

DWHSAs Master Class: Breaking Down the Destination Wedding Workflow

(September 30, 2025)

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**Destination weddings can be like doughnuts.
You need an assembly line to churn them out.**



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9 to 12 Months Ahead

[This timeline assumes you already have DW leads to work with.]

Collect information from the prospects about their DW dreams and needs.

Give them a questionnaire and ask what they've researched so far.

Try to get answers from both members of the couple (as well as any other "decision makers" who may be paying for the trip).

Create a DW questionnaire form in advance that you can give couples. (DWHSA has samples in the Resource Center inside DWHSAMembers.com.)

- **Ask your web site company if it allows you to create forms on your site.**
- **Use a form builder service such as Jotform.com or Google Forms.**

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14. What kind of destination wedding are you looking for? Do you want a quiet location or good beach and ocean water or do you want a destination that offers many sightseeing trips?

15. Ceremony - Would you like sunset, beach, tropical garden? What are your thoughts?

16. Do you require a certain wedding custom? _____

17. Is the ceremony time or time of day important to you? _____

18. Did you want a location that can provide you with a formal or private wedding dinner setup?

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9 to 12 Months Ahead

Schedule a consultation to discuss the DW plans with the couple (in person, via phone, using Zoom, etc.).

Ask follow-up questions based on what you've learned so far – and answer any questions about how the processes of a destination wedding work.

Check specifically for an estimated guest count, preferred ceremony venue and traditions, and budget levels.

Use a calendar program to allow couples to request appointments with you:

- [Calendly.com](https://calendly.com)
- AcuityScheduling.com
- Appointlet.com

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Groups & Celebrations - New Trips

Destination Wedding: Complimentary Planning Session
1 hour

Book

Schedule your complimentary one-on-one session with your very own Certified Destination Wedding Specialist. Discover all the options available to make your wedding fabulous and stress-free. This includes South Asian, Jewish, Catholic, and Cruise destination weddings.

Celebration Groups (5 rooms or more) Birthdays, Bachelor & Bachelorette Parties etc.
30 minutes

Book

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9 to 12 Months Ahead

Give the couple your client agreement/plan-to-go agreement and answer any questions about it.

If you require a signed agreement before you begin work on the DW proposal, explain how that works (and make sure the clients receive a copy of the signed agreement).

And, if you charge any fees (especially for helping plan the DW ceremony and/or accompanying the DW group on site), explain those as well and work with the couple to collect those fees now.

Create a template for your client agreement that you can reuse with different couples. DWHSAs has samples inside DWHSAMembers.com, and we have a Client Agreement Kit developed with the help of attorneys (USD\$75).

- Paper forms/your CRM
- Docusign
- DocHub
- HelloSign
- Square

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DESTINATION WEDDING PLANNING SERVICES AGREEMENT

This Contract for Destination Wedding Planning Services is made effective as of November 20th, 2022, by and between Bride and Groom of 3804 Southern Ave, Baltimore, MD 21206 (the "Recipient"), and Esprit Errant Travel LLC of 8508 Park Road #245, Charlotte, North Carolina 28210 (the "Provider").

1. **DESCRIPTION OF SERVICES.** Beginning on November 20th, 2022, Esprit Errant Travel LLC will provide Shannon N. Price and Theodore N. Stewart the services described in the attached Exhibit (collectively, the "Services").

LIST OF SERVICES

JARDIN ROSERIE DU LUXE PACKAGE: \$4000+ plus all travel and lodging costs

50% Deposit due at contract signing 25% Due during wedding planning Final 25% Due 45 days before Wedding Travel Date. Travel to be booked no less than 3 months in advance of travel date

JARDIN ROSERIE DU LUXE PACKAGE DESTINATION WEDDING PACKAGE INCLUDES:

- Unlimited Customized Venue Proposals- We will expertly match you to the right resort and/or Venue for your wedding!

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9 to 12 Months Ahead

Begin researching DW trip options for the proposal/quote (including DW packages [free or paid] offered by those suppliers).

