USAEV Core Travel Sales Academy | Day 6

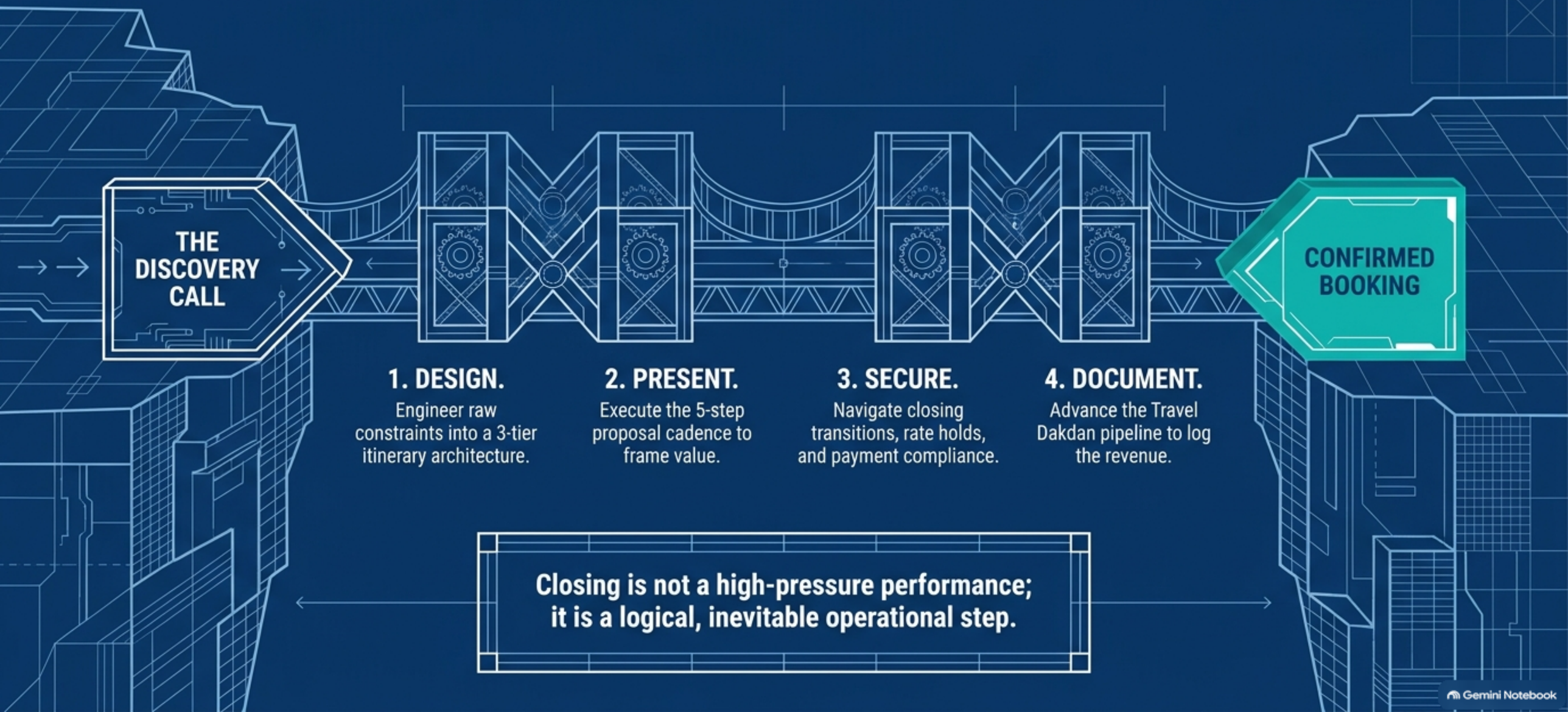
PROPOSAL PRESENTATION & CLOSING

Translating Discovery Findings into Booked Revenue

Travel Dakdan GoHighLevel Operating System

Gemini Notebook

THE CONVERSION BRIDGE



1. DESIGN.
Engineer raw constraints into a 3-tier itinerary architecture.

2. PRESENT.
Execute the 5-step proposal cadence to frame value.

3. SECURE.
Navigate closing transitions, rate holds, and payment compliance.

4. DOCUMENT.
Advance the Travel Dakdan pipeline to log the revenue.

Closing is not a high-pressure performance; it is a logical, inevitable operational step.

