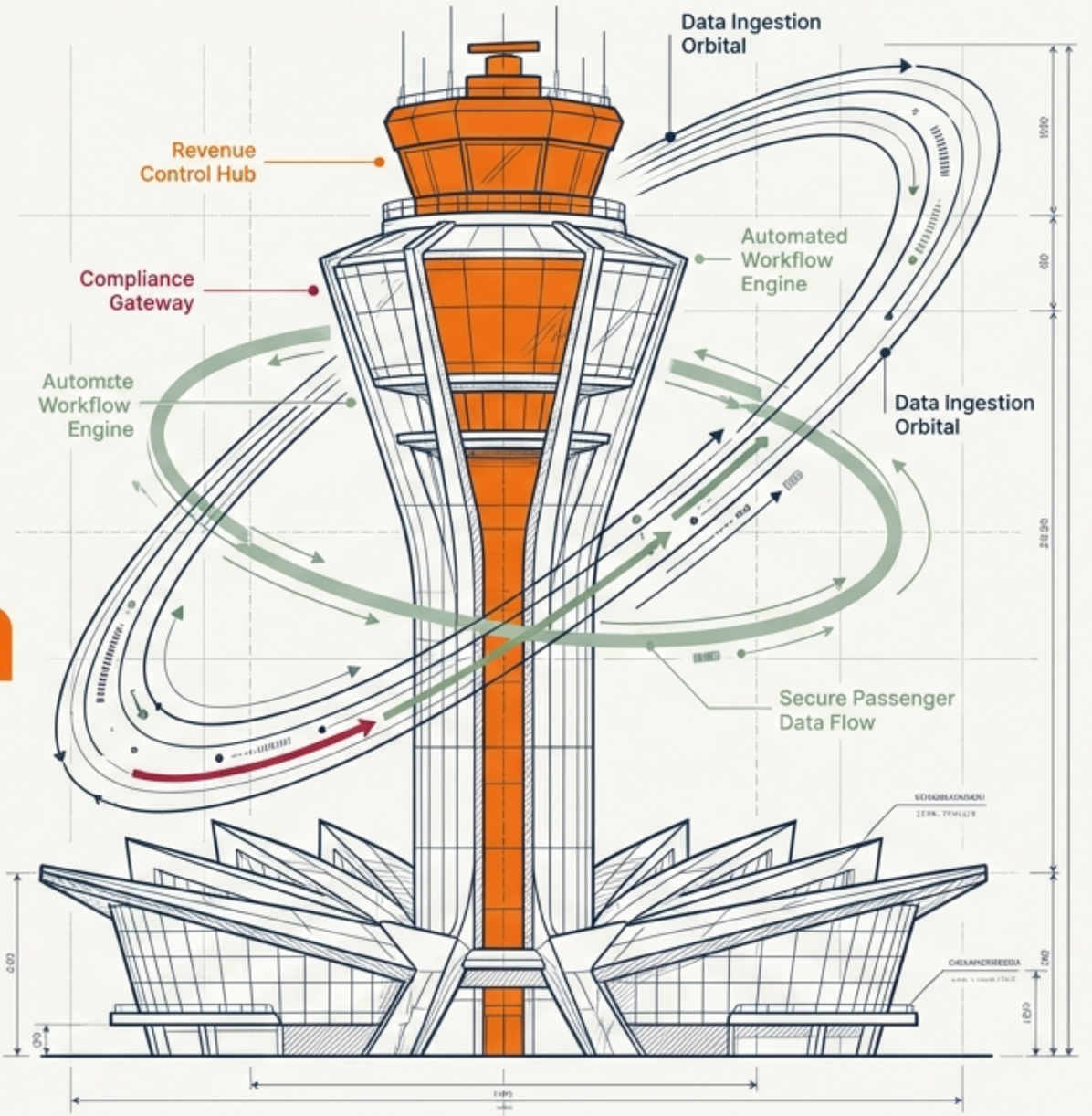
USAEV Core Travel Sales Academy Day 9

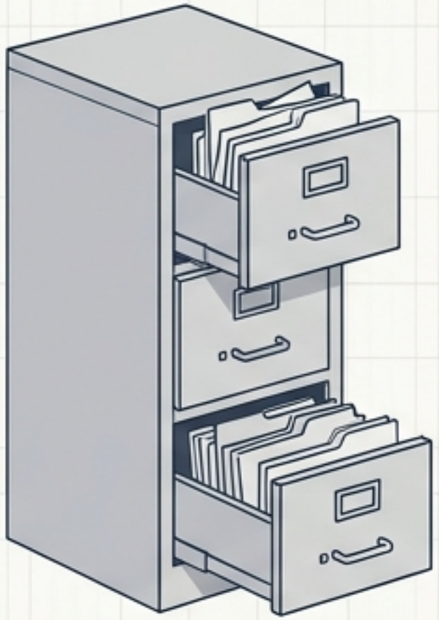
Travel Dakdan GoHighLevel: The Revenue Operating System

Constructing the digital control tower for compliant, automated travel sales.



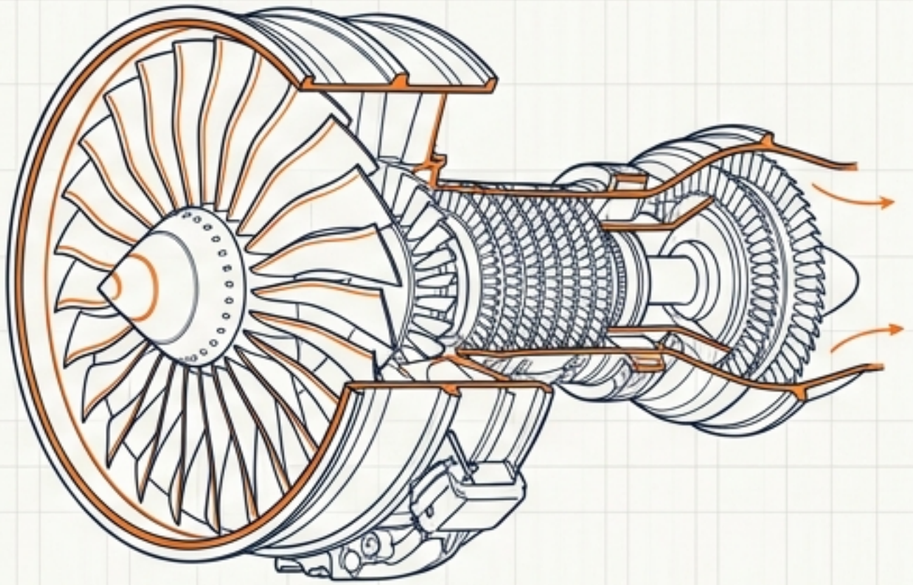
Gemini Notebook

Travel Dakdan is Not a Database. It is Your Revenue Engine.



The Database Trap (Order-Takers)