Check the clients' travel dates with suppliers for lodging and ceremony venue availability. Also, check any conflict with the destination's local/national holidays, the distance from the airports to the resorts or ports, weather patterns for that time of year, high/low tourism seasons, and desired resort/ship amenities.

Collect in advance the DW packages offered by your preferred resort companies so you can review and learn them.

Check holidays for any destination at timeanddate.com/holidays.

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Inspirations are completed with

Ceremony

Personalized service from an onsite Romance Event Planner
 Location for the ceremony including Setup of wedding venue
 Choice of 3 complimentary services to choose from the below:
 Officiant for Symbolic Ceremony
 Recorded music and microphone provided for the ceremony
 Sparkling wine served after the ceremony
 Classic white frosted wedding cake
 Dinner reservation in one of the a la carte restaurant for 12 guests (when not having a private reception)

Personal Flowers for the wedding couple matching inspiration

Reception

Location for 3 hours with inspiration décor set up
 Plated 3 course menu or buffet style menu (3 stations)
 National open bar included for 3 hours

Added values:

Upgrade to the next category of room for the couple (subject to availability, Presidential Suite is excluded from upgrades)
 Complimentary Late check out for couple (subject to availability)
 10% discount on spa services for wedding guests (boutique purchases excluded)
 Welcome and In - Stay amenities for the wedding couple

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9 to 12 Months Ahead

Prepare the DW proposal/quote (using tools such as Adobe Express, MS Word or PowerPoint, Travefy, etc.).

Include a mix of options (usually three choices) along with any pricing/deposit information and disclaimers.

Try to include maps of the resorts, photos, room/cabin and DW venue descriptions, and your contact information.

Follow up with the couple to lock down the final choice.

Use DWHSA's PowerPoint template for proposals – or create your own template that you can reuse with different couples:

- **Travefy, AXUS, or other itinerary builders**
- **Adobe Express (formerly Adobe Spark)**
- **MS PowerPoint or Google Slides**

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Destination Wedding Options in Jamaica for Jim and Sally Kane

Created by ABC Romance Travel

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9 to 12 Months Ahead

Once the clients have made a final choice, decide which method works better for your couple: a contracted room block or a flexible group booking code.

Request the appropriate contract from the supplier and get it signed. (If the agreement is between the supplier and your agency, sign it but pull language from it to create a separate contract between the couple and you so that the couple assumes liability for the room block.)

Typically, you'll see two contracts: the wedding date contract and the room/cabin group block contract.

(Work with your contacts at the tour operator, resort, cruise line, or DMC.)

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9 to 12 Months Ahead

Lock in the couple's wedding dates, times, venues, and ceremony package with the supplier and handle any required deposits from the couple.

Ask the supplier about "Plan B" options if issues arise with the couple's first choices (e.g., bad weather).

Confirm whether the supplier pays commissions on ceremony packages.

(Follow the standard booking procedures used by your chosen suppliers.)

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9 to 12 Months Ahead

Book the couple's travel (including any requests for the location of their room/cabin) plus transfers and airline tickets (if you handle air for clients).

Regarding air, check requested seat assignments, special inflight meals, checked and carry-on bag requirements, luggage fees, etc.

Discuss and recommend travel insurance options for the couple (as well as wedding insurance if appropriate).

(Follow the standard booking procedures used by your chosen suppliers.)

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9 to 12 Months Ahead

Ask your clients if they'd like to do a "preview" trip – traveling to the resort, ship, or destination now to inspect things and meet in person with the on-site wedding coordinator.

(Now's also a great time to set up a master file/binder and a "to do" timeline for the DW so you can collect completed forms and correspondence for the couple and their guests in one place.)

Check with the supplier to see if it offers DW preview trips (or, set up this type of trip from scratch for them).

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3 to 9 Months Ahead

Help the couple create a DW registry if they wish (using tools such as HoneymoonWishes.com). Explain how the registry works, the fees involved, and their options for withdrawing or spending the collected funds.