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PHASE 1: TRANSLATING DISCOVERY INTO DESIGN

The Input

TRAVELER PURPOSE

DATES & FLEXIBILITY

BUDGET RANGE

MOBILITY CONSTRAINTS

DOCUMENTATION RISKS

The Funnel



APPLY THE USAEV ECOSYSTEM LOGIC
(AIR, LODGING, GROUND, EXPERIENCES, PROTECTION). IDENTIFY AND RESOLVE LOGISTICAL CONFLICTS.

The Output



OUTPUT ARCHITECTURE:
A COHERENT, CLIENT-READY ITINERARY THAT BALANCES PACING, GEOGRAPHY, TRANSFERS, AND CONTINGENCY BUFFERS.

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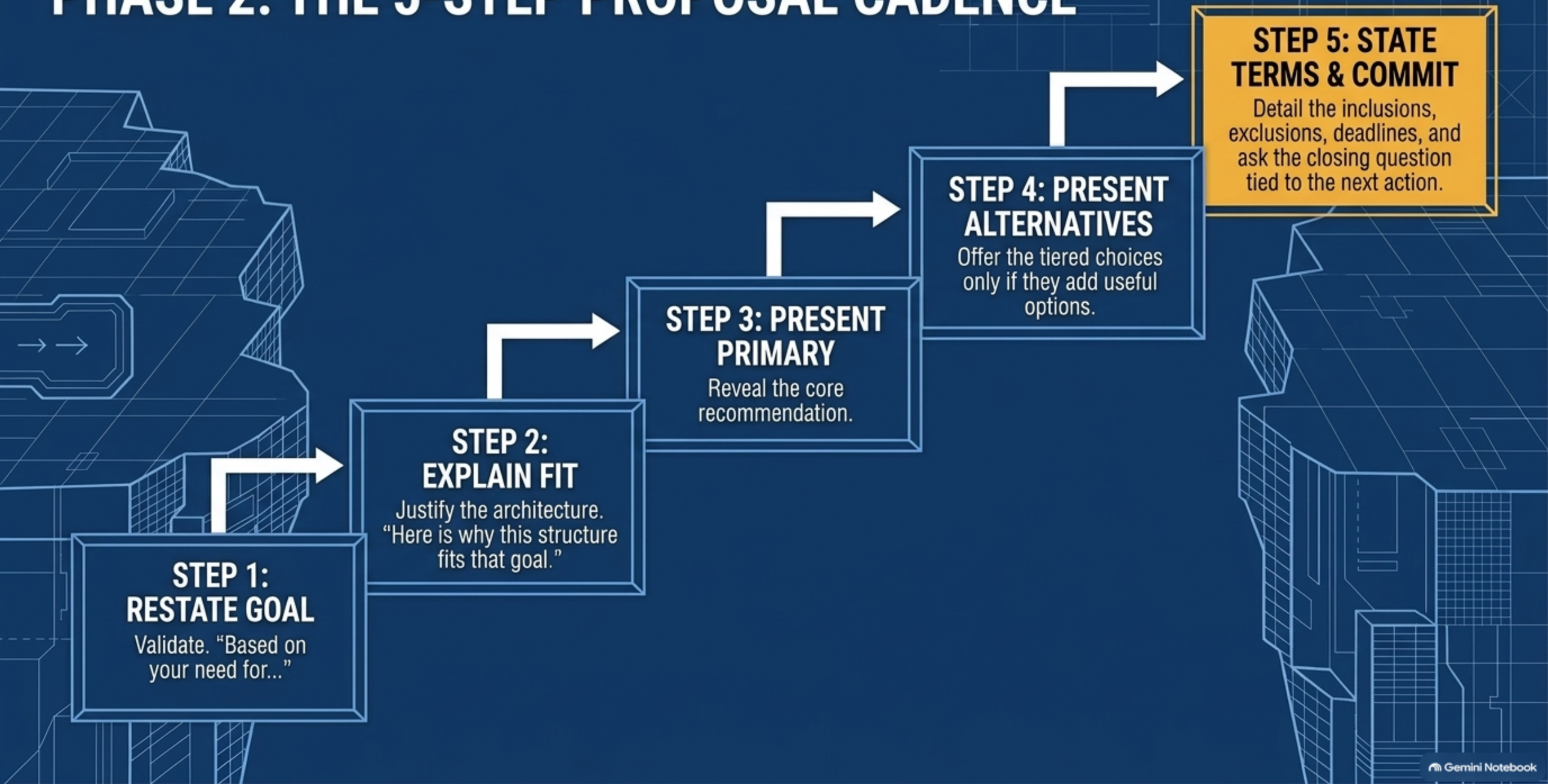
THE 3-TIER PROPOSAL ARCHITECTURE

