



CAN\|DID

A Step-by-Step Playbook for Safari Guides Leaving a Lodge and Building Their Own Company

This playbook is designed for professional safari guides transitioning from lodge employment into a hybrid role: private guide, travel advisor, and travel company owner. It prioritises ethical exits, guest trust, operational competence, and long-term sustainability.

Before we get started you must understand one thing. We live in the era where “I don’t know how to do that” is simply not an acceptable approach. Everything you need to know is online, YouTube tutorials can cover every aspect of starting a business. So be proactive, type it in and educate yourself with the limitless knowledge available to us for free online!

Stage 1: Foundations & Ethics

- Understand your employment contract in detail, including restraint of trade, non-solicitation, and confidentiality clauses.
- Clarify your intended business model: hybrid advisor, agent, and private guide.
- Create a personal ethics framework to protect guest data and lodge relationships. Your reputation is your primary asset — protect it at all costs.

Stage 2: Building a Guest Pipeline Before You Leave

- Establish a personal brand independent of lodge systems (social media, newsletter, landing page).
- Create ethical opt-in pathways for guests who want to stay in touch. Best way is to take photos of the guests on safari, the wildlife and offer to send it all to them via email. Also ask if you

can post the photos and if they want to be tagged, usually they say yes.

- Collect testimonials, imagery, and stories while still actively guiding.
- Define 3 signature safari offerings based on destinations you know deeply.

Stage 3: Business Setup (South Africa)

- **Register a legal entity** (usually a Pty Ltd). See <https://www.govchain.co.za/> - this site makes it soooo easy!
- **Open dedicated business bank accounts.** You will likely need Forex account to deal in Euro, USD and Pounds Sterling. Go to FNB, talk to a manger and they will sort it all out for you. You need a registered business first.
- **Register for tax and understand VAT thresholds.** Employ an accountant for this if you are struggling. Ask around, there are accountants in every neighbourhood!
- Engage an accountant before taking deposits. Have all the above ready before
- Set up professional email, cloud storage, and password security. See this Youtube video, it will help with this



Stage 4: Supplier & Ground Handler Network

- **Identify trusted ground handlers and destination management companies(DMC).** If you don't have any, your best bet is to work for an already established company, like us, and establish a good and reliable network of suppliers over time.
- **Vet suppliers using reliability, transparency, and guest experience criteria.** Again, if unsure, consult with or team up with an already established company. You can run your trips through them, usually splitting the commission 50/50, whilst you develop your own portfolio and reputation.
- **Limit your initial destination portfolio to regions you can sell confidently.**
- Document all supplier terms, payment schedules, and cancellation policies.

Stage 5: Operational Systems

- Adopt an itinerary builder (e.g. Safari Portal). You may use CANVA in the beginning as it is free, but it is a lot of work!
- Use a CRM or structured spreadsheet to track leads and bookings. See Google Drive section below...
- Standardise your Google Drive folder structure for every client. See below...
- Create a booking SOP and follow it for every enquiry. See below...

Stage 6: Website & Sales Infrastructure

- **Build a simple, trust-driven website (not a complex one).** If you don't know how or don't have the content, get in touch with the CAN/DID team for help hello@candidacademy.org
- **Focus on credibility: real images, testimonials, and your guiding background.**

- Clearly communicate payment terms, cancellation policies, and expectations.
- Use lead capture tools such as enquiry forms and checklists.

Stage 8: First 90 Days After Leaving

- Soft-launch your business with limited availability.
- Focus on delivering exceptional experiences for your first clients. One perfect safari defines a more successful business than 100 safaris that are not conducted or organised properly. Take your time.
- Refine systems after every booking.
- Establish a weekly CEO routine covering finance, suppliers, marketing, and follow-ups.

Minimum Readiness Checklist

1. Clear legal understanding of your contract. Opt-in guest communication channel. 2. Three sellable itineraries.
2. Registered business and bank account.
3. Professional invoicing and accounting system.
4. Trusted supplier network or relationship with established company
5. Website and email live.
6. Booking SOP in place.
7. Financial runway or confirmed bookings. This is important, see Financial Runway below...

Risk-Reduction Module

Why Most Safari Guides Fail in Year One

This module exists to prevent predictable failure. Most guide-led businesses do not fail because the guide lacks skill — they fail because the guide underestimates what running a business actually requires.

Leaving Too Early

- No financial runway.
- No confirmed bookings.
- No/bad operational systems.
- Emotional exit instead of strategic exit which cultivates a bad reputation and reluctance to work with you within the supplier markets

Trying to Sell Everywhere

- Too many destinations.
- Too many suppliers.
- No depth of knowledge.
- Inconsistent delivery.

