

Level 2 NVQ Certificate in Tourism Services (4927-24/25)

Qualification handbook for centres

500/9965/6

Visitor Services

Tour Guiding



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Level 2 NVQ Certificate in Tourism Services (4927-24/25)



Qualification handbook for centres

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Qualification title	Number	QAN
Level 2 Certificate in Tourism Services – Visitor Services	4927-24	500/9965/6
Level 2 Certificate in Tourism Services – Tour Guiding	4927-25	500/9965/6

Version and date	Change detail	Section
1.2 Jan 2012	Pictorial images	Introduction
	Unit 208 GLH	Unit
	Unit 224 credit value corrected	Unit
	Unit 331 level	Unit

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1 Introduction to the qualification

This document contains the information that centres need to offer the following qualification:

Qualification title and level	Level 2 NVQ Certificate in Tourism Services
City & Guilds qualification number	(4927-24/25)
Qualification accreditation number	500/9965/6
Last registration date	31/12/2013
Last certification date	31/12/2015

Area	The Level 2 Certificate in Tourism Services...
Who is the qualification for?	... meets the needs of candidates who work or want to work as a tourist guide or in a Tourist Information Centre in the tourism services sector
What does the qualification cover?	... allows candidates to learn, develop and practise the skills required for employment and/or career progression in the tourism services sector.
Why has the qualification been developed?	... provides valuable accreditation of skills and/or knowledge for candidates, without requiring or proving occupational competence. ... replaces the City & Guilds Level 2 NVQ in Travel and Tourism Services (4847) which expires on 31/08/2010].

1.1 Qualification structure

To achieve the Level 2 NVQ Certificate in Tourism Services, learners must achieve 13 credits from the mandatory units and choose one pathway to complete the qualification, see diagram for a visual representation of the pathways.

The diagram below illustrates the unit accreditation numbers, unit titles, the credit value of each unit and if the unit is mandatory or optional.

Unit accreditation number	City & Guilds unit number	Unit title	Mandatory/ optional for full qualification	Credit value	Excluded combination of units (if any)
L/601/0933	Unit 201	Give customers a positive impression of yourself and your organisation	Mandatory	5	N/A
D/601/9345	Unit 203	Develop and maintain your effectiveness at work	Mandatory	4	N/A
D/601/5151	Unit 206	Process travel and tourism services payments	Optional	3	N/A
F/601/6552	Unit 208	Set up and maintain promotional displays	Optional	4	N/A
F/601/6566	Unit 209	Sell tourism-related products and services	Optional	5	N/A
Y/601/5732	Unit 210	Identify and provide tourism-related information and advice	Optional	5	N/A
Y/601/6590	Unit 211	Collect and maintain tourism information and data	Optional	3	N/A
A/601/6596	Unit 212	Process tourism bookings	Optional	3	N/A
K/601/6559	Unit 215	Assist with travel and tourism problems and emergencies	Optional	4	N/A
F/601/5949	Unit 217	Lead people on a guided tour	Optional	5	N/A

A/601/6470	Unit 218	Present a commentary for a guided tour	Optional	4	N/A
A/601/5786	Unit 220	Display stock and materials	Optional	3	N/A
M/601/1511	Unit 221	Resolve customer service problems	Optional	6	N/A
F/601/6440	Unit 223	Build and maintain relationships with customers not present	Optional	6	N/A
L/601/5727	Unit 224	Research travel and destination information	Optional	3	N/A
T/601/6595	Unit 226	Build and maintain face-to-face relationships with customers	Optional	5	N/A
D/601/6610	Unit 311	Build and maintain customers' profiles	Optional	3	N/A
A/601/5867	Unit 331	Ensure responsibility for actions to reduce risks to health and safety	Mandatory	4	N/A

VISITOR SERVICES
13 mandatory credits from:

Unit 201
Give customers a positive impression of yourself and your organisation
(5 credits)