BASELINE (GOOD)	ENHANCED VALUE (BETTER)	PREMIUM CROSS-SELLS (BEST)
ROW 1 - CONSTANT: CORE DISCOVERY NEED: ALL TIERS SOLVE THE PRIMARY TRAVELER PURPOSE (E.G., THE SAFARI, THE CRUISE, THE RETREAT).		
STANDARD ROOM & AIR	**UPGRADED CABIN & TRANSFERS**	**VIP ACCESS, PRE/POST EXTENSIONS**
RESTRICTIVE FARES	**MODERATE CHANGE TERMS**	**MAXIMUM CANCELLATION FLEXIBILITY & PROTECTION**
LOWEST BASE PRICE	**MID-TIER TOTAL VALUE**	**HIGHEST TOTAL TRIP VALUE** (TIME SAVINGS + RISK REDUCTION)

STRATEGIC NOTE: NEVER BUILD ALTERNATIVES THAT FAIL TO SOLVE THE PRIMARY GOAL JUST TO HIT A LOWER PRICE POINT.

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PHASE 2: THE 5-STEP PROPOSAL CADENCE

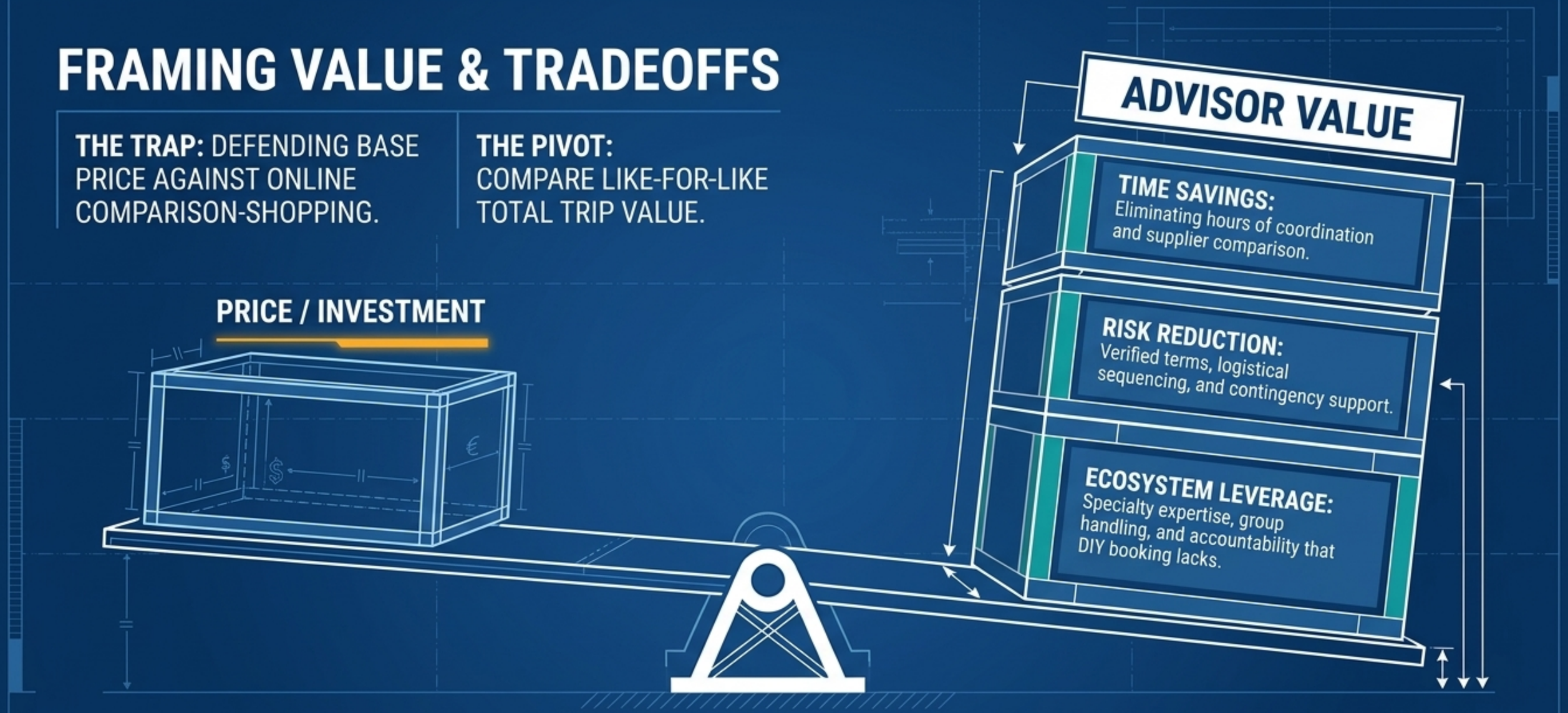


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FRAMING VALUE & TRADEOFFS

THE TRAP: DEFENDING BASE PRICE AGAINST ONLINE COMPARISON-SHOPPING.

THE PIVOT: COMPARE LIKE-FOR-LIKE TOTAL TRIP VALUE.



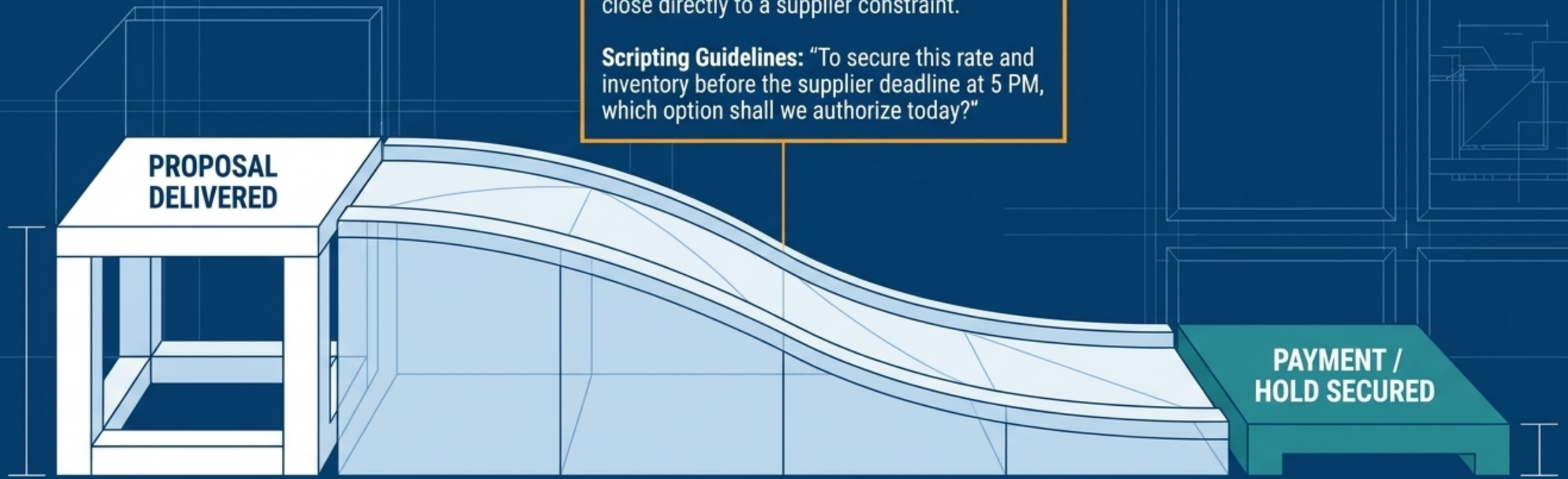
TAKEAWAY: SELL FIT, SERVICE, AND CONVENIENCE RATHER THAN THE LOWEST RATE.