Passive storage
Administrative burden
Manual retrieval
Reactive follow-ups



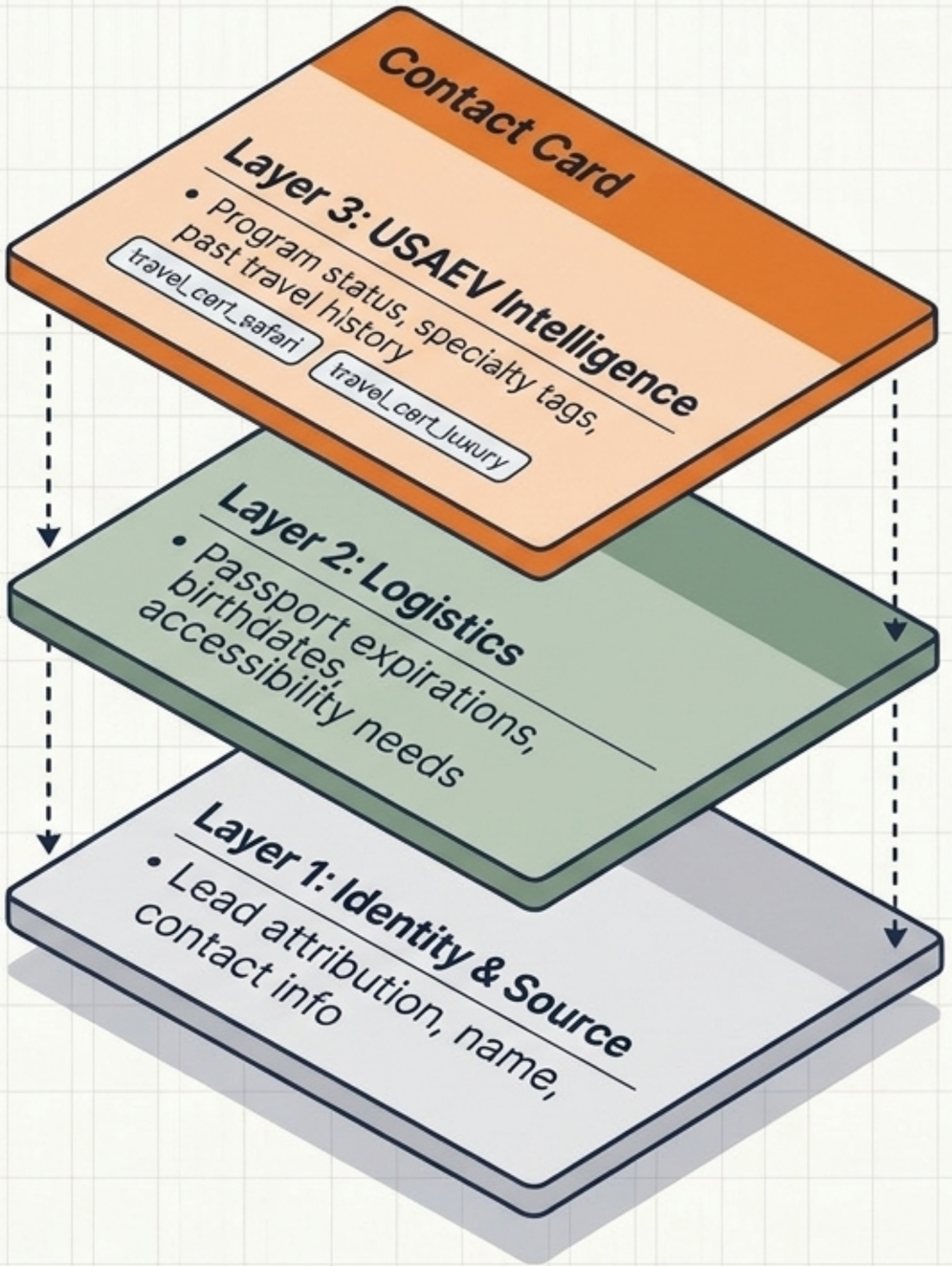
The Revenue Operating System (Sales Professionals)

Active logic
Automated task triggers
Predictive follow-ups
Scalable booking architecture