Unit 203
Develop and maintain your effectiveness at work in a travel and tourism environment
(4 credits)

Unit 331
Ensure responsibility for actions to reduce risks to health and safety
(4 credits)

8 credits from:

Unit 224
Research travel and destination information
(3 credits)

Unit 210
Identify and provide tourism-related information and advice
(5 credits)

9 credits from:

Unit 206
Process travel and tourism service payments
(3 credits)

Unit 208
Set up and maintain promotional displays
(4 credits)

Unit 209
Sell tourism-related products and services
(5 credits)

Unit 211
Collect and maintain tourism information and data
(3 credits)

Unit 212
Process tourism bookings
(3 credits)

Unit 218
Present a commentary for a guided tour
(4 credits)

Unit 220
Display stock materials
(3 credits)

Unit 221
Resolve customer service problems
(6 credits)

Unit 223
Build and maintain relationships with customers not present
(6 credits)

Unit 226
Build and maintain face-to-face relationships with customers
(5 credits)

Unit 311
Build and maintain customers' profiles
(3 credits)

GUIDING
13 mandatory credits from:

Unit 201
Give customers a positive impression of yourself and your organisation
(5 credits)

Unit 203
Develop and maintain your effectiveness at work in a travel and tourism environment
(4 credits)

Unit 331
Ensure responsibility for actions to reduce risks to health and safety
(4 credits)

14 credits from:

Unit 217
Lead people on a guided tour
(5 credits)

Unit 218
Present a commentary for a guided tour
(4 credits)

Unit 226
Build and maintain face-to-face relationships with customers
(5 credits)

3 credits from:

Unit 206
Process travel and tourism service payments
(3 credits)

Unit 209
Sell tourism-related products and services
(5 credits)

Unit 210
Identify and provide tourism-related information and advice
(5 credits)

Unit 215
Assist with travel and tourism problems and emergencies
(4 credits)

Unit 221
Resolve customer service problems
(6 credits)

1.2 Opportunities for progression

On completion of this qualification candidates may progress into employment or to the following City & Guilds qualifications:

- Level 3 NVQ Certificate in Tourism Services
- Level 3 NVQ Diploma in Travel Services
- Level 3 Diploma in Travel and Tourism
- Level 2 Extended Diploma in Travel and Tourism

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description	How to access
Qualification handbook	Publications sales (SP124927)
Promotional materials	www.cityandguilds.com
Fast track approval form	www.cityandguilds.com

2 Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the qualification Level 2 NVQ in Travel and Tourism Services (4847) will receive automatic approval for the new Level 2 NVQ Certificate in Tourism Services (4927-21/22/23/24/25), which will be made available from the 01 August 2010.

2.1 Resource requirements

Human resources

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- have recent relevant experience in the specific area they will be assessing
- be occupationally knowledgeable in the area for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- update their occupational expertise and industry knowledge in the areas being assessed and verified through Continuous Professional Development
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors and internal verifiers

Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying this qualification or meet the relevant experience requirements outlined above.

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Age restrictions

This qualification is not approved for use by candidates under the age of 16, and City & Guilds cannot accept any registrations for candidates in this age group.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

4 Assessment

4.1 Summary of assessment methods

For this qualification, candidates will be required to complete a portfolio of evidence for the **full qualification**.

4.2 Evidence requirements

Witness Testimony

Witness testimonies can be obtained from people that are occupationally competent and whom may be familiar with the National Occupational Standards, such as the candidate's line manager. They may also be obtained from people who are not occupationally competent, and do not have a knowledge of the National Occupational Standards, such as other people within the candidate's workplace, customers and suppliers. The assessor must judge the validity of the witness testimony and these may vary depending on the source.

Expert witnesses may be used where additional support relating to the assessment of technical competence is required. Expert witnesses may be:

- other approved assessors that are recognised to assess the relevant National Occupational Standards, or
- line managers, other managers or experienced colleagues that are not approved assessors, but whom the awarding organisation/body agrees has current occupational competence, knowledge and expertise to make a judgement on a candidate's competence.