Poor Financial Discipline

- Mixing personal and business funds.

- Underpricing itineraries. You may have to strategically do this sometimes in order to get off the ground but be careful
- Ignoring cash flow timing. If the cash flow forecast says you are in trouble, then cut back on expenses urgently
- No accountant oversight. See Finances below...

Weak Supplier Control

- Relying on unvetted ground handlers
- Unclear cancellation terms
- No backup plans. If a country all of a sudden is unsafe to travel to (this happens in Africa more than you think) you need to have contingency plans. If flights can't take off to get guests into national park, if weather leaves road impassable etc etc. You need to be able to 'make a plan'. See below
- Failure to document agreements

Marketing Instead of Operations

- Beautiful branding but broken delivery.
- No SOPs.
- No client journey mapping.
- Over-promising experiences.

Still Thinking Like an Employee

- Avoiding sales conversations.
- Avoiding money discussions.
- Avoiding uncomfortable decisions.
- Not stepping into CEO responsibility.

CAN\|DID Safeguard Principles

1. Do not resign without a plan.
2. Do not sell what you cannot deliver.
3. Do not take deposits without systems.
4. Protect your reputation above short-term income.
5. Build slowly and deliberately.
6. Secure 5 guest relationships that you know will travel with you in the future

The 5 guest principle. *Many guides believe they need a massive client base to start a business. This couldn't be further from the truth. Depending on your circumstances, you need no more than five in the beginning. Understand this, your relationship with these five guests or families must be solid. You must devote your time and energy to them and make sure their needs and concerns are well catered for. If something goes wrong, whether it's your fault or not, you take full responsibility for it even if it means a great financial cost. 5 happy guests/families means they will return for more. It also means they trust you to recommend you to their friends. 5 becomes 10, 10 becomes 20 - you get the point!*

SOP's, Client Questionnaires, Supplier Evaluation

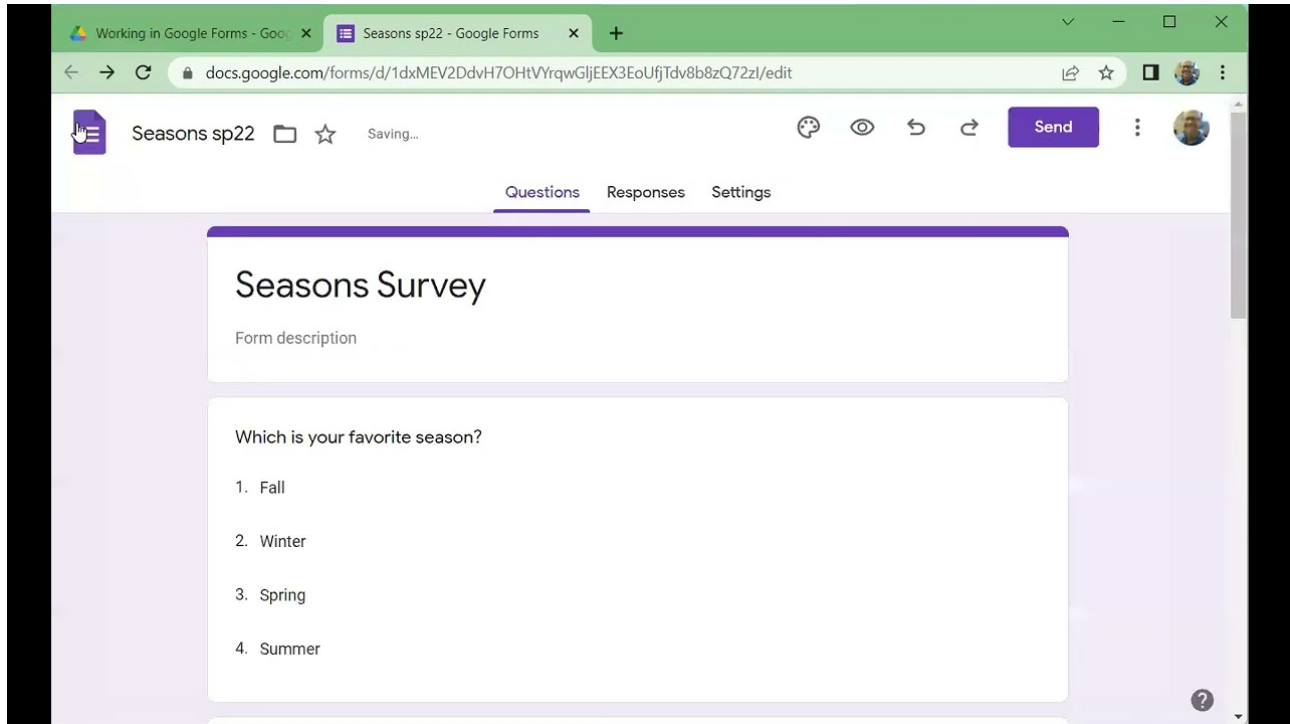
Useful docs and procedures to help streamline your operation

This module consists of a few guidelines and standard operating procedures that will help you structure your business properly. Taking an enquiry to paid booking and then to a happy and returning guest requires skill and effort, the following will help.