Gemini Notebook

Constructing the Complete Traveler DNA Profile

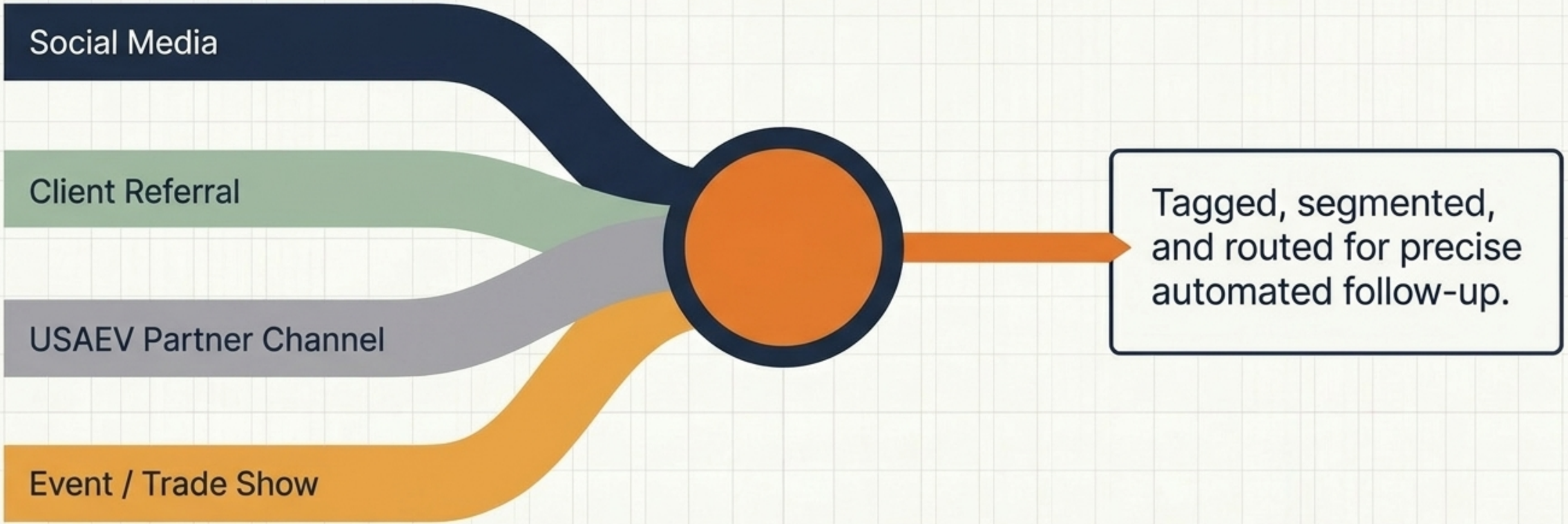
The engine cannot process corrupted fuel. A pipeline is only as as powerful as the data mapped to its foundational fields.



