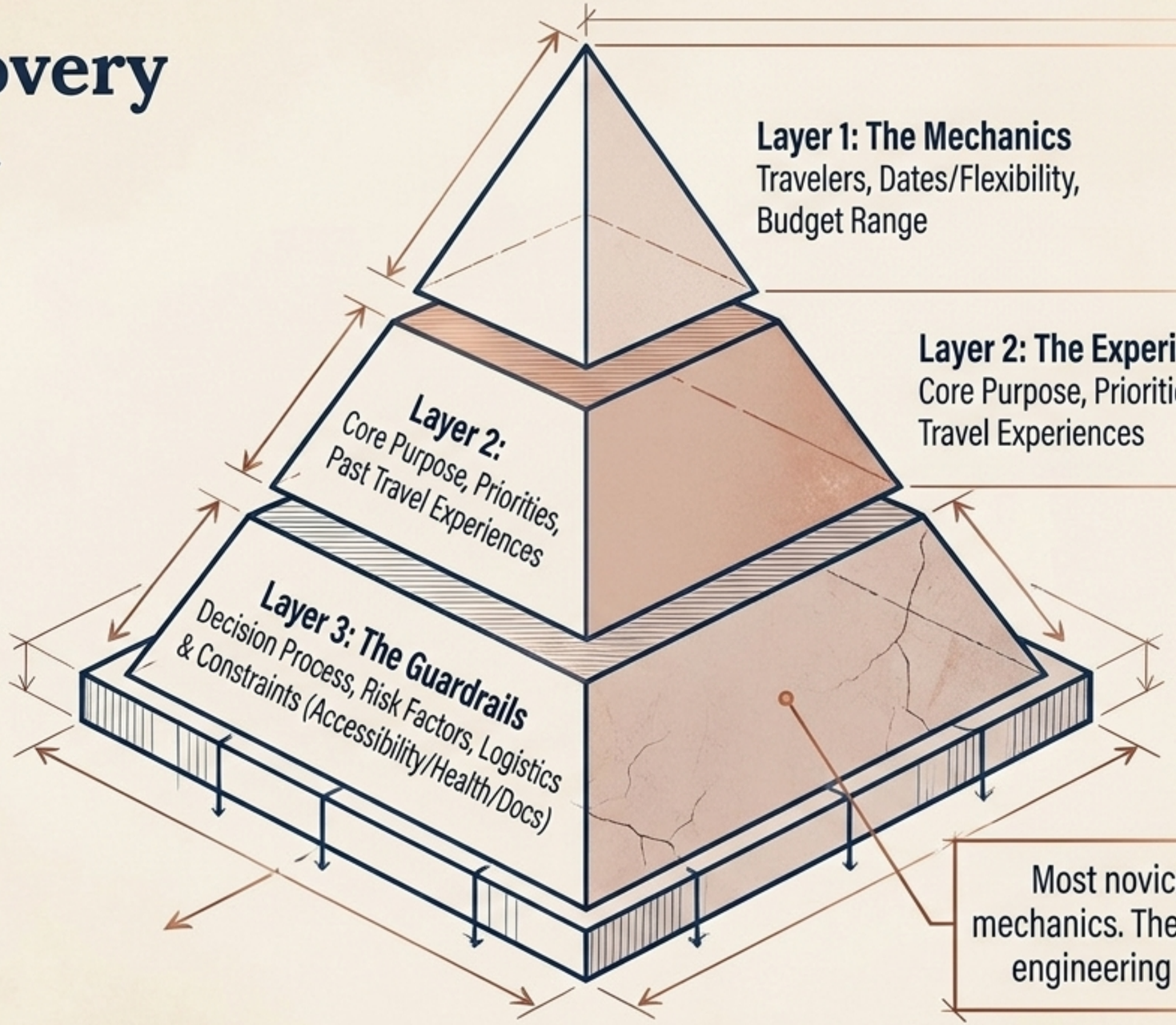
Process:
Engineers a custom solution based on verified constraints.

Presentation:
Presents structured value and clear tradeoffs.

Outcome:
Wins a lifetime client and earns professional referrals.