CAN\DID – Booking Standard Operating Procedure (SOP) Booking Workflow

- Inquiry received and logged
- If they give detail, check with suppliers for availability
- Reply via mail, request call, express your value, gather details
- Proposal issued, lookbook first
- Terms accepted and deposit received
- Suppliers confirmed, pay forth deposits
- Send itinerary
- Final documents issued
- Post-trip follow-up completed

CAN\|DID – First Client Intake Questionnaire Guest Profile. This can be sent as a Google form (see video)



The screenshot shows a Google Forms interface in a web browser. The browser's address bar displays the URL: docs.google.com/forms/d/1dxMEV2DdvH7OhtVYrqwGJjEEX3EoUfjTdv8b8zQ72zl/edit. The form is titled 'Seasons Survey' and has a subtitle 'Form description'. The first question is 'Which is your favorite season?' with four multiple-choice options: 1. Fall, 2. Winter, 3. Spring, and 4. Summer. The form is currently in 'Questions' mode, with tabs for 'Responses' and 'Settings' visible. A 'Send' button is located in the top right corner of the form editor.

Who is travelling and ages?

Previous safari experience?

Fitness and mobility considerations?

Travel Preferences

Preferred countries or regions

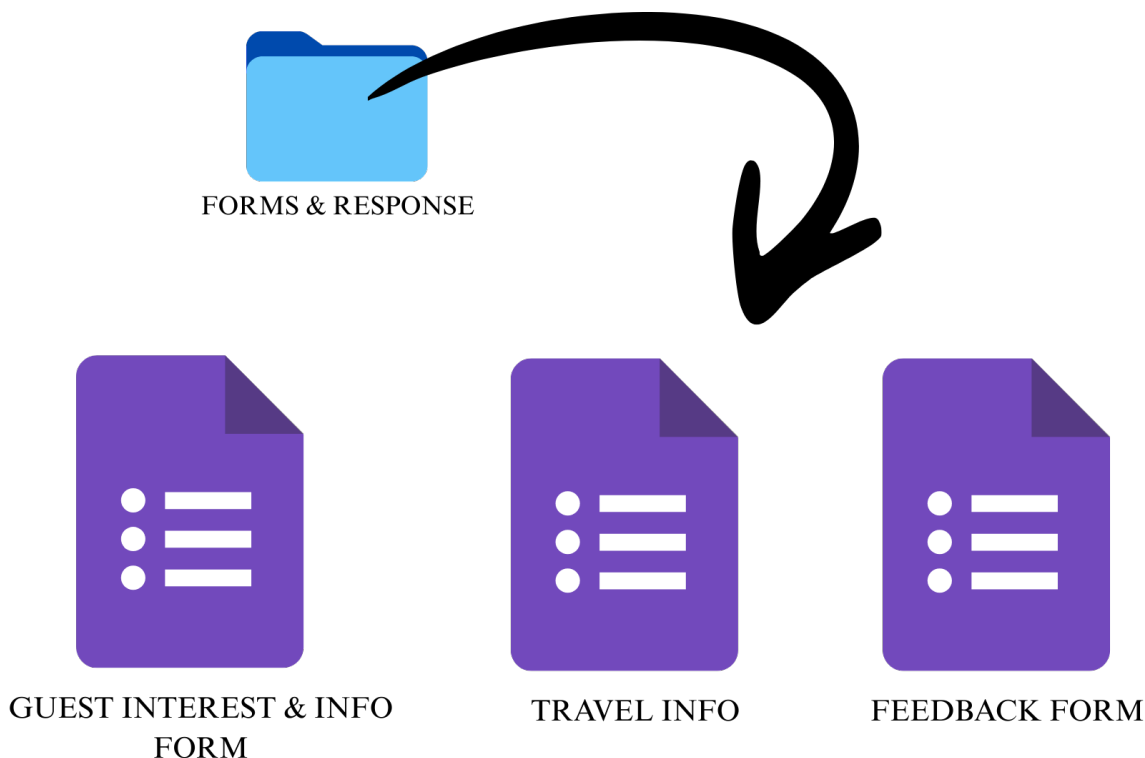
Budget range per person

Pace: relaxed vs adventurous

Photography, walking, boating, culture interests

Logistics - Travel dates flexibility

Departure country



Consider adding your Google forms and responses to their own folder on your Google Drive

- Guest interest/info

When they first enquire you send this to them to gather details relating to what they want to experience. Big cats, the migration, walking safaris, boating safaris, elephants, South Africa, Kenya etc etc. It is important to get their travel dates and budget in this first form to.

