

Build Your AI Travel Advisor

The Intake Questionnaire

Answer these and you'll have written 90% of your prompt. Every section maps one-to-one to a heading in the template — when you're done, paste your answers under the matching heading, smooth the sentences, and you're live.

Two rules while you answer

- 1. Be specific.** “We like good food” teaches the AI nothing. “We'll take a plastic-stool street grill over a white-tablecloth Michelin most nights” teaches it everything.
- 2. Be honest — especially about the negatives.** The places you disliked, the trips that bored you, and the arguments you've had about hotels are the highest-value data in this entire worksheet.

Print it, or answer in any notes app using the plain-text version. Budget about 45 minutes — ideally with wine, with everyone who's actually going on the trip.

SECTION A

The Trip Skeleton

Maps to template heading: WHO YOU ARE + HARD CONSTRAINTS

The fixed facts. Everything else in the prompt flexes around these.

A1 Where does the trip start, and on what date?

A2 How long is it — and is the end date fixed, soft, or open?

A3 Which dates are truly immovable?

Events, booked flights, people joining you, school starts. List each with its date.

A4 Any visa clocks or entry limits?

e.g., Schengen 90/180, UK 6-month rule. If you don't know, write "CHECK" — and make the AI verify it.

A5 Regions in play / regions out of play:

A6 What's the rough shape?

One base? A loop? A one-way arc ending somewhere specific?

SECTION B

Who's Traveling

Maps to template heading: WHO WE ARE

The AI plans for people, not passports. The tiebreaker question is the single highest-value line in the whole prompt.

B1 Who's on the trip?

Names, ages if relevant, relationships.

B2 Is anyone working during the trip?

Who, what kind of work, how many hours, and which hours of the day are locked vs. flexible.

B3 Whose schedule is LESS flexible?

This person's needs shape every base choice.

B4 When your tastes conflict — hotels, pace, aesthetics — who wins, and why?

Don't skip this. Naming a tiebreaker kills a whole category of bad recommendations.

B5 Any health, mobility, dietary, or energy realities to plan around silently?

Stairs, heat tolerance, allergies, early riser vs. night owl.

B6 Documenting the trip publicly?

If yes: does content value get a vote in destination choice — and where's the line?

SECTION C**Travel History: The Calibration Engine**

Maps to template heading: WHAT WE RESPOND TO

The most valuable section in the worksheet. Your past reactions are the training data — the WHY matters more than the place name.

C1 List 5–8 places you've LOVED — with one line each on WHY it worked.

Not “it was beautiful.” What was the mechanism? Food density? Alpine drama? Real local life? Walkability?

C2 Name 2–3 places that were nice but got BORING. How many days did each take to go stale?

That day-count is one of the most useful signals you can give an AI.

C3 Name 1–3 places you actively DISLIKED, and the honest reason.

C4 Look at your three lists. What patterns do you see?

Try finishing: “_____ beats _____ for us.” / “A place holds our attention when it has _____.” / “We always regret _____.”

C5 Places already visited that should be EXCLUDED from recommendations:

SECTION D

The Aesthetic Filter

Maps to template heading: AESTHETIC CALIBRATION

If anyone in your group has a strong visual filter, spelling it out prevents the worst category of miss: a place that's objectively great and subjectively wrong.

D1 Does anyone in the group have a strong visual filter? Whose?

D2 Describe it with examples.

Useful spectrum: maintained-old (polished stone, restored facades) vs. peeling-old (crumbling stucco, ruin chic). Which side? Any exceptions — like ancient ruins where the age IS the story?

D3 Name one real place that nails your aesthetic, and one that violates it.

SECTION E

Pace, Lodging, and Daily Life

Maps to template heading: HARD CONSTRAINTS + lodging rules

Most trip fatigue comes from getting these wrong, not from picking the wrong city.

E1 Minimum and ideal nights per base?

Be honest — do you actually enjoy moving every 3 days, or does it wreck you?

E2 Apartments or hotels as the default — and why? What must the lodging have?

Kitchen, washer, elevator, workspace, AC, quiet.

E3 What's a lodging dealbreaker you've actually hit before?

E4 Luggage reality: checked bags or carry-on only? How many bags total?