Gemini Notebook

Tracking the Genesis of Every Opportunity

You cannot scale what you do not measure. Lead source attribution dictates future marketing spend.



Gemini Notebook

The Anatomy of a USAEV Deal: Lifecycle Stages



Key Insight: Opportunities must maintain velocity. A card resting in a stage is not an update; it is a countdown to stagnation.

Gemini Notebook

Keeping the Engine Clean: Pipeline Hygiene

The Golden Rule: Every open opportunity must have a scheduled Next Action.

The Diagnostic Checklist

1. Are the notes timestamped?
2. Are supplier quotes attached?
3. Is the next contact date set?

✓ Timestamps complete, quotes attached, Next Action scheduled.

⚠ Stale proposal, missing internal notes.

⚠ Zero future tasks assigned.

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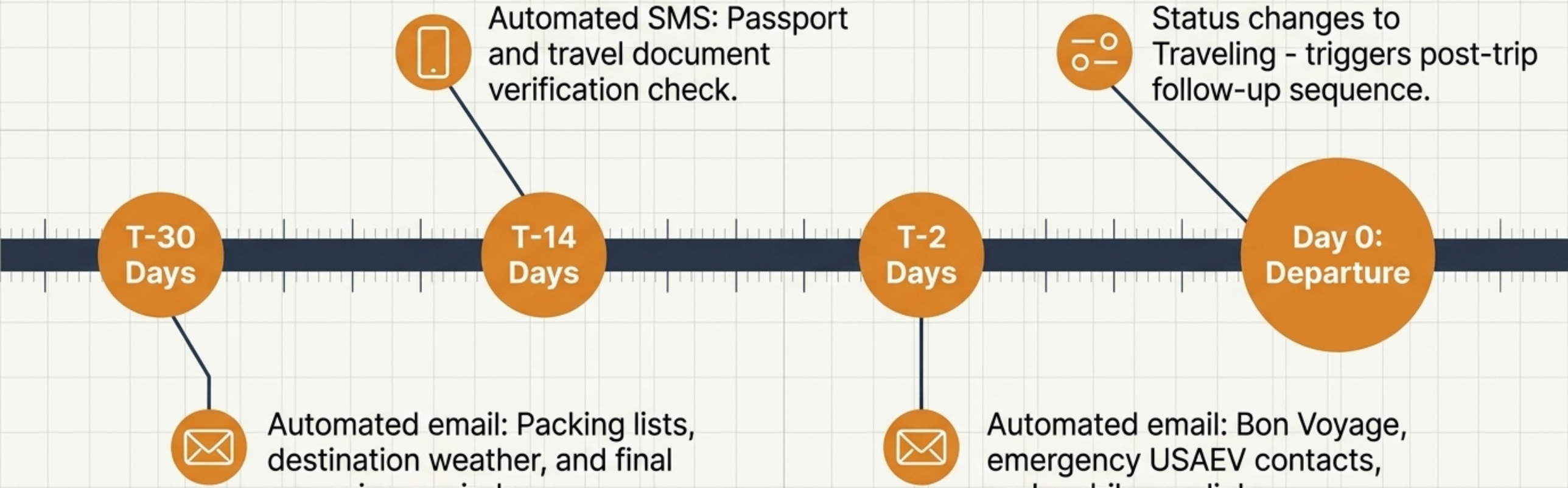
The Invisible Assistant: Automated Workflow Triggers