- Travel info

This is for information need by you and the lodges. Date of birth, fitness levels, medical and dietary requirements, passport details, international flight details

- Feedback

This is sent once you guests arrive home again and you want to find out how the trip went, what they loved, what they thought could have been better. Make sure a box is there to allow the guest to tick, allowing you to use the feedback as testimonials.

If you are struggling with how to lay out one of these form, what categories to add for example, it is time for you to learn the power of ChatGPT.

Step 1 - Type ChatGPT into Google

Step 2 - Type I need the layout of a google form gathering relevant information from clients who wish to travel to Africa on safari. I need to gather enough about their interest, budget and travel dates to be able to put together the best safari for them

Step 3 - Repeat this process and alter the text for each form

Step 4 - Copy and paste ChatGPT's response, with your modifications, into you Google form

Setting up your Google Drive

This is your 'headquarters'

Correctly setting up your Google Drive (or other organisational platform) will make or break your company. Here, you and your team, should be able to easily store and access every document relating to every guest, supplier or to your company itself. Here is an easy way to set it up so that it is ready for use.



This structure ensures every safari booking is organised, auditable, and easy to hand over or scale. Consistency is non-negotiable.

Google Drive - Home

Depending on the structure of your business, the title on these folders may differ and you may take some out and add others. This is a good guideline.