(Because presents from DW guests are not required by current etiquette standards, it's much more common to see couples set up a honeymoon registry instead.)

Select a DW registry company (e.g., Honeymoon Wishes, Honeyfund). If possible, create a template for your clients' registries that features your company name and logo.

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3 to 9 Months Ahead

Ask the couple to share a copy of the full guest list with contact information (phone numbers and email addresses) so you can follow up once the DW trip details have been sent out.

Ask the couple specifically about any special relationships or issues you should know about (e.g., divorced parents who're bringing "plus ones" and who'll need rooms far apart from each other).

Use your CRM or another database tool to keep track of each couple's DW guest list.

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3 to 9 Months Ahead

Before trip details are sent out, decide in advance how you'll handle tasks such as price matching requests, frequent name changes, frequent flyer numbers and award ticket redemptions, etc.

Also, decide if you'll charge the DW guests any service fees – and, if so, create a fee list that explains the charges.

Plus, check on day passes (both the pricing and the daily capacity limits) and other charges that may apply to DW guests who don't book within the couple's room block.

Create a list of service fees that shows the prices and the services included in each charge.

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3 to 9 Months Ahead

Help the couple set up their wedding web sites (in many cases, couples will handle this task themselves, but they may ask your advice).

Ask for one page on the site to include trip details and provide those details to the couple (including an itinerary with room/cabin category descriptions, pricing, your contact information, and links to any online booking forms you'll use). Make sure those forms are PCI compliant if you plan to take debit/credit card payments on them.

Get familiar with popular wedding web site options that you can recommend to your couples:

- **AppyCouple.com** (this service includes the wedding site plus a mobile app version and digital invitations for USD\$99)
- **WithJoy.com**
- **WedSites.com**
- **Plus many others (including Zola, TheKnot, and Minted.com)**

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3 to 9 Months Ahead

As your couples set up their wedding web sites, they should take responsibility for designing and ordering their "save the date" cards, wedding invitations, and other printed materials. They may ask your advice, and they may need your help if they plan to include links to the travel page on their sites in any of these printed materials.

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3 to 9 Months Ahead

Begin processing reservations from the DW guests, take their initial deposits, and send receipts/confirmations. Give them the due dates for remaining payments (and "pad" those dates by a few weeks in case a credit card doesn't work on time). Along with payment confirmations, make sure you send the guests the DW itinerary, any disclosure/disclaimer notices you use, a checklist of trip tips such as passport validity dates, the need for correct name spelling on government IDs and reservations, COVID-19 issues, cancellation policies, etc. Recommend travel insurance (and collect signed waivers if they decline insurance). And, enter these new clients into your CRM/database right away.

Create an email template to give couples their due dates and remaining payment amounts.

Use an itinerary builder such as Travefy or AXUS to create individual itineraries for each couple.

Create a tipsheet listing passport tips, cancellation policies, etc.

ALWAYS use travel insurance waiver forms.

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TRAVEL DETAILS CONFIRMATION SHEET

Behind the scenes, we're juggling many moving parts to make your trip happen! That's why we're asking your help to check the important details within your travel plans. Please review your travel documents, your itinerary, and the other materials we've given you for your trip, answer the questions below for yourself, and contact us if you have any questions. Thanks so much for your help!

THE BASIC TRIP DETAILS

Did we spell your name correctly on every travel document we gave you (e.g., airline ticket, hotel/resort/cruise reservation)?

Does your name as shown match your legal name as it appears on the valid government-issued form of ID that you plan to use at the airport or cruise port? (Remember: The ID you plan to present must be currently valid, and your name shown on the ID must match exactly your name as shown on the air/hotel/cruise documents.)

Is your date of birth correct (as it appears on your airline reservation, for example)?

Did you receive from us a COMPLETE itinerary for your trip – showing flight dates/times and airport names, departure/arrival city information, and hotel/resort/cruise dates?

INTERNATIONAL TRAVEL

We recommend generally that **U.S./Canadian** citizens traveling outside the country have a passport that's valid for at least six months after the date of your return home.