Expert witnesses must be able to demonstrate through relevant qualifications, practical experience and knowledge that they are qualified to provide an expert opinion on a candidate's performance in relation to the unit being assessed. People 1st believe that it is unlikely for an expert witness to be fully expert within any of the sector's occupational areas in less than twelve months to two years. The final judgement on the validity of the expert witness testimony rests with the assessor.

Professional Discussion

Professional discussion is encouraged as a supplementary form of evidence to confirm a candidate's competence. Such discussions should not be based on a prescribed list of questions but be a structured discussion which enables the assessor to gather relevant evidence to ensure the candidate has a firm understanding of the standard being assessed.

Simulation

Simulation can only be used to assess candidates for the sector's competence based units and qualifications where the opportunity to assess naturally occurring evidence is unlikely or not possible, for example assessment relating to health and safety, fire and emergency procedures. It should not include routine activities that must be covered by performance evidence. There are no units that can be solely achieved by simulation. In the case of imported units, where simulation is acceptable in the evidence requirements, it should only be used when performance evidence is unlikely to be generated through normal working practices.

People 1st does not permit the use of simulation, other than for Unit 215 Assist with travel and tourism problems and emergencies.

4.3 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at:
www.cityandguilds.com/eportfolios.

4.4 Recognition of prior learning (RPL)

Recognition of Prior Learning (RPL) recognises the contribution a person's previous experience could contribute to a qualification. RPL is allowed and is also sector specific.

5 Units

Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- level
- credit value
- unit accreditation number
- unit aim
- learning outcomes which are comprised of a number of assessment criteria
- guided learning hours
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- information on assessment
- notes for guidance.

Summary of units

City & Guilds unit number	Title	QCF unit number	Credits
201	Give customers a positive impression of yourself and your organisation	L/601/0933	5
203	Develop and maintain your effectiveness at work	D/601/9345	4
206	Process travel and tourism services payments	D/601/5151	3
208	Set up and maintain promotional displays	F/601/6552	4
209	Sell tourism-related products and services	F/601/6566	5
210	Identify and provide tourism-related information and advice	Y/601/5732	5
211	Collect and maintain tourism information and data	Y/601/6590	3
212	Process tourism bookings	A/601/6596	3
215	Assist with travel and tourism problems and emergencies	K/601/6559	4
217	Lead people on a guided tour	F/601/5949	5
218	Present a commentary for a guided tour	A/601/6470	4
220	Display stock and materials	A/601/5786	3
221	Resolve customer service problems	M/601/1511	6
223	Build and maintain relationships with customers not present	F/601/6440	6
224	Research travel and destination information	L/601/5727	2
226	Build and maintain face-to-face relationships with customers	T/601/6595	5
311	Build and maintain customer's profiles	D/601/6610	3
331	Ensure responsibility for actions to reduce risks to health and safety	A/601/5867	4

Unit 201

Give customers a positive impression of yourself and your organisation

Level: 2

Credit value: 5

NDAQ number: L/601/0933

Unit aim

Excellent customer service is provided by people who are good with people. The learner's behaviour affects the impression that customers have of the service they are receiving. This unit is about communicating with the customers and giving a positive impression whenever dealing with a customer. By doing this the learner can create a positive impression of the organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us and gives us good information. Every detail of the learners' behaviour counts when dealing with a customer.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Establish rapport with customers
2. Respond appropriately to customers
3. Communicate information to customers
4. Understand how to give customers a positive impression of themselves and the organisation

Guided learning hours

It is recommended that **33** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit directly relates to Unit A4 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit is endorsed by the Institute of Customer Service.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 201

Give customers a positive impression of yourself and your organisation

Outcome 1

Establish rapport with customers

Assessment Criteria

The learner can:

1. meet their organisation's standards of appearance and behaviour
2. greet their customer respectfully and in a friendly manner
3. communicate with their customer in a way that makes them feel valued and respected
4. identify and confirm their customer's expectations
5. treat their customer courteously and helpfully at all times
6. keep their customer informed and reassured
7. adapt their behaviour to respond to different customer behaviour.