MARKETING
ASSETS



SUPPLIERS



CLIENTS



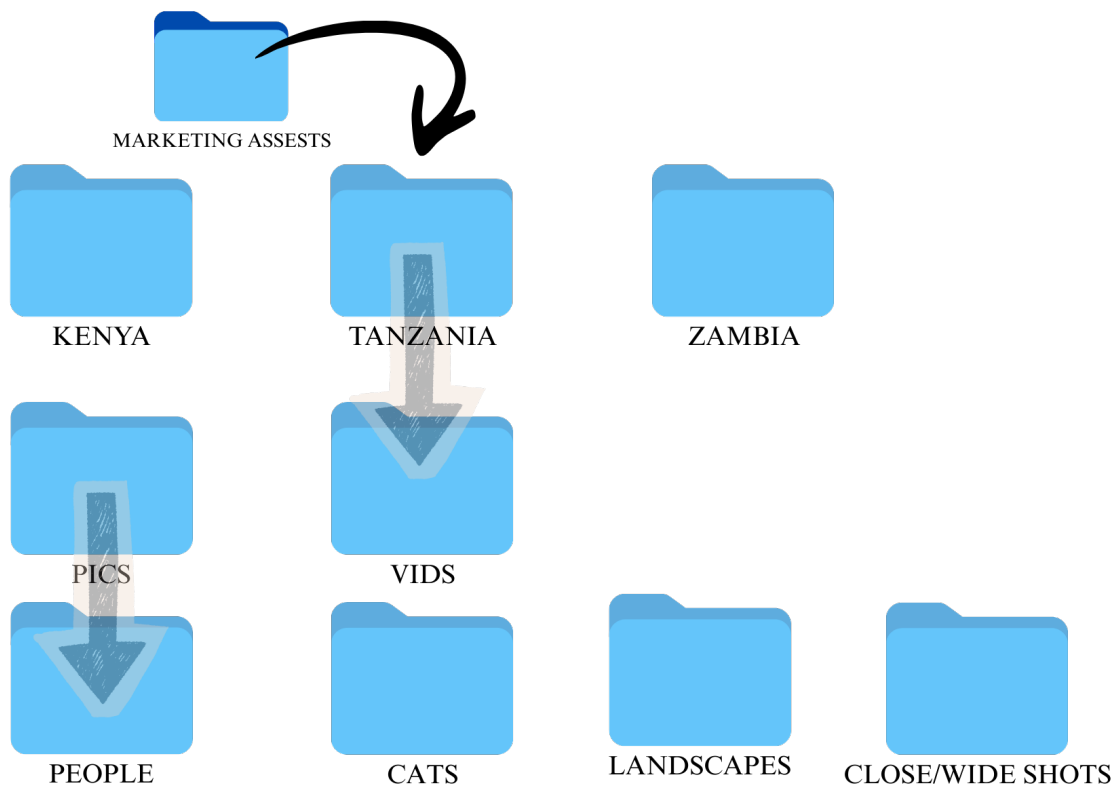
FINANCE



LEGAL &
COMPLIANCE

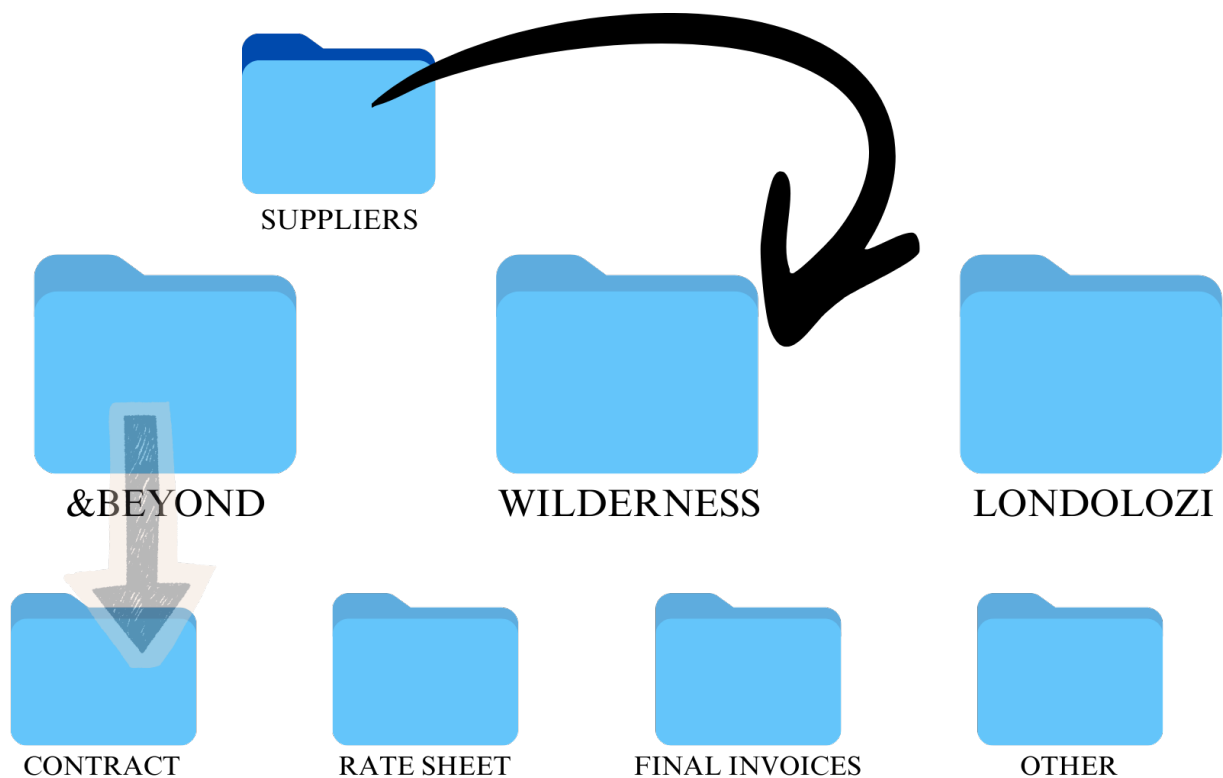
- COMPANY REGISTRSTION
- TAX CERTIFICATES
- BANK CONFIRMATION FOR EACH ACCOUNT
- OROOF OF ADDRESS
- BIO DATA OF EMPLOYEES
- TERMS & CONDITIONS