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The Discovery Blueprint

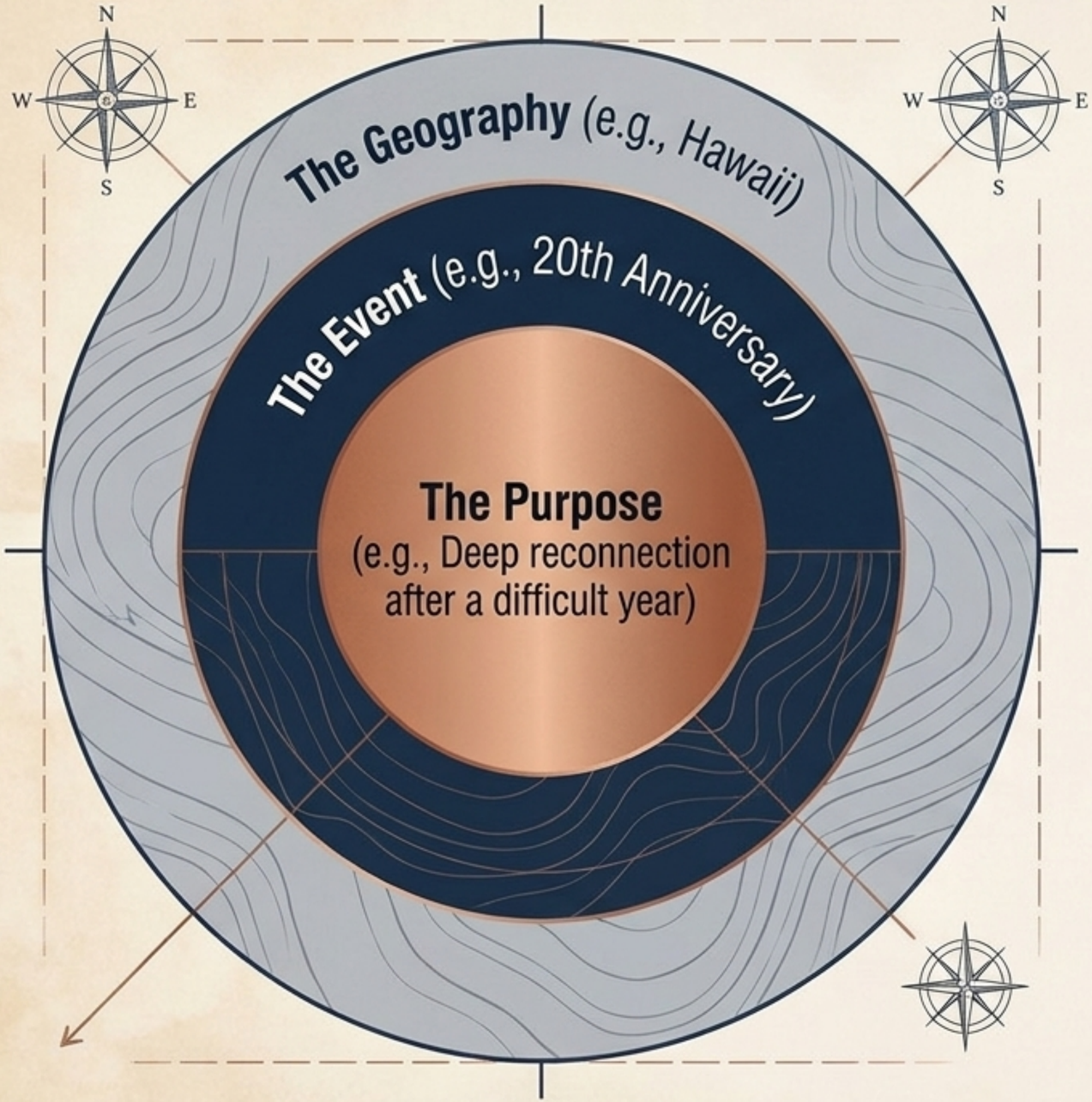


Layer 1: The Mechanics
Travelers, Dates/Flexibility, Budget Range

Layer 2: The Experience
Core Purpose, Priorities, Past Travel Experiences

Most novice advisors stop at the mechanics. The USAEV standard requires engineering from the guardrails up.

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Start with Purpose, Not Geography

Listen for the emotional driver, not just the location request.