Unit 201

Give customers a positive impression of yourself and your organisation

Outcome 2

Respond appropriately to customers

Assessment Criteria

The learner can:

1. respond promptly to a customer seeking help
2. choose the most appropriate way to communicate with their customer
3. check with their customer that they have fully understood their expectations
4. respond promptly and positively to their customer's questions and comments
5. allow their customer time to consider their response and give further explanation when appropriate.

Unit 201

Give customers a positive impression of yourself and your organisation

Outcome 3

Communicate information to customers

Assessment Criteria

The learner can:

1. quickly find information that will help their customer
2. give their customer information they need about the services or products offered by their organisation
3. recognise information that their customer might find complicated and check whether they fully understand
4. explain clearly to their customers any reasons why their expectations cannot be met.

Unit 201

Give customers a positive impression of yourself and your organisation

Outcome 4

Understand how to give customers a positive impression of themselves and the organisation

Assessment Criteria

The learner can:

1. describe their organisation's standards for appearance and behaviour
2. explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately
3. identify their organisation's rules and procedures regarding the methods of communication they use
4. explain how to recognise when a customer is angry or confused
5. identify their organisation's standards for timeliness in responding to customer questions and requests for information.

Unit 201 Give customers a positive impression of yourself and your organisation

Evidence requirements

Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1, 2, 3 and 4 – February 2010)

You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

Your communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

You must provide evidence of creating a positive impression with customers:

- during routine delivery of customer service
- during a busy time in your job
- during a quiet time in your job
- when people, systems or resources have let you down.

You must provide evidence that you communicate with customers effectively by:

- using appropriate spoken or written language
- applying the conventions and rules appropriate to the method of communication you have chosen.

Unit 203

Develop and maintain your effectiveness at work in a travel and tourism environment

Level: 2
Credit value: 4
NDAQ number: D/601/9345

Unit aim

This unit is about taking responsibility for improving your performance at work and working well with your colleagues so as to make a positive contribution to the overall effectiveness of your workplace.

Learning outcomes

There are **five** learning outcomes to this unit. The learner will:

1. Understand own role and responsibilities
2. Be able to improve personal performance at work
3. Know how to improve personal performance at work
4. Be able to work effectively as part of a team
5. Know how to work effectively as part of a team

Guided learning hours

It is recommended that **25** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Develop and maintain your effectiveness at work (approved as National Occupational Standard) unit TT10.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 203

Develop and maintain your effectiveness at work in a travel and tourism environment

Outcome 1

Understand own role and responsibilities

Assessment Criteria

The learner can:

1. outline own job role and responsibilities
2. state the standards of behaviour expected within the workplace
3. explain the importance of meeting own work targets
4. explain the importance of working within own job responsibilities
5. state the consequences of working outside own job responsibilities.

Unit 203

Develop and maintain your effectiveness at work in a travel and tourism environment

Outcome 2

Be able to improve personal performance at work

Assessment Criteria

The learner can:

1. discuss own strengths and weaknesses with the relevant person
2. seek additional information from relevant people when task instructions are unclear
3. use feedback from relevant people to improve own performance
4. request **opportunities to learn** from colleagues
5. review developments and trends in travel and tourism services industry regularly
6. agree realistic work **targets** with the relevant person
7. review progress of work **targets** with the relevant person regularly
8. update personal development plan regularly.

