



# WALT DISNEY WORLD BOOKING PROCESS CHECKLIST

EverSail Travel • Agent Training & Workflow Reference

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Use this checklist to guide clients proactively through booking, dining and Lightning Lane windows, final payment, trip preparation, and post-vacation follow-up.

#### 1. Book the Reservation & Send the Vacation Guide

**When:** your client is ready to book

- Book the client's Walt Disney World vacation in DTA, then send the appropriate vacation guide.
- Collect guest first and last names, titles, ages, billing address, client phone number, and My Disney Experience email/login information.
- Confirm whether the client wants vacation protection at booking.
- Collect credit card information needed for the deposit.

#### 2. Watch for New Promotions & Apply Eligible Savings

**When:** anytime between booking and travel

- Watch for Disney promotions communicated to travel advisors.

- If an offer applies: retrieve the reservation in DTA → modify the reservation → apply the eligible promotion → complete checkout to secure the new pricing.
  - Notify the client promptly and explain the savings.
  - If an existing reservation requires a phone call to apply the offer, contact the appropriate advisor support/agency line and complete the promotion update.
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### 3. Make Dining & Enchanting Extras Reservations

**When:** 60 days before check-in

- Obtain the client's My Disney Experience login information ahead of the booking window.
  - Make table-service dining and eligible Enchanting Extras reservations through the My Disney Experience app.
  - For eligible Disney Resort stays, dining reservations open at 6:00 AM Eastern Time, 60 days before check-in, with the applicable stay window.
  - Prioritize the client's must-have dining and experiences first, then complete the remaining itinerary.
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### 4. Process the Client's Final Payment

**When:** 30 days before check-in for vacation packages

- Reach out about 10 days before the final-payment deadline to gather payment information.
- Send a follow-up by text or email if you do not hear back.
- Retrieve the reservation in DTA and process the final payment.
- After payment, confirm the reservation is fully paid and note any remaining client action items.

**EverSail Agent Tip:** Add each dining, promotion, payment, MagicBand+, and Lightning Lane deadline to your follow-up calendar as soon as the vacation is booked.

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### 5. Remind Clients About MagicBand+

**When:** at least 12 days before check-in

- If the client wants MagicBand+, remind them to purchase/order it in time.
- This is a convenient reminder to include when processing final payment.
- Confirm the client understands that MagicBand+ is optional and separate from park admission.

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## 6. Prepare Clients for Lightning Lane Planning

**When:** about 10 days before check-in

- Review the client's Lightning Lane options and explain the applicable advance-purchase/reservation windows for their trip.
- If they plan to purchase Lightning Lane options, remind them exactly when they can do so.
- Share Lightning Lane Multi Pass strategies and explain how the system works in the parks.
- Share the EverSail Lightning Lane guide or approved training resource.

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## 7. Send a Final Lightning Lane Reminder

**When:** about 3 days before the client's Lightning Lane date

- Send a final reminder with the exact date and time the client can purchase Lightning Lane options.
- For eligible Disney Resort guests, confirm the applicable advance-purchase window for their stay.
- For guests staying off property, remind them of the applicable purchase window based on their first ticketed park day.
- Include any strategy notes or links the client needs to act quickly.

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## 8. Final Consultation & Post-Vacation Follow-Up

**When:** final consultation about 5–6 days before check-in; follow up on check-out day

- **Final consultation:** Connect by phone, text, or email; answer last-minute questions and confirm the client feels prepared.
- Review outstanding details, including reservations, park plans, transportation, and any room requests.
- **After the trip:** Check in with the client, ask about their experience, and share the EverSail Google review link.
- Ask what they would like to book next and continue the client relationship.

**EverSail Travel Standard:** Guide clients proactively through booking, dining and Lightning Lane windows, final payment, trip preparation, and post-vacation follow-up.