IF: Stage changes to Discovery Complete	**THEN:** Trigger Supplier Research Task for Advisor
IF: Stage = Proposal Sent AND 72 hours pass without reply	**THEN:** Trigger Automated Value Follow-Up Email
IF: Tag added = travel_cert_safari	**THEN:** Route to specialized Safari nurture sequence

Gemini Notebook

Automating the Anticipation: The Pre-Trip Countdown

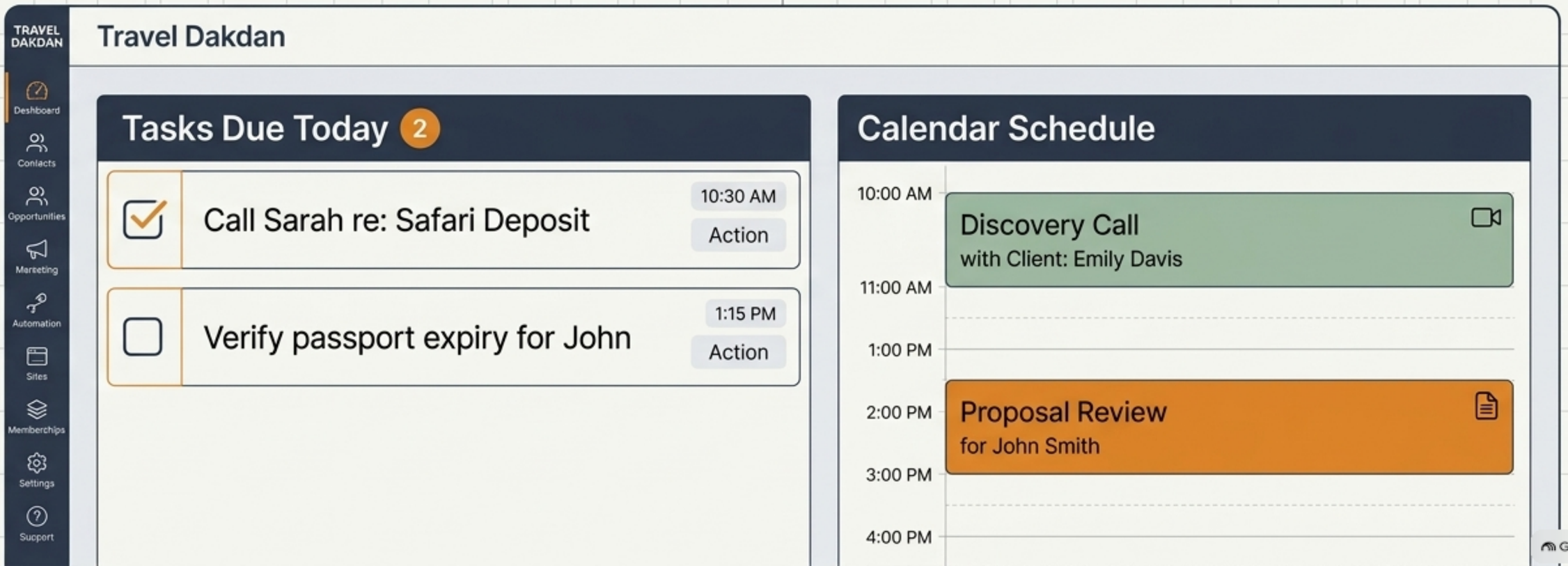
Extreme loyalty generated with zero daily administrative effort.



Gemini Notebook

The Command Center: Your Daily Sales Cadence

Operate out of the GoHighLevel dashboard, not your email inbox. Calendar syncs— and automated task reminders dictate your daily priority protocol.



Gemini Notebook

The Cost of Friction vs. The Power of Flow

Manual Friction	Travel Dakdan Flow
✗ Relying on post-it notes and memory.	✓ Calendar-synced, prioritized daily task lists.
✗ Forgetting critical 10-year passport expirations.	✓ Automated document expiry alerts.
✗ Manually typing every follow-up email.	✓ Sequence-driven, timely prospect follow-ups.
✗ Reacting to client anxiety and supplier deadlines.	✓ Proactive, scheduled pre-trip nurture.