What you must do

The assessor must assess assessment criteria 1-8 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at **two** from **opportunities to learn**
 - a) from other relevant people
 - b) by active participation in training and development activities
 - c) active participation in workplace activities
- **both** from **targets**
 - a) productivity
 - b) personal development.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 203

Develop and maintain your effectiveness at work in a travel and tourism environment

Outcome 3

Know how to improve personal performance at work

Assessment Criteria

The learner can:

1. describe how own strengths and weaknesses can be identified
2. describe questioning and listening skills needed in order to obtain information on personal performance
3. describe how using the National Occupational Standards for travel and tourism services can help identify development needs
4. state how to access information on National Occupational Standards and qualifications relevant to travel and tourism
5. explain the importance of maintaining an awareness of current and emerging trends and developments within the industry
6. describe how to maintain awareness of current and emerging trends and developments within the industry
7. explain the importance of reacting positively to reviews and feedback
8. describe how to react positively to reviews and feedback
9. state own productivity targets and timescales
10. state personal development targets and timescales
11. explain the importance of continually using and updating own personal development plan
12. explain the importance of continuous professional development
13. describe how continuous professional development affects own job role
14. identify relevant people that can help with professional development.

Unit 203

Develop and maintain your effectiveness at work in a travel and tourism environment

Outcome 4

Be able to work effectively as part of a team

Assessment Criteria

The learner can:

1. agree ways of working together to achieve objectives
2. request help and information from colleagues when necessary
3. respond to requests for **assistance** from colleagues
4. offer assistance to others when needed
5. use time effectively throughout the working day
6. report problems that are likely to affect travel and tourism services to the relevant person promptly
7. resolve any misunderstandings with colleagues promptly
8. ensure contact with colleagues is friendly, helpful and respectful.

What you must do

The assessor must assess assessment criteria 1-8 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- **both** from **assistance**
 - a) on a one-to-one basis
 - b) in a group.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 203

Develop and maintain your effectiveness at work in a travel and tourism environment

Outcome 5

Know how to work effectively as part of a team

Assessment Criteria

The learner can:

1. state how to find out relevant information about other peoples' areas of responsibility
2. describe how own job role relates to others in the team
3. outline limits of own job role and of others in relation to giving **assistance**
4. describe how to manage time effectively
5. explain the importance of good working relationships
6. explain how to support co-operative ways of working
7. describe how to deal with relationship difficulties and conflicts when working with others
8. identify who to report relationship difficulties and conflicts in the workplace to
9. explain grievance and appeal procedures.

What you must do

The assessor must assess assessment criteria 1-8 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- **both** from **assistance**
 - a) on a one-to-one basis
 - b) in a group.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Level: 2
Credit value: 3
NDAQ number: D/601/5151

Unit aim(s)

This unit supports workforce development for those who are engaged in the receipt of different types of payment by a variety of means through direct contact with customers.

The unit is designed for use primarily by staff in both travel and tourism operations and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

1. Understand the principles of processing travel and tourism payments
2. Be able to receive payments
3. Be able to issue receipts and store payments
4. Know how to receive payments
5. Know how to issue receipts and store payments

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to People 1st National Occupational Standards for Travel and Tourism.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Unit 206

Process travel and tourism services payments

Outcome 1

Understand the principles of processing travel and tourism payments

Assessment Criteria

The learner can:

1. explain the importance of following procedures when receiving and receipting payments from customers
2. describe relevant current currency control regulations applicable to payments for foreign exchange including money laundering provisions
3. describe potential consequences of incorrect calculations and payments
4. describe the risks associated with transactions when the cardholder is not present and how to reduce the risk
5. describe duties and responsibilities in current industry legislation and codes of practice
6. describe the levels of authority for handling non-cash payments and dealing with payment discrepancies
7. describe code ten and conventional authorisation procedures
8. describe the organisation's accepted payment methods.