Google Drive - Marketing Assists

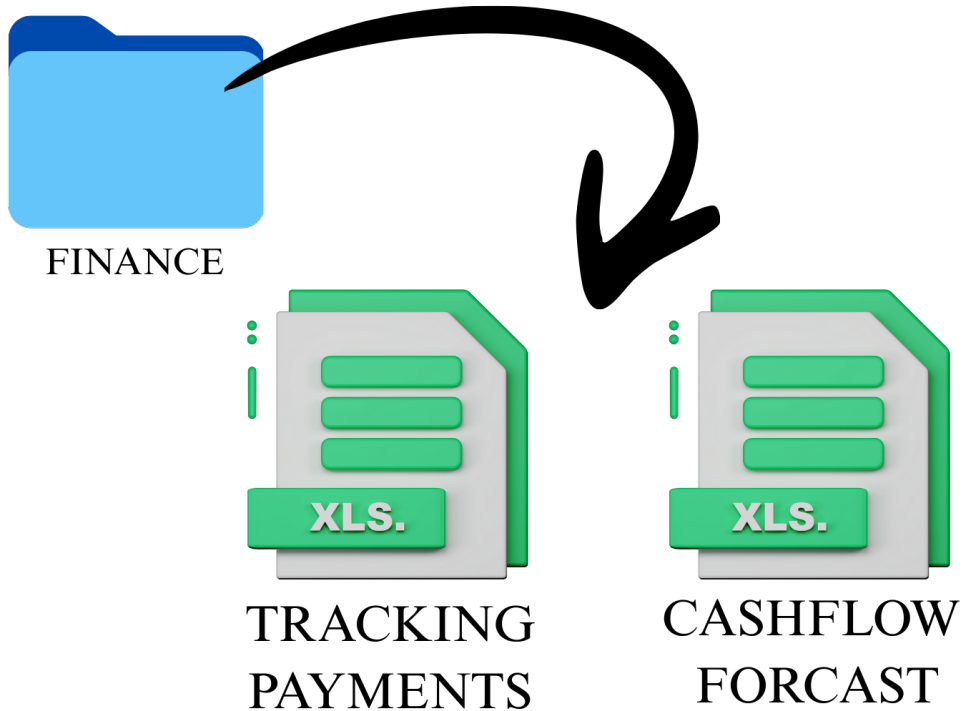


Content is one of the most important elements of your business. It will determine how effectively you can market yourself in the future and how legitimate you appear in the markets themselves. Organise it properly from the start and you will save costing yourself dearly in the most valuable commodity of all...TIME!

Google Drive - Suppliers



Google Drive - Finance



Essentially, you need to well organised documents. Tracking Payments and Cashflow forecast. Tracking payments allows you to stay current with when you need to chase up clients for payments and what is owed to suppliers and when. Cashflow forecast gives you a long term general idea of how the company is doing financially. These HAVE TO BE UPDATED MONTHLY!

CASHFLOW
FORECAST(MONTHLY, INDEFINITELY)

Date	Payments received		Company expense		Personal expense		Expected payment		Owed to suppliers	
	All money entering back account		All money spent on companies ie flights, travel, trip expenses		All personal expenses		All payment expect from guests in the future		Total owed to suppliers for future safaris	
12/Dec/2024	\$3450	Sandler deposit	\$354	MalaMala tip	R300	Fuel	\$3860	Smith deposit	\$4837	01SMITH, Asilia final
12/Dec/2024	\$4507	Smith final payment	\$222	Taxi, Entebbe	R450	Clothing	\$25099	Sandler final payment	\$35969	05SANDLER, &Beyond deposit
12/Dec/2024	\$500	Yin Deposit	R234	Food airport	R850	Groceries	\$56009	Yin final payment	\$45768	02SMITH, Londolozzi Deposit

Tracking Payments Table - Feel free to customise should you wish

Study the table below. Tracking payment correctly is an unconditional skill you need to perfect and be religious about updating it (every time something changes or payment is received/made)

Invoice No	Name	Reference	Trip Reference	Deposit paid	Still to paid (total trip minus deposit)	Total trip	Est Profit
1	J.Smith	01SMITH	Serengeti Safari 2022	US\$2345,00	US\$12695,0	US\$15040,0	US\$2367,00
2	S.Sandler	03SANDLER	Zimbabwe Safari 2023	US\$4503,00	US\$7847,00	US\$12350,0	US\$3673,00
3	D.Yin	02YIN	Okavango 2024	US\$3450,00	US\$15055,0	US\$18505,0	US\$2123,00

Continued....

Pax (how many guests)	Invoice date	Trip date	Date final payment due	Outstanding invoice sent	Guest form sent	Guest form filled	Itinerary info sent	Notes
2	22/Jan/2022	23/Nov/2025	3 months prior to travel date	No	Yes	Yes	Yes	
4	25/Feb/2023	05/Sep/2024	3 months prior to travel date	Yes	No	No	Yes	

- Reference - Every time someone books a safari with you, the booking is assigned a reference for your company's records. The easy way to do this is to start with what number trip this is for that guest and your company, "02" means their second trip with you, and their surname "SMITH". So, the booking reference for this booking is 02SMITH

- Trip reference - is a quick description of the trip including year of travel(you can add full date). For example, the Smith's are doing the Serengeti in 2025 so you put Serengeti2025 as the trip reference
- If a payment is still due it its cell is **red** and if a payment has not arrived yet it its cell is **green**. The same goes for documents still to be sent or successfully sent already.