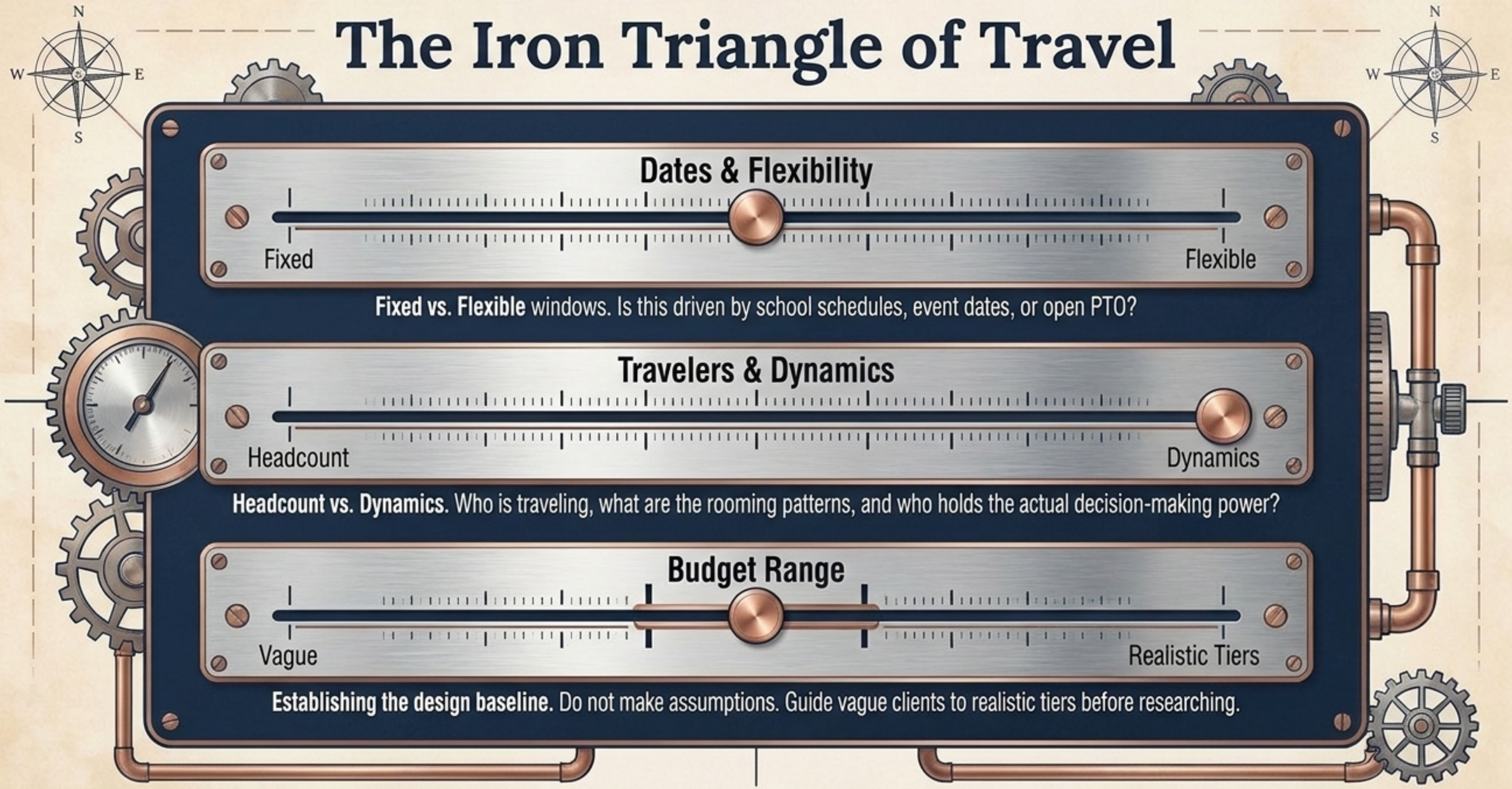
The USAEV Playbook Universal Questions

> "What is the main purpose of this trip?"

> "What are the top three things that would make this trip successful?"

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The Iron Triangle of Travel



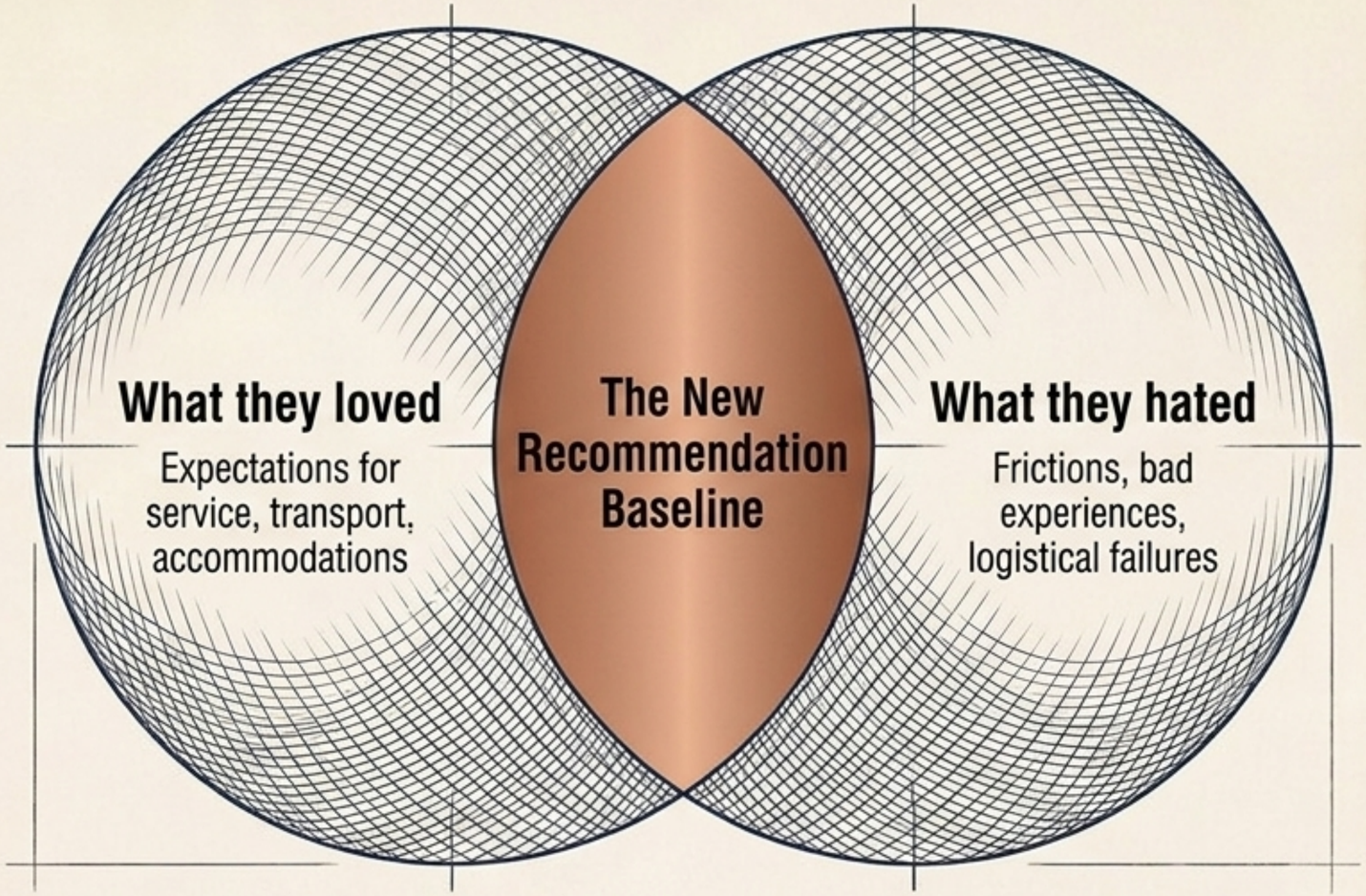
Fixed vs. Flexible windows. Is this driven by school schedules, event dates, or open PTO?