E5 Connectivity floor and time-zone limits:

What Wi-Fi speed do you genuinely need? Can you tolerate a base without it? Any call-hour constraints?

E6 Describe your ideal ordinary day on this trip — morning to night.

This one question teaches the AI more about pacing than any list of rules.

SECTION F**Food & Experiences**

Maps to template heading: WHAT WE RESPOND TO — the pattern rules

This is where the AI learns whether to lead with restaurants, landscapes, or moments.

F1 Where does food rank among your selection filters?

The lead, a strong supporting layer, or background?

F2 Street food / hole-in-the-wall vs. fine dining — your honest mix:**F3 The single best meal of your traveling life, and what made it great:****F4 What experience types are worth planning a whole leg around?**

Natural spectacle, hikes, dive sites, music scenes, wine regions, markets, once-only events.

F5 What do other travelers love that does NOTHING for you?

Museums? Beaches? Nightlife? Guided tours?

SECTION G

Money

Maps to template heading: BUDGET FRAMEWORK

A rhythm plus a splurge protocol beats a hard cap. Give the AI both the number and the philosophy.

G1 Monthly all-in rhythm (and what's excluded):

Lodging, food, local transport, experiences. Exclusions might be long-haul flights or one-off events.

G2 Which splurge categories are pre-authorized?

Once-in-a-trip lodging, hard-to-repeat experiences, escaping bad weather, family segments.

G3 What's the splurge ceiling before the AI should stop and ask?

G4 What spending genuinely annoys you even when you can afford it?

Tourist-trap luxury? Peak-season prices? Bad-value fine dining?

SECTION H

Getting Around

Maps to template heading: HARD CONSTRAINTS + transport philosophy

Transport preferences quietly determine your entire map. Cheap flights make the continent denser; hard rules make it smaller.

H1 Budget airlines: a feature, a tolerable evil, or a no?

H2 Trains and ferries: default when reasonable, or only when clearly better?

H3 Will you rent cars? Anyone unwilling to drive abroad?

H4 Any transport hard rules?

No 5am departures, no triple connections, full-service carriers for certain legs.

SECTION I

How You Want It To Talk To You

Maps to template heading: TONE + HOW TO THINK

Same advisor, different personality settings. Decide these on purpose instead of discovering your annoyances one chat at a time.

I1 Decisive single recommendations, or a menu of 2–3 options you pick from?

I2 How much pushback when it disagrees with your plan?

None, gentle, or full contact.

I3 Locked itineraries or a living menu of next-moves?

If your dates are mostly soft, say so — “offer, don't dictate” is a powerful instruction.

I4 Pet peeves in how AI or guidebooks talk?

Hedging, brochure language, over-formatting, burying the answer.

SECTION J

The Privacy Line

Maps to template heading: (for you — not for the prompt)

Decide now what never leaves your private version, so it can't leak into one you share later.

J1 What goes in your PRIVATE version only?

Medical, financial, contacts, security details, home-empty dates.

J2 If you share your prompt later, what gets replaced with [BRACKETS]?

FINAL ASSEMBLY

From Answers to Advisor — 10 Minutes

- 1. Paste.** Open the template. Move each section's answers under its matching heading — the “maps to” label at the top of every section tells you exactly where.
- 2. Smooth.** Turn fragments into sentences, but keep your own voice — the AI calibrates to how you talk.
- 3. Add the evolution rule, verbatim:** “Treat our preferences as hypotheses being tested through experience — not laws. Don't convert one data point into a permanent rule.”
- 4. Pin it.** Save it as project instructions so every new chat starts fully calibrated.
- 5. Feed it.** Report back after every place — one sentence per verdict. The feedback loop, not the prompt, is what makes it good.

A shortcut worth knowing

You can also hand your raw answers straight to the AI: “Here's a completed intake questionnaire. Draft my travel-advisor project instructions from it, using this template structure.” It will assemble the prompt for you — then read the result carefully and correct anything it got wrong. Fitting, really: the advisor writes its own job description.

@HomeFreeCEO — a 55-year-old CEO who sold everything and runs his company from the road. Also on @gearfocus and @billpyornow.