Staying in touch with guests

Keeping solid contact with guests you guide in lodges will define the trajectory of your business when you start and throughout its lifespan. Do this ethically that aligns with your lodges policies and only if the guest requests it. See below for the best ways to achieve this.

- Take photos of the guests on safari (with their permission) and offer to send them to them via email - an email that has your landing page and social media links in the signature
- Offer to tag them on social media posts
- Mention your blog of incredible experiences you have when out in the field and if they want to subscribe to the letter

Example Invoice - Use Numbers(on Mac), Excel, CANVA, Google Docs etc

COMPANY NAME

LOGO

Company Registration No

INVOICE

01234 567 890

no_reply@example.com

123 High Street

Anytown, County, Postcode 4444

Physical Address

Client details

Attention: Trenz Pruca

321 New Street

Anytown, County, Postcode

Date: 08/01/20

Company: Bangwela Safaris LTD

Safari Description: Serengeti Safari

Reference: 01PRUCA

Invoice Number: 0005

Cashier: James Smith

Your details

Description	Quantity	Unit Price	Cost
Serengeti Safari	2	R 55 000,00	R 110 000,00
Additional luggage	1	R 500,00	R 500,00
VIP meet & greet	1	R 1 000,00	R 1 000,00
		Subtotal	R 111 500,00
VAT only with booking with SA	VAT	20,00%	R 22 300,00
		Total	R 133 800,00
	Deposit 35%		R 46 830,00

Payment details

Thank you for your business. It's a pleasure to work with you on your Safari.

Your payment is due 30 days prior to Safari

Yours sincerely,

Urna Semper

Personalized thank you not

How to cost a safari? - Use Google sheets and keep it in your Drive

Below is a basic costing used to cost a safari for your clients. It is broken into two distinct areas.

Commissioned items and non-commissioned items.

As an ethical travel planner you should never commission items such as park fees and gorilla permits, although many agents do!

Commissioned items are mostly made up of the actual nights at each lodge and everything that night includes (be sure to confirm this when making the booking). If you are private guiding the safari, your lodging fees will also go in here. Major transfers such as flights can be included in this section.

Lodge	Pax	Nights	Nett	Total Nett	Margin	Selling Price	Commission
Guest costs							
Chula	4	2	\$ 720.00	\$ 5,760.00	0.8	\$ 7,200.00	\$ 1,440.00
Musekese	4	2	\$ 720.00	\$ 5,760.00	0.8	\$ 7,200.00	\$ 1,440.00
Ntemwa	4	2	\$ 720.00	\$ 5,760.00	0.8	\$ 7,200.00	\$ 1,440.00
LUN- Jeki	4	1	\$ 275.00	\$ 1,100.00	0.95	\$ 1,157.89	\$ 57.89
Jeki- Lufupa	4	1	\$ 690.00	\$ 2,760.00	0.95	\$ 2,905.26	\$ 145.26
Lufupa- Plains	4	1	\$ 575.00	\$ 2,300.00	0.95	\$ 2,421.05	\$ 121.05
Plains- LUN	4	1	\$ -	\$ -	0.9	\$ -	\$ -
Flight taxes (lusaka)	4	1	\$ 20.00	\$ 80.00	1	\$ 80.00	\$ -
Flight taxes (bush airstrips)	4	2	\$ 5.00	\$ 40.00	1	\$ 40.00	\$ -
Tour/activity 2	0	0	\$ -	\$ -	0.9	\$ -	\$ -
	0	0	\$ -	\$ -	1	\$ -	\$ -
	0	0	\$ -	\$ -	1	\$ -	\$ -
	0	0	\$ -	\$ -	1	\$ -	\$ -
	0	0	\$ -	\$ -	1	\$ -	\$ -
	0	0	\$ -	\$ -	1	\$ -	\$ -
Total :				\$ 23,560.00		\$ 28,204.21	\$ 4,644.21

Noncommissioned items include park fees, conservation fees, gorilla permits etc. **The most common mistake in this industry is forgetting to add**