Headcount vs. Dynamics. Who is traveling, what are the rooming patterns, and who holds the actual decision-making power?

Establishing the design baseline. Do not make assumptions. Guide vague clients to realistic tiers before researching.

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The Past Predicts the Future



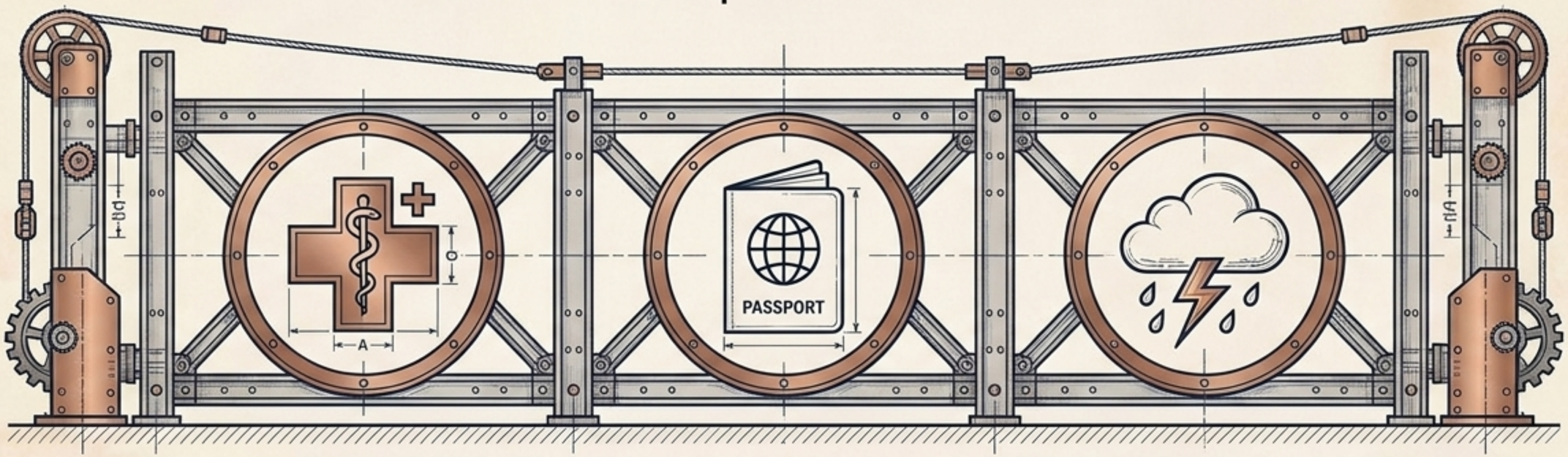
The Playbook Question: What did you like or dislike about similar travel in the past?

Diagnostic Value: Past travel acts as the ultimate cheat code. It establishes the client's true baseline and prevents quoting a 3-star property to a 5-star traveler (or vice versa).

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Define the Guardrails

Protect the Trip. Protect the Client.



Constraints

- Accessibility and mobility requirements.
- Passport, visa, and documentation limits.