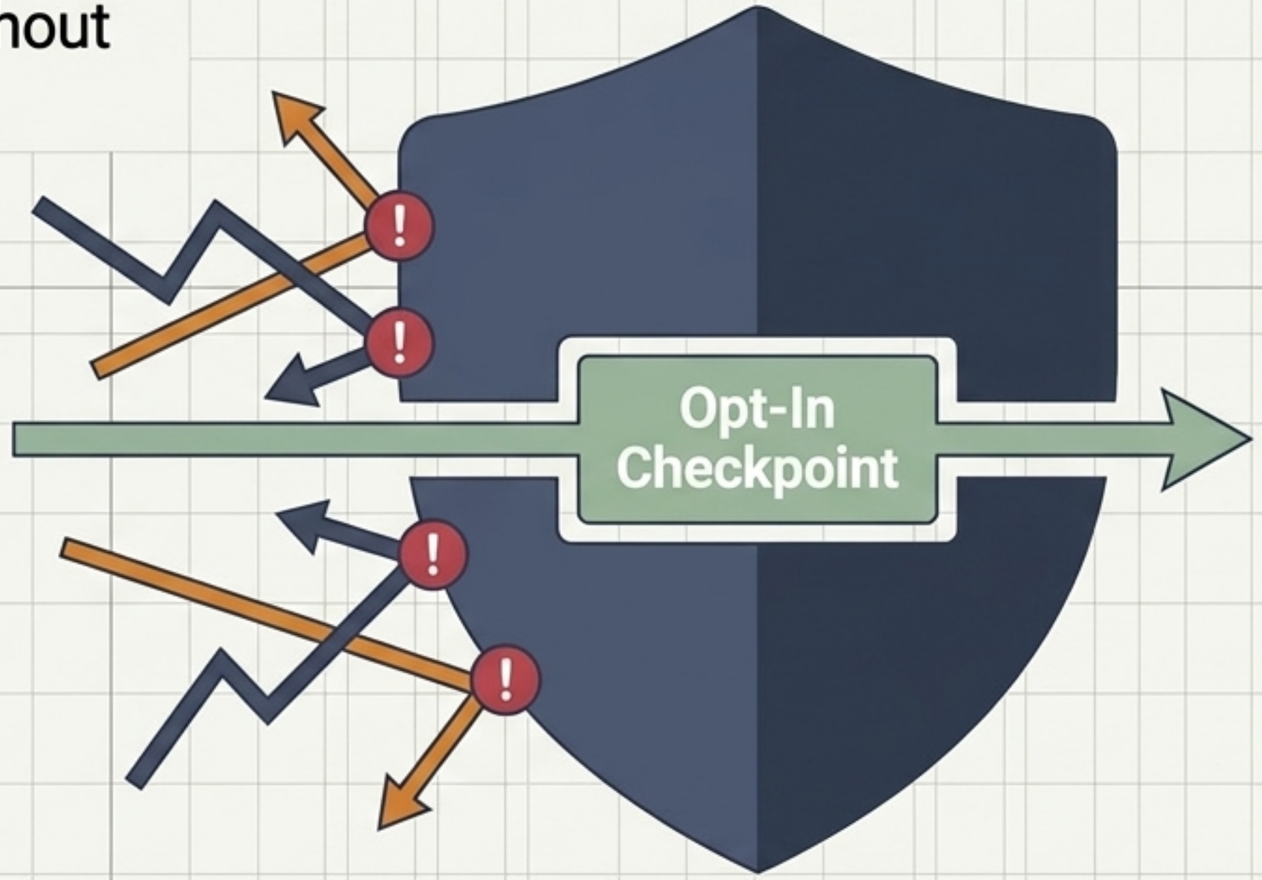
Gemini Notebook

Protecting the Pipeline: TCPA Marketing Consent

You cannot market to a prospect without explicitly documented permission.

Guardrails:

- Mandatory Opt-In rules for SMS and Email.
- Rigid segmentation of contact lists.
- Clear, automated opt-out mechanisms embedded in all sequences.