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PHASE 3: THE DIRECT CLOSING TRANSITION

THE PIVOT: Urgency without pressure. Tie the close directly to a supplier constraint.

Scripting Guidelines: "To secure this rate and inventory before the supplier deadline at 5 PM, which option shall we authorize today?"



Anchor Caption:
"Here are your options and deadlines."

Anchor Caption:
Transition immediately into operational next steps—securing the hold and sending the authorization form.

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SECURING THE HOLD: INVENTORY & RATE MANAGEMENT



OPERATIONAL RULES

WHAT TO VERIFY	HOW TO COMMUNICATE
Compare rate terms, room/cabin categories, and deposit deadlines across supplier offers.	Clearly document supplier-controlled rules, change risks, and expiration dates in writing to the client.

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THE PAYMENT AUTHORIZATION PROTOCOL

COMPLIANCE CHECKPOINT: Safely and legally securing funds.

MANDATORY OPERATIONS

- Use only USAEV-approved payment systems.
- Limit data collection to strictly necessary fields.
- Document client authorization explicitly before processing.



STRICTLY PROHIBITED

- Never expose restricted supplier credentials or passwords.
- Never write down or store sensitive payment credentials in unapproved systems (including SI-generated tools).
- Do not state refund rights beyond verified supplier terms.

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HANDLING THE ‘THINK ABOUT IT’ OBJECTION

Trigger: Client pauses decision. “I need to think about it.”

- **Isolate the Roadblock:** Ask what specifically needs to be resolved. (Price? Timing? Partner approval? Uncertainty?)
- **Provide the Tool:** If they need approval, provide a shareable summary. If price, compare like-for-like.
- **Anchor the Follow-Up:** Set a specific follow-up date and time.
- **Note the Deadline:** Remind them of the supplier expiration date to create natural urgency without manufacturing fake pressure.