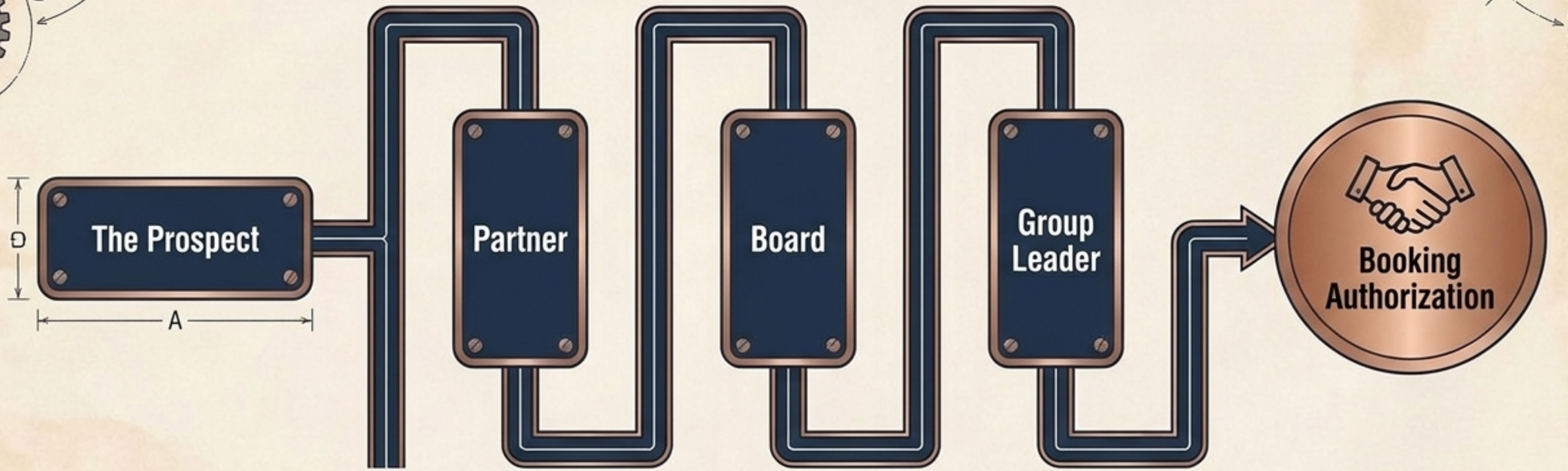
Risk Factors

- Client risk tolerance for connections, weather disruptions, and complex independent logistics.

COMPLIANCE WARNING: Ask about health/accessibility logistics required for travel without prying into unnecessary or protected medical details.

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Map the Decision Process



Who?

Who is involved in the final sign-off? Discover the ultimate decision-maker today.

How?

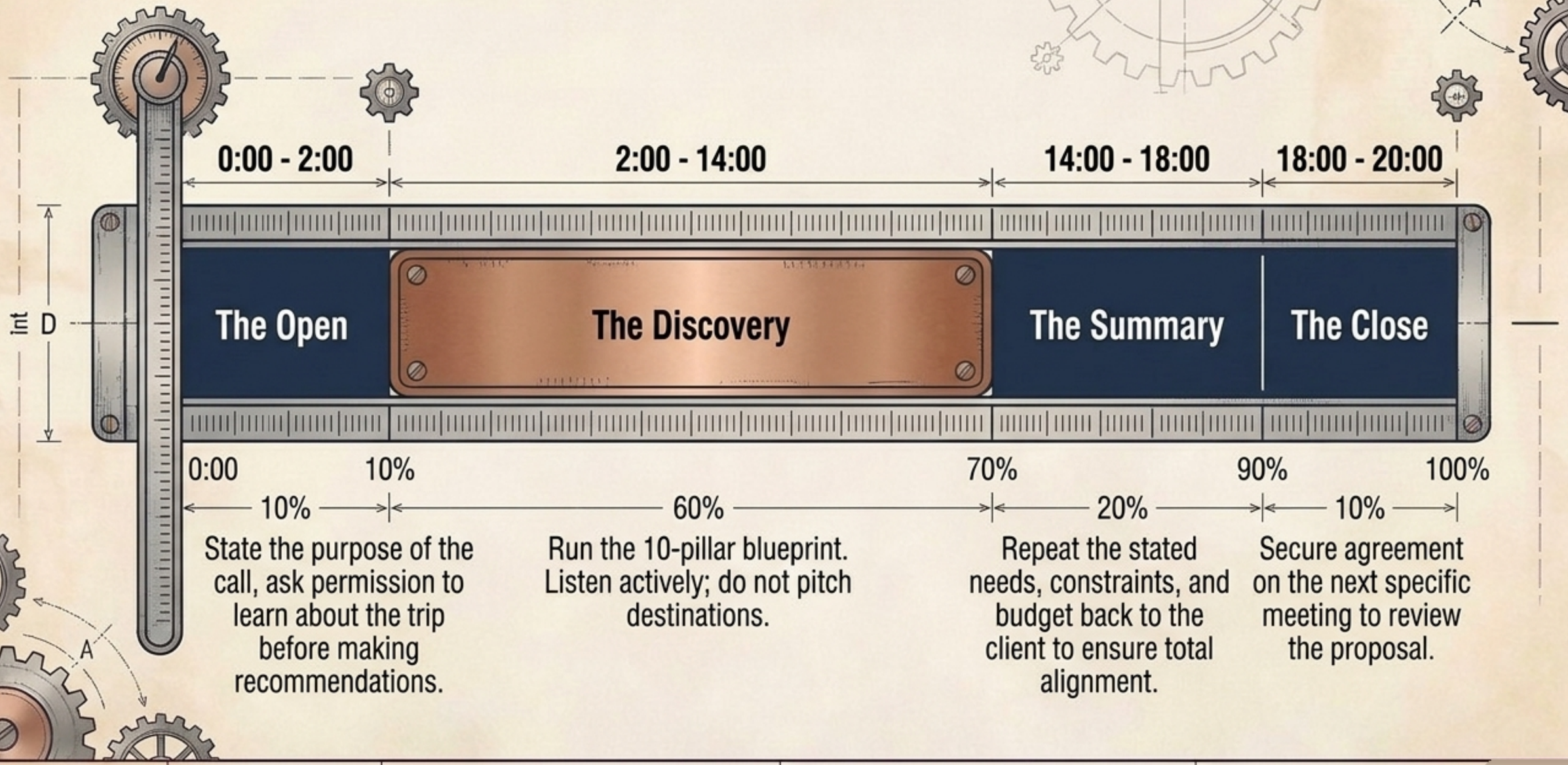
What exact criteria will make them choose one option over another?