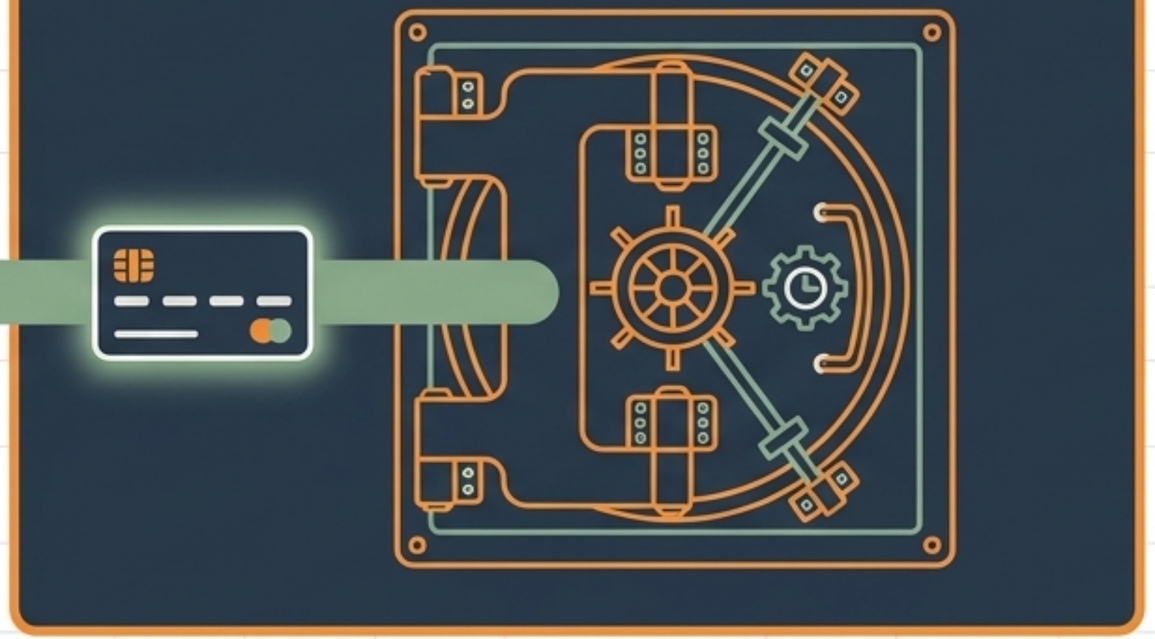
Gemini Notebook

Zero Tolerance: PCI Payment Security

The Open Floor (CRM Notes & Fields)



The Vault (Secure Approved Gateway)



Critical Rule: NEVER type a client's credit card number, CVV, or expiration date into a CRM note, custom field, task, or email.

Protocol: All payment credentials must be processed exclusively through USAEV-approved secure gateways and encrypted supplier portals.

Gemini Notebook

The 3-Point Rubric for CRM Mastery

01 / Lifecycle Correctness

Zero mixed stages. The opportunity accurately reflects the precise reality of the deal.



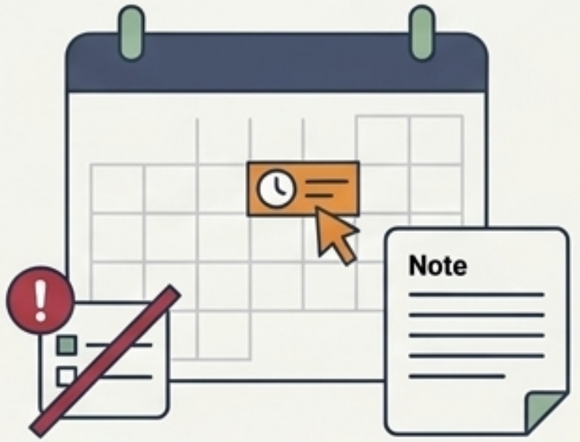
02 / Data Completeness

100% fill-rate on required fields. Exact source attribution. All supplier quotes securely attached.