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3 to 9 Months Ahead

Note the confirmed guests' due dates for interim and final payments on your own calendar so you can invoice them or follow up as needed.

Use Trello board or your own work calendar (e.g., your CRM) to give yourself early prompts for each couple's interim and final payments – and pad those dates!

Create a standard invoice form (or use your CRM's invoice system to set up a template) that can be reused with different couples.

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3 to 9 Months Ahead

Introduce the couple to the on-site wedding coordinator. If you usually help plan the DW ceremonies with clients, stay in touch with the couple and the coordinator as they discuss ceremony details. But, if you don't get involved with ceremony planning, ask the couple to keep you posted on their discussions with the coordinator (especially if they have trouble communicating).

If your clients plan to use outside/off-site vendors, ask the supplier about the rules and fees in these situations and communicate those to the couple.

Consider charging service fees to help your couples plan their DW ceremonies. (And, complete DWHSA's new "Destination Wedding Ceremony Planner" certification course!)

Also, think about offering "escorting" services where you accompany DW groups on their trips to help on site (for extra fees of course).

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3 to 9 Months Ahead

If your couple wants a lawfully binding ceremony in the destination, help them confirm the rules that apply (e.g., ask the tourism office for the latest requirements).

Help them make any arrangements with the help of the supplier (e.g., blood tests in Mexico, marriage license fees). But, make sure you confirm with them that they are primarily responsible for ensuring that they're meeting all requirements for a lawfully binding ceremony.

Follow these the same steps if they want a religiously compliant ceremony (e.g., getting married in a Roman Catholic chapel).

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3 to 9 Months Ahead

Send the couple regular reports on the guest list compared to the deposited rooming list – who's booked the trip so far and who hasn't – so they can follow up as needed to nudge guests onto the trip if they wish (and so they know the progress they're making toward meeting room/cabin block minimums and earning perks).

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3 to 9 Months Ahead

Stay in contact with the couple AND the DW guests on a regular basis. Send them emails once every two to four weeks with trip updates, packing tips, photos of the destination/resort/ship, etc. - anything to touch base with them regularly so they're not tempted to start looking around online! Consider Zoom calls, group phone calls, and Facebook Groups as well to stay in touch.

When the DW is booked, schedule a Zoom, an in-person visit, a phone call, etc., to review the itinerary in detail with all guests who wish to listen in.

Draft a series of prewritten emails you can send DW couples every couple of weeks to stay in touch (e.g., weather patterns, a DW packing list).

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The Final 90 Days

Confirm any special needs requests (e.g., diet restrictions, mobility challenges) that the guests may have.

Do final follow-ups with guests who haven't booked yet as the room/cabin block deadline approaches.

Collect any final payments from the couple and the guests and send receipts/confirmations as needed.

Deliver final travel documents to the couple and the guests.

If you repurpose travel documents received from suppliers before you give them to clients, create a final travel documents template into which the suppliers' information can be plugged.

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The Final 90 Days

Prepare a final rooming list for the supplier (copying the couple) and release all unclaimed rooms by the attrition deadlines in the group room block contract (if applicable).

Confirm with the supplier any group amenities, perks, and bonus refunds that the couple may have earned.

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The Final 90 Days

Help the couple spend or withdraw any funds they've collected through the DW registry.

Discuss with the couple and the DW guests any excursions, activities, and special on- or off-site events and meals planned for the DW trip. (Book those ahead of time so you can earn commission wherever possible.)

Set up a reminder three months before the DW departure so that you can discuss excursions and activities with the couple and the guests. Confirm these bookings for them so that you can earn commissions. Consider vendors such as Project Expedition that allow you to create trackable "shopping lists" of excursions for your couples and guests to use.

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The screenshot displays a webpage titled "40 Tours and Activities" with a search filter set to "Keynote". A "Referral Link" button is circled in red at the top right. Below the filter, a dropdown menu is open, listing options: "Single-day Tour", "Multi-day Trip", "Cruise", "Hotel", "Ticket", "Shore Excursions", and "Private Tour". The main content area features a grid of tour cards, each with a title, image, and price. A chat button labeled "Questions? Chat with us" and "Support is online" is circled in red at the bottom right.