When?

When do they intend to make the final decision?

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The 20-Minute Call Architecture



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The Translation Engine

From **Conversation to Data**. If the intelligence stays in your head, it is a liability. It must translate into **GoHighLevel**.

The Conversation

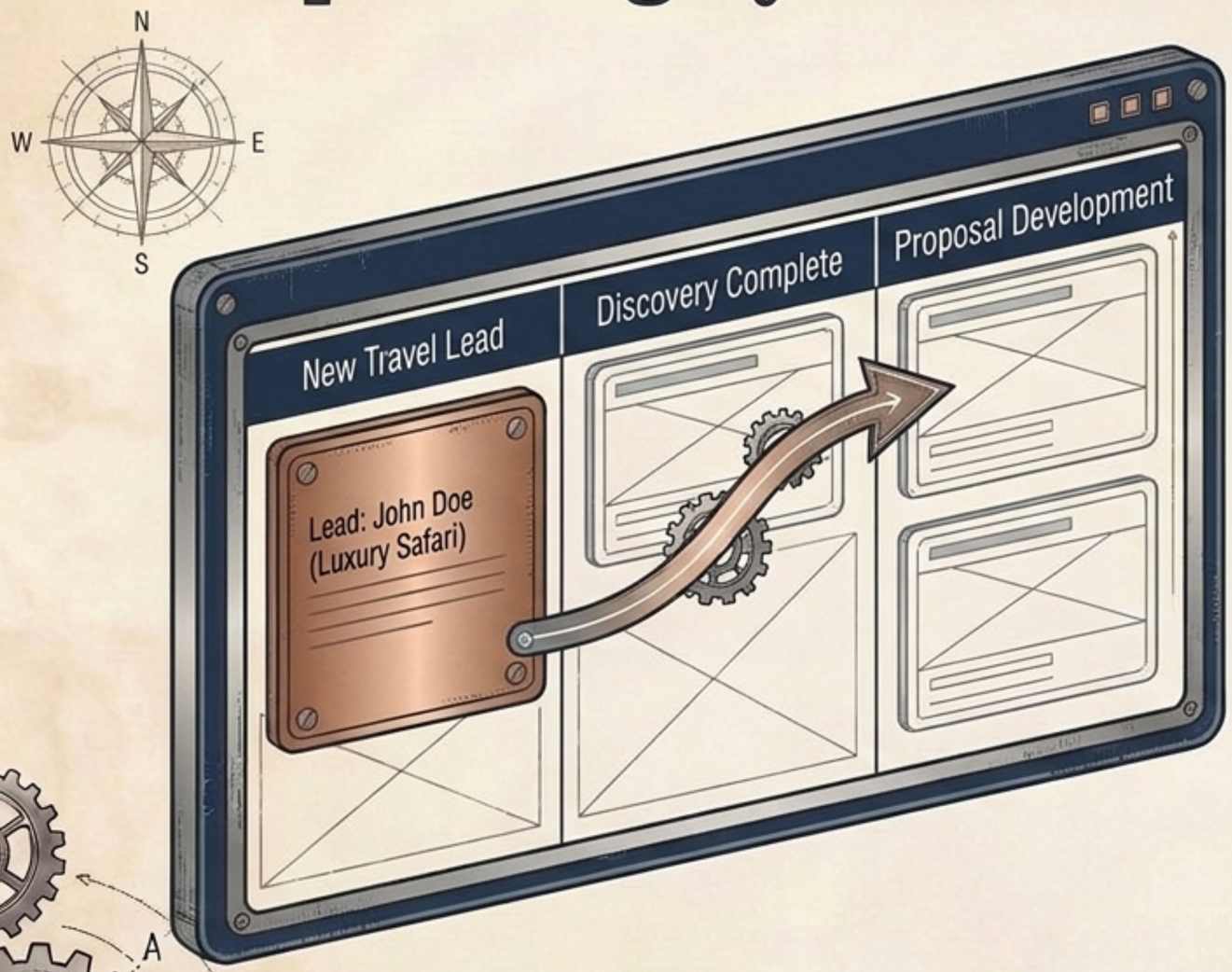
"My husband has a bad knee, and we want to go in June for our anniversary for under $5k."