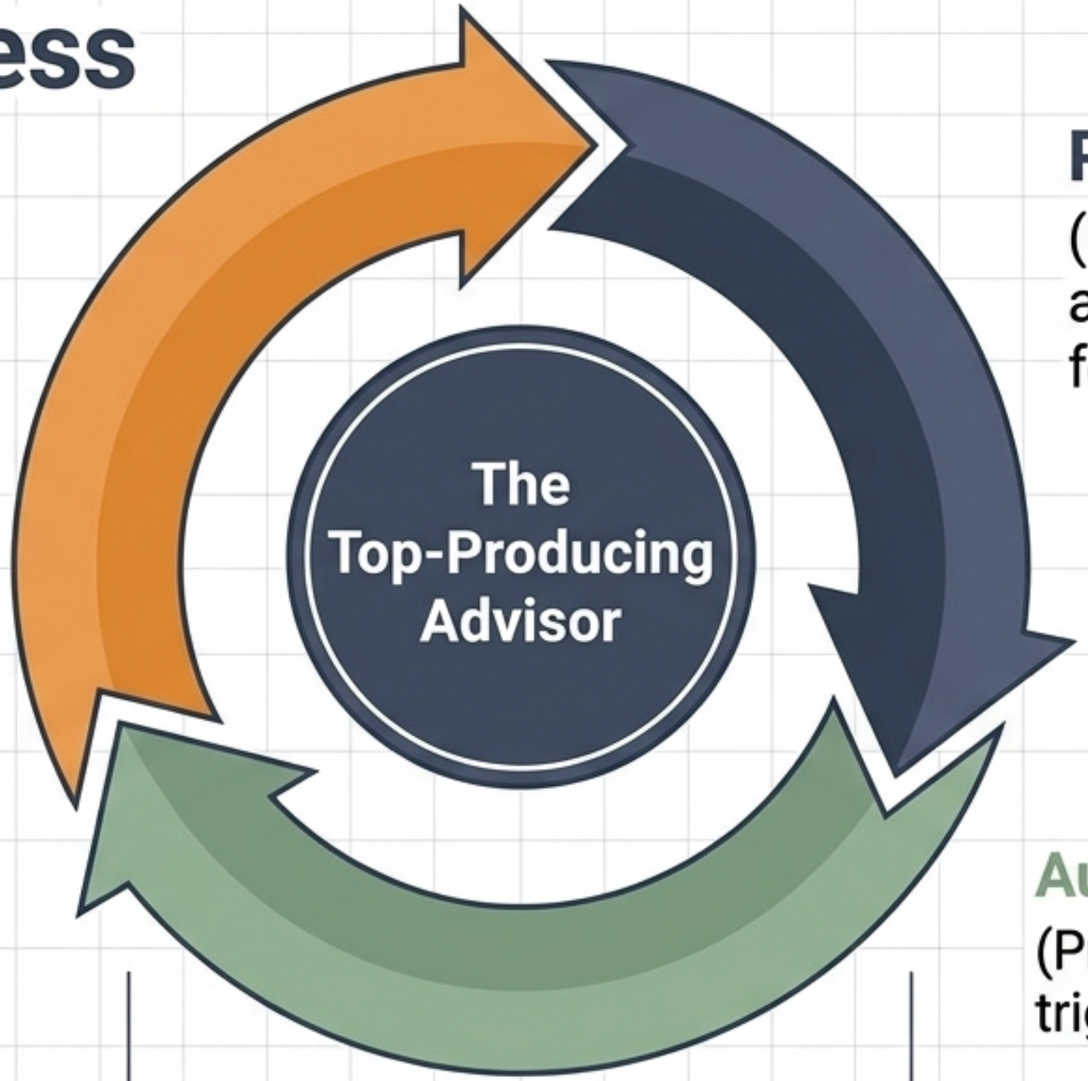
03 / Actionability

Crystal-clear chronological notes. Zero open opportunities lacking a future, date-stamped Task.



Gemini Notebook

Synthesis: The Frictionless Flywheel



Pristine Data
(Mapped fields and accurate attribution) feeds into...

Automated Workflows
(Pre-trip sequences and task triggers), which generate...

Secure Revenue
(PCI/TCPA compliant bookings), which loops back to create Repeat/Referral Data.

Gemini Notebook

Enter the Simulation

The control tower is yours.
Begin your Day 9 CRM Practical.

Your Mission:

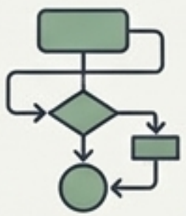
1. Log a full simulated opportunity.



2. Map the Traveler DNA fields.



3. Advance the pipeline with perfect hygiene.



4. Trigger the sequence.



The Activation:



Scan to access the GoHighLevel Training Sandbox.

Gemini Notebook