

The Solo Agent's Lead Capture Stack: Instagram, WhatsApp, and One CRM



Before Maya had five agents, she was one person at a kitchen table trying to remember which prospect said what and on which app. This playbook is the stack she wishes somebody had handed her on day one.

The Sunday She Lost a Lead



A family of five had messaged her on Instagram Thursday, followed up on WhatsApp Friday, and emailed flight preferences Saturday. By Sunday night she couldn't piece together what she'd already told them. On Monday they booked through a competitor. That weekend she decided she needed a system she could run from her phone without duct tape.

Picking the Three Channels That Convert



Maya listed every channel travelers could find her through and crossed out seven of them. Facebook, Twitter, TikTok, LinkedIn, her old blog. What was left were three that actually produced inquiries worth replying to: Instagram for discovery, WhatsApp for closing, and Google Business Profile for local searchers in buying mode. Three channels done well beats seven done poorly.

Instagram: Profile, Highlights, Response Rule



She rewrote her bio in one sentence that named what she booked, for whom, and typical party size. She added three highlight sets with real itineraries and real pricing ranges, not stock aspirations. Her link in bio went to one page, not a Linktree with twelve options.

Instagram: Profile, Highlights, Response Rule



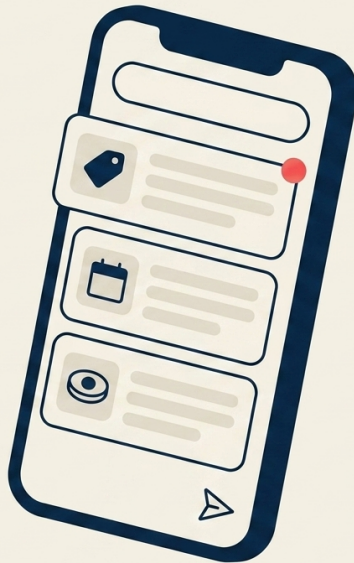
The harder change was her response rule. Two hours during business hours, next-morning by 10am for after-hours inquiries. Anything slower she'd rather not reply at all than fake that she hadn't seen it.

WhatsApp Business: The Single Inbox



Every Instagram prospect asked to move to WhatsApp within three messages, so she made it official. Separate number, WhatsApp Business installed, a business profile with real hours and a real photo. The auto-greeting promised a 2-hour reply, which meant she had to keep the promise.

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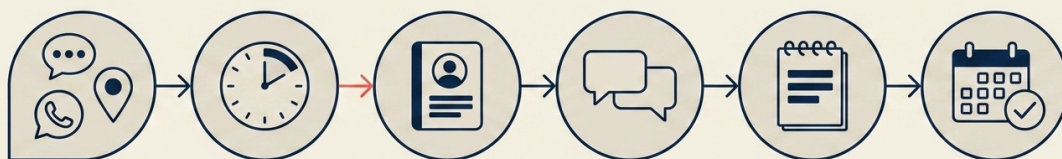
She wrote three quick-reply templates for the questions she got every week. Price range, availability, deposit terms. Copy-paste, then personalize the first sentence. That one habit cut her response time in half.

One CRM: Picked, Not Researched to Death



Maya looked at seven CRMs and picked one in an afternoon. What she actually needed was simple. A contact list with tags, five pipeline stages, a log of every message across channels, a task reminder, and a mobile app that didn't crash. [Rework pricing](#) starts at \$12/user/month for exactly that, without bundling the enterprise features she wouldn't touch for three years. The point was not which CRM. It was having one CRM.

The Flow She Ran Thirty Times a Week



An inquiry arrived on Instagram, WhatsApp, or her Google Profile. She replied within the SLA with a qualifying question about dates and travelers. The moment the prospect responded, she saved a CRM contact. Not later, not when they booked. Right then. Every exchange after that got a note, every quiet stretch got a follow-up task, and nothing fell through a gap between apps.

The Signal It's Time to Grow



The stack works until it doesn't. Maya's trigger was a Wednesday where she missed her 2-hour SLA three times in one day. She'd turned down two bookings that month. Her partner mentioned the business was eating Saturdays again. That was when she stopped adding channels and started adding people, which is covered in [Hiring your first 2 travel agents](#).

Her First-Week Result



One weekend is what the whole setup took. WhatsApp Business with a separate number, Google Business Profile with messaging enabled, rewritten Instagram profile, CRM signup and import, quick replies, one landing page. By the following Monday every inquiry from every channel had a place to go and a next step attached. That was the whole game.