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The Final 90 Days

Finalize ceremony and reception plans. Reconfirm any off-site vendors. Schedule a meeting on site (after the couple's arrival) between them and the on-site coordinator.

Help the couple make arrangements for any desired welcome gifts delivered on site.

Share tips with the couple on how they should pack and transport their wedding clothes (especially the bride's gown!).

Share packing/travel tips as well with the DW guests.

Create a "before you depart" tipsheet to give clients with final instructions for getting to the airport early, contacting you/the supplies if something goes wrong on the trip, etc.

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The Final 90 Days

Share the couple's air and transfer schedule with the on-site wedding coordinator.

Send final emails to the appropriate on-site staff for any special needs/requests.

Confirm any beauty/spa/makeup appointments, especially "day of" arrangements.

Review the "day of" schedule with the couple before they depart to answer last-minute questions.

Create a "day of" checklist to remind yourself of any specific tasks and arrangements that should be made and confirmed for the couple relating to the day of the ceremony.

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The Final 90 Days

Share with the couple and the guests your emergency contact information to use while they're traveling, whether it's an after-hours call service or your special cell number. (Make sure you're available to answer calls and emails on those days!)

Confirm the couple's arrival on site with the transfer company, the on-site coordinator, or the resort/ship staff.

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After the DW

Send the couple a "welcome home" email, letter, or gift to greet them after the trip. Then, follow up with them personally to see how things went. And, ask them to share their story by giving you a copy of their favorite photo from the trip and a few sentences about it (instead of "asking for a testimonial").

Follow up on your commissions.

- **Create this "welcome home" email in advance and reuse it with future couples.**
- **Use a free survey tool (e.g., SurveyPlanet.com) to give them a post-trip survey.**
- **Create a template for asking couples to give you a testimonial (e.g., an email asking them to share their favorite photo and 2-3 sentences about it that you can share with others).**

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After the DW

Write and send any other "thank you" notes you should do.

Check with the wedding coordinator to see how things went.

Help the couple confirm and track any marriage licenses or certificates they're expecting after they return home.

Follow up on your commissions!

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Things to create/set up

(NOTE: This is a checklist of the items on previous pages.)

- Create a DW questionnaire form that you can give couples.
- Set up an appointment calendar on your web site.
- Create a client agreement template that you can customize for each couple.
- Collect details on the DW packages offered by your preferred suppliers.
- Create a DW proposal template that you can reuse for different couples.

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Things to create/set up

- Create a list of your service fees with explanations.
- Create an email template for sending clients the confirmation for their DW trip that includes remaining due dates and amounts. (Make this a checklist showing any remaining DW planning steps.)
- Select an itinerary builder company such as Travefy or AXUS.
- Create a DW booking reminder/tipsheet that covers passport/visa tips, your cancellation policies, your rules for price match requests/frequent flyer tickets, and other policies.

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Things to create/set up

- Contact your travel insurer to request language to use on a travel insurance waiver form (or get a copy of the insurer's recommended form).
- Pick a DW registry company (and create a common template or look for the registries your couples will use).
- Create a standard invoice form (probably inside your CRM) to use with DW couples and their guests.
- Draft a series of a dozen prewritten emails you can use to stay engaged with couples (e.g., a DW packing list, weather patterns in the destination).

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Things to create/set up

- Create a final travel documents template if you repurpose the supplier's documents before they're given to your clients.
- Pick an excursions vendor that will allow you to create trackable "shopping lists" for your couples to preplan their activities.
- Create a "before you depart" tipsheet for couples (e.g., stopping mail delivery, getting to the airport early).
- Create a "welcome home" email or letter.
- Use a free survey tool to get feedback on the trip.
- Create an email template for asking couples to give you a testimonial.

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Questions?

support@dwhsa.com

615.730.9977

DWHSAs Facebook group

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