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PHASE 4: TRAVEL DAKDAN GHL – ADVANCING THE PIPELINE

PROPOSAL IN DEVELOPMENT	PROPOSAL SENT	FOLLOW-UP	DECISION PENDING	DEPOSIT / BOOKING AUTHORIZATION
				

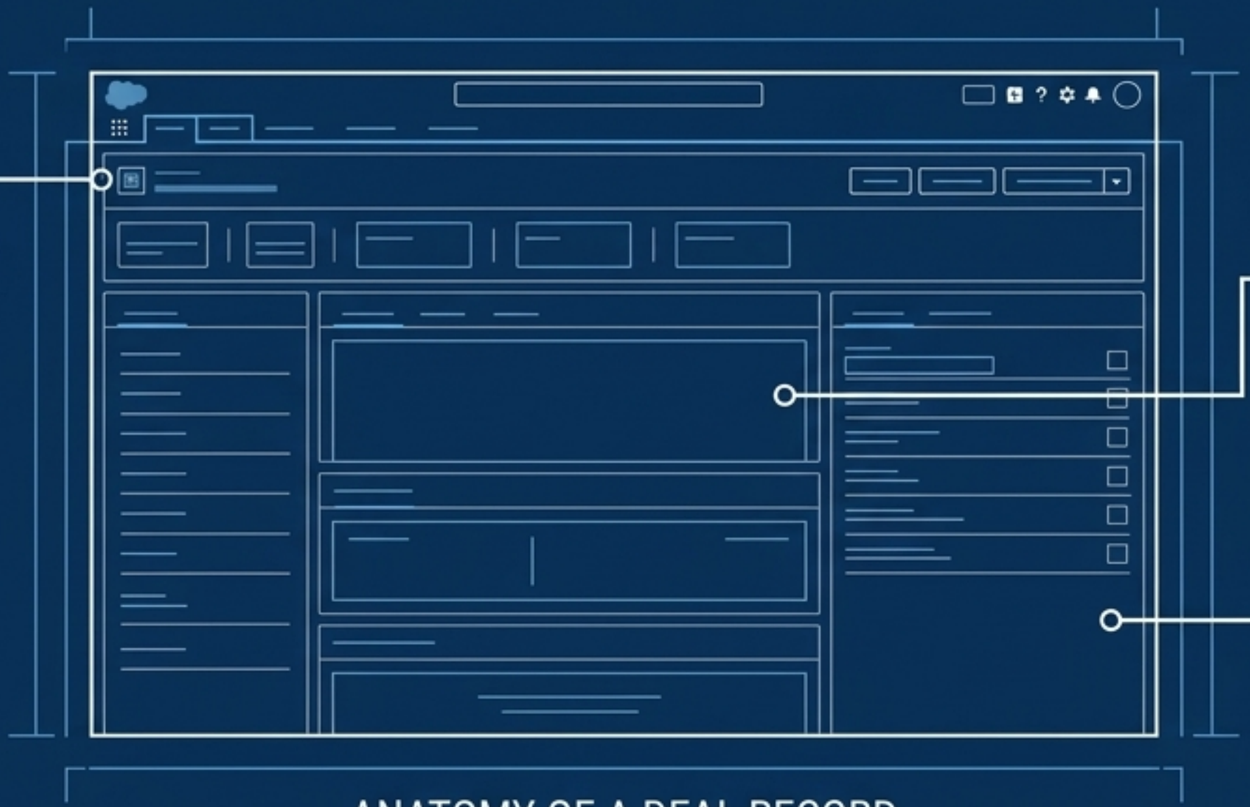
THE ACTION: Once the verbal close is secured and the hold is placed, the opportunity card MUST advance.

SYSTEM LOGIC: Keep the customer travel reservation pipeline completely separate from the internal student/training lifecycle.

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PIPELINE HYGIENE & THE “NEXT ACTION” RULE

TIMESTAMPS & SOURCE:
Proper lead source attribution.



CLEAR NOTES:
Inclusions, exclusions, deadlines, and verified terms logged.

ATTACHMENTS:
Supplier quotes, holds, and disclosures linked.

ANATOMY OF A DEAL RECORD

THE GOLDEN RULE: REQUIRE A NEXT ACTION ON EVERY OPEN OPPORTUNITY. NEVER LEAVE AN ORPHANED OPPORTUNITY IN THE PIPELINE. SET A FOLLOW-UP TASK IMMEDIATELY.

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THE ADVISOR'S CLOSING CHECKLIST (PRE-FLIGHT)

- [x] Did I verify current supplier facts, terms, and inventory?
- [x] Did I check dates, traveler names, and logistical sequencing?
- [x] Have I documented all inclusions, exclusions, deadlines, and risks for the client?
- [x] Am I using only approved systems for sensitive data and payment handling?
- [x] Has the next action been documented in the Travel Dakdan CRM?

Verify state-specific compliance requirements before finalizing the sale.

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PRACTICAL LAB: THE CERTIFICATION CHALLENGE

MISSION BRIEFING

THE MISSION

Deliver a 10-minute end-to-end proposal presentation based on yesterday's discovery data.



THE DELIVERABLES

- Execute the 5-step presentation cadence.
- Present clear value and handle at least one objection.
- Execute a direct closing transition and secure the mock hold.

THE RUBRIC (85% PASS STANDARD)

Evaluated on recommendation quality, value explanation, objection handling accuracy, professional tone, and clear next steps.

ACTION PROMPT: MOVE TO SIMULATION ROOMS. INSTRUCTOR EVALUATIONS BEGIN IN 5 MINUTES.

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