Non Admin Fee'd Items	Pax	Item	Unit Nett	Total Nett Cost			
Park Fees	4	7	\$ 120.00	\$ 3,360.00	1	\$ 3,360.00	
Park Fees	0	0	\$ -	\$ -	1	\$ -	
Conservation Levies	0	0	\$ -	\$ -	1	\$ -	
Additional transfers	0	0	\$ -	\$ -	1	\$ -	
Gorilla permits	0	0	\$ -	\$ -	1	\$ -	
Chimpanzee permits	0	0	\$ -	\$ -	1	\$ -	
Other (specify)	0	0	\$ -	\$ -	1	\$ -	
Other (specify)	0	0	\$ -	\$ -	1	\$ -	
Default Admin Costs							
Safari Portal	1	1	\$ 350.00	\$ 350.00	1	\$ 350.00	
Insurance	1	1	\$ 75.00	\$ 75.00	1	\$ 75.00	
Bank Fees per pax	2	1	\$ 70.00	\$ 140.00	1	\$ 140.00	
Gift per pax	4	1	\$ 100.00	\$ 400.00	1	\$ 400.00	
Conservation Donation per pax	4	1	\$ 50.00	\$ 200.00	1	\$ 200.00	
Admin Fee	1	1	\$ 150.00	\$ 150.00	1	\$ 150.00	
Totals				\$ 4,675.00		\$ 4,675.00	\$ -

these or adding them incorrectly. You will likely have to pay for this if your guests pay in full by the time you find out the error!

It is important to not be greedy with your costings but also not sell yourself short. Build trust with your guests is paramount. Loyal guests should often get discounts and rewards.

As residents in Africa we are in a strong position as our overheads are much lower than overseas. Be competitive and sell below the Rack rate where you can. A reputation of fair trade goes a very long way in this game but if word gets out you charge more than you are worth, it is unlikely your business will ever recover!

Costing Explained

Names of each
separate lodge

Nett(the rate for travel
agents) per night

Total Nett = pax(4) x nights(2) x
nightly Nett(\$720)

Number of nights
per lodge

Number of guests

Lodge	Pax	Nights	Nett	Total Nett
Guest costs				
Chula	4	2	\$ 720.00	\$ 5,760.00
Musekese	4	2	\$ 720.00	\$ 5,760.00
Ntemwa	4	2	\$ 720.00	\$ 5,760.00
LUN- Jeki	4	1	\$ 275.00	\$ 1,100.00
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Plains- LUN	4	1	\$ -	\$ -
Flight taxes (lusaka)	4	1	\$ 20.00	\$ 80.00
Flight taxes (bush airstrips)	4	2	\$ 5.00	\$ 40.00
Tour/activity 2	0	0	\$ -	\$ -
	0	0	\$ -	\$ -
	0	0	\$ -	\$ -
	0	0	\$ -	\$ -
	0	0	\$ -	\$ -
	0	0	\$ -	\$ -
Total :				\$ 23,560.00

Flights and major
transfer services

Total Nett(agent
rate) costs

As a percentage, what your
commision rate is. 0.8 is 20%

Selling price of each stay at each lodge.
Total Nett(\$5760)+ Rack(selling)rate - 20%

Margin	Selling Price	Commission
0.8	\$ 7,200.00	\$ 1,440.00
0.8	\$ 7,200.00	\$ 1,440.00
0.8	\$ 7,200.00	\$ 1,440.00
0.95	\$ 1,157.89	\$ 57.89
0.95	\$ 2,905.26	\$ 145.26
0.95	\$ 2,421.05	\$ 121.05
0.9	\$ -	\$ -
1	\$ 80.00	\$ -
1	\$ 40.00	\$ -
0.9	\$ -	\$ -
1	\$ -	\$ -
1	\$ -	\$ -
1	\$ -	\$ -
1	\$ -	\$ -
1	\$ -	\$ -
	\$ 28,204.21	\$ 4,644.21

Total commission per lodge stay

Total commission

Total guest cost, not including
non-admin fee'd items

Costing continued...

Item Name

Number of guests

Nett(the rate for travel agents) per items

Number of items

Total Nett = pax(4) x Item(7)

Non Admin Fee'd Items	Pax	Item	Unit Nett	Total Nett Cost
Park Fees	4	7	\$ 120.00	\$ 3,360.00
Park Fees	0	0	\$ -	\$ -
Conservation Levvies	0	0	\$ -	\$ -
Additional transfers	0	0	\$ -	\$ -
Gorilla permits	0	0	\$ -	\$ -
Chimpanzee permits	0	0	\$ -	\$ -
Other (specify)	0	0	\$ -	\$ -
Other (specify)	0	0	\$ -	\$ -
Default Admin Costs				
[Redacted Admin Costs]				
Totals				\$ 4,675.00

This may include your admin fee, insurance, bank fees etc. Its best to never mark any of this up and keep the numbers to yourself(don't share)

Total default admin cost

Total Nett for safari

	Nett Cost Per Group	Rack Cost Per Group
Grand Table Totals	\$ 28,235.00	\$ 32,879.21

Total Rack for safari
divide by number of pax for
per person rate

Nett Cost Per Group	Rack Cost Per Group	Est Commission
\$ 28,235.00	\$ 32,879.21	\$ 4,644.21

Total commission