The CRM Data

- **Constraint Note:** Mobility assistance required.
- **Date Field:** 06/202X
- **Tag:** travel_cert_luxury / **Purpose Note:** Milestone event.
- **Budget Field:** $5,000 maximum.

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The Operating System of Revenue



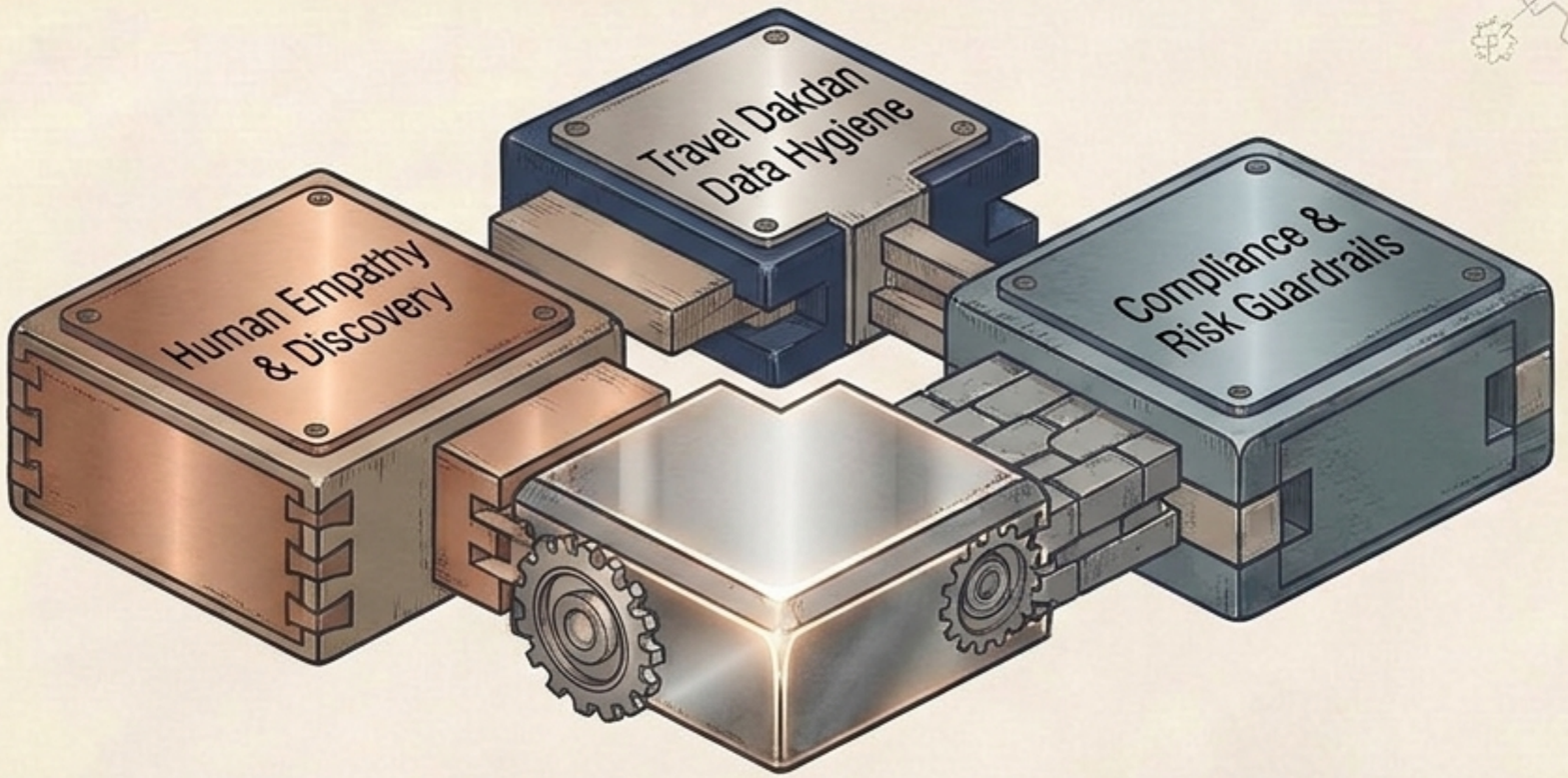
Mandatory CRM Execution

- Update pipeline stage to Discovery Complete.
- Input required contact fields and apply appropriate specialty tags (e.g., travel_cert_safari).
- Log detailed interaction notes and attach the synthesized client profile.
- Set the next automated follow-up task and deadline.

Note: Strictly maintain separation between the training lifecycle and the traveler booking pipeline.

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The Foundation is Set

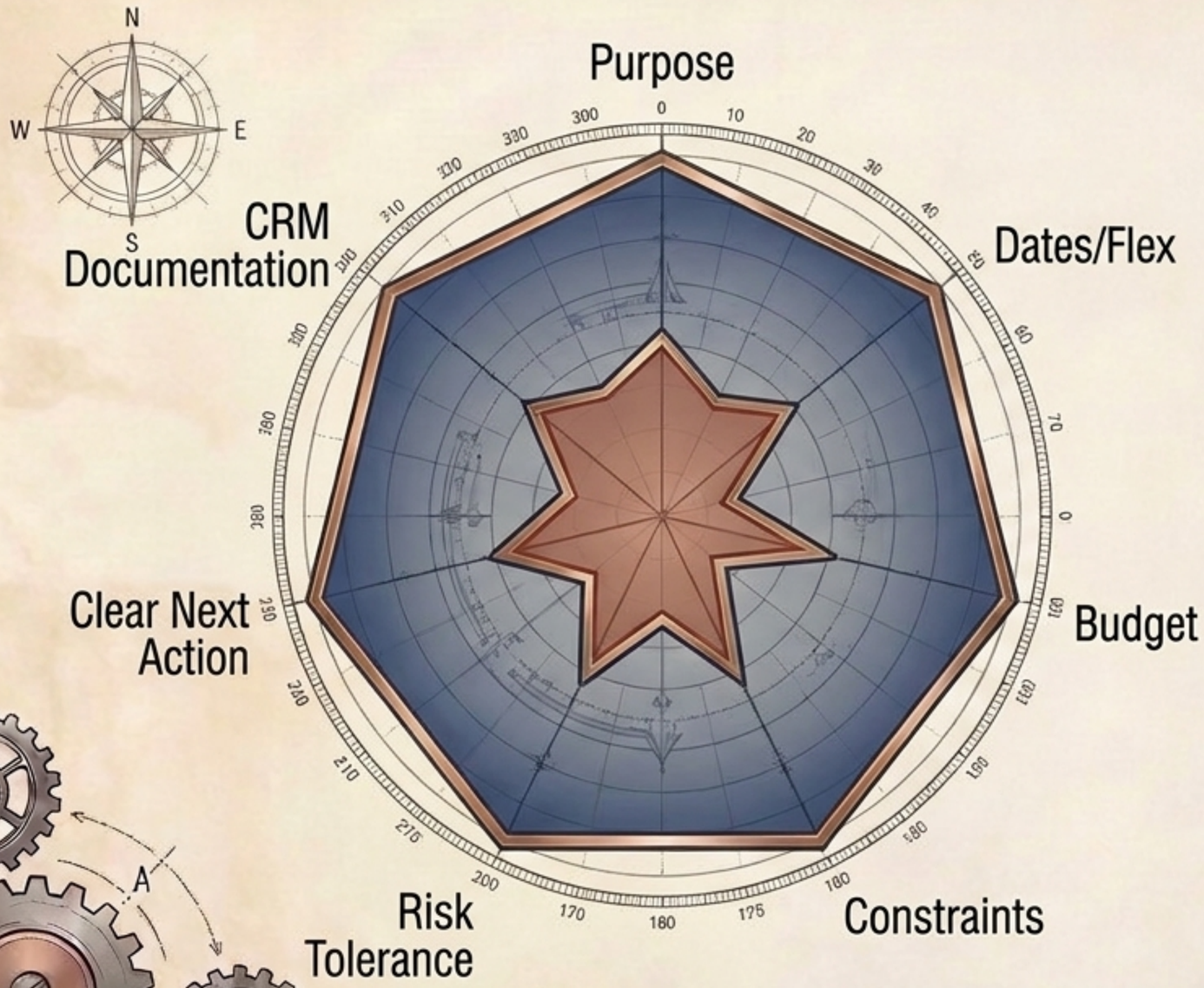


Thorough consultative discovery + **perfect CRM logging** = **a frictionless proposal and closing phase.**

The Outcome: The blueprint is drafted. Tomorrow (Day 4: Package Design) relies entirely on the structural integrity of the data gathered today.

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The Measurement: Discovery Rubric



- **0-1: Weak/Missing.** Fails the gate check. Results in remediation.
- **2: Competent.** Meets the USAEV operational standard.
- **3: Strong.** Demonstrates mastery and deep consultative control.

Critical Rule: Missing any critical compliance item forces an **automatic halt** and remediation.

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Simulation Commencing



The Mission:

Conduct a complete, structured discovery call.

The Parameters:

- **Time Limit:** 20 Minutes maximum.
- **Capture:** Extract all 10 layers of the architectural blueprint from the client.
- **Handle Ambiguity:** Navigate vague client requests using the Playbook Universal Questions.
- **Execute:** Log the entire interaction flawlessly in the GoHighLevel sandbox environment immediately after the call.

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Pre-Flight Gate Check

- [x] Did you uncover the true emotional and practical purpose?
- [x] Are the physical, logistical, and financial guardrails identified?
- [x] Did you establish the precise decision process?
- [x] Is the opportunity accurately logged in the Travel Dakdan CRM?

Next Step: Once verified by the supervisor, the advisor is cleared to advance to Day 4: Package Design.

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