Unit 206

Outcome 2

Process travel and tourism services payments

Be able to receive payments

Assessment Criteria

The learner can:

1. ensure that customers are aware of the final total amount to be paid
2. ensure that customers are aware of the **methods of payment** that are acceptable, and any charges or restrictions that may be attached
3. follow the organisation's policies and procedures regarding **payment discrepancies**, non-cash payments, transaction values and limits
4. provide accurate change for cash payments
5. maintain the security of cash and other payments
6. use correct procedures to maintain confidentiality of customers' purchases and payment information.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **three** from **methods of payment**
 - a) credit card
 - b) debit card
 - c) personal cheque
 - d) traveller's cheques
 - e) vouchers
 - f) cash
- at least **two** from **payment discrepancies**
 - a) out of date card
 - b) card not authorised
 - c) fraudulent use of card
 - d) incorrectly complete cheques
 - e) incorrect cash amounts
 - f) seemingly counterfeit notes
 - g) notes out of circulation.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 206

Outcome 3

Process travel and tourism services payments

Be able to issue receipts and store payments

Assessment Criteria

The learner can:

1. complete all internal payment records accurately following the organisation's procedures
2. provide customers with legible and accurate receipts
3. securely store and **protect** all payments.

What you must do

The assessor must assess assessment criteria 1-3 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- **both** from **protected**
 - a) from loss
 - b) from theft.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 206

Process travel and tourism services payments

Outcome 4

Know how to receive payments

Assessment Criteria

The learner can:

1. describe the legislative requirements relating to processing payments and recording customers' information
2. identify the differences between charge, credit and debit cards
3. identify types of fraudulent card transactions
4. explain the charge back process
5. describe how to handle customers when dealing with payment discrepancies
6. describe how to calculate amounts due correctly
7. identify the relevant person for information, advice or payment authorisation
8. identify the charges that apply to different methods of payment and the implications to the customer and organisation.

Unit 206

Outcome 5

Process travel and tourism services payments

Know how to issue receipts and store payments

Assessment Criteria

The learner can:

1. describe organisational procedures for receiving, handling and receipting payments
2. describe organisational procedures for storing payments
3. explain organisational procedures for dealing with payment discrepancies
4. describe how to complete payment related documentation according to organisational procedures
5. explain organisational procedures in emergency situations relating to payments.

Level: 2
Credit value: 4
NDAQ number: F/601/6552

Unit aim(s)

This unit supports workforce development for those who set up and maintain promotional displays. The unit is designed for use primarily by travel agency and tourist information staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **four** outcomes to this unit. The candidate will:

1. Understand the principles of promotional materials
2. Be able to make preparations for promotions
3. Be able to set up, maintain and remove promotional materials
4. Know how to set up and maintain promotional displays

Guided learning hours

It is recommended that **27** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 208

Set up and maintain promotional displays

Outcome 1

Understand the principles of promotional materials

Assessment Criteria

The learner can:

1. explain why promotional materials should be up-to-date and easily accessed
2. explain the potential consequences of passing on out-of-date information in promotional materials
3. explain the importance of displays when promoting travel and tourism products and services
4. explain why it is important to check the accuracy and legality of information on promotional materials
5. describe how to check the accuracy and legality of information on promotional materials
6. explain why it is important to check for potential health and safety hazards before, during and after the setting up of displays.

Unit 208

Outcome 2

Set up and maintain promotional displays

Be able to make preparations for promotions

Assessment Criteria

The learner can:

1. confirm the **requirements for the promotion**
2. clarify if information regarding the promotion is not complete or clear
3. ensure that the intended display area is the right size and does not affect access
4. ensure that materials, equipment and stock required for the display are available, clean, up-to-date, safe and in good working order
5. clear, clean and prepare the display area properly before use
6. produce cards and posters that are legible and match the **instructions** provided and the organisation's house style and standard required.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- **all** from **requirements for the promotion**
 - a) stock and space
 - b) display position and dates
 - c) safety and security
 - d) organisational standards for promotional materials
- **all** from **instructions**
 - a) content
 - b) deadlines
 - c) position.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 208

Outcome 3

Set up and maintain promotional displays

Be able to set up, maintain and remove promotional materials

Assessment Criteria

The learner can:

1. set up and remove **promotional materials** correctly within the agreed timescale
2. maintain displays in a clean, tidy and safe condition throughout the promotional period
3. maintain the required levels and type of stock on display throughout the promotional period
4. ensure that information is up-to-date and in good condition at all times
5. return equipment and excess materials to storage
6. safely dispose of any materials that are out-of-date, damaged or no longer needed following your organisational waste disposal procedures.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **three** from **promotional materials**
 - a) brochures
 - b) posters
 - c) stickers
 - d) cards
 - e) labels
 - f) leaflets.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 208

Outcome 4

Set up and maintain promotional displays

Know how to set up and maintain promotional displays

Assessment Criteria

The learner can:

1. explain the importance of ensuring information supplied is correct and complies with relevant, current legislation
2. summarise the relevant health and safety legislation relating to the storage and lifting of materials
3. explain why it is important to clean any materials and equipment used in displays and dispose of waste materials safely and in an environmentally friendly way
4. describe how to check health and safety hazards and how to use any display equipment safely, including checks on its working order
5. describe how to store promotional materials safely and keep them in good condition
6. explain how placing items in specific places attracts attention and promotes sales
7. describe how to use space effectively when displaying items
8. outline organisational requirements for:
 - standards for promotions, their maintenance and removal
 - minimum stock levels for all promotional materials
 - corporate image and house style of locally made cards and posters
 - the disposal of out-of-date promotional materials
9. identify own responsibilities for maintaining minimum stock levels of promotional materials
10. describe how to check that all displayed items are accurate and up-to-date and conform to organisational requirements
11. identify the instructions for specific promotional activities and where to access information on current promotional activities
12. describe the organisation image and professional branding.

Level: 2
Credit value: 5
NDAQ number: F/601/6566

Unit aim(s)

This unit supports workforce development for those who sell tourism products and services for visitors eg at Tourist Information Centres, souvenir shops, visitor attractions, etc.

The unit is designed for use primarily by visitor services retail staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **eight** outcomes to this unit. The candidate will:

1. Understand the process of selling products and services
2. Be able to identify and meet customers' requirements
3. Know how to identify and meet customers' requirements
4. Be able to promote benefits and features of tourism products and services
5. Know how to promote tourism-related products to customers
6. Know tourism-related products and services
7. Be able to close the sale
8. Know how to close the sale

Guided learning hours

It is recommended that **31** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 209

Outcome 1

Sell tourism-related products and services

Understand the process of selling products and services

Assessment Criteria

The learner can:

1. describe different customer types and their needs
2. describe how to use selling techniques to make sales
3. explain the importance of recording, processing and storing customer information to meet the organisation's and legal requirements
4. describe the main requirements of legislation which applies to selling to customers
5. explain the importance of following organisational policies and procedures
6. explain why it is important to ensure that information provided to customers is accurate and up-to-date
7. explain the consequences of misrepresentation during discussions with customers
8. describe responsibilities for giving information and advice under the organisation's minimum operating standards
9. describe suitable action to take where customers' queries cannot be answered
10. explain why follow-up with customers must comply with organisational and legal requirements
11. describe the organisation's requirements and any legal requirements for advising customers.

Unit 209

Outcome 2

Sell tourism-related products and services

Be able to identify and meet customers' requirements

Assessment Criteria

The learner can:

1. identify tourism **products** and **services** that best match the customers' needs
2. offer tourism **products** and **services** that best match the customers' needs
3. identify opportunities to sell extra tourism **products** and **services** to customers
4. offer suitable extra tourism **products** and **services** to customers
5. offer relevant alternatives to customers' requests
6. take **suitable action** when customers' needs can not be answered.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **three** from **products**
 - a) literature
 - b) souvenirs
 - c) tickets
 - d) maps
- **all** from **services**
 - a) visitor information
 - b) advice
 - c) directions
- **one** from **suitable action**
 - a) ask a colleague for assistance
 - b) refer customers to a suitable colleague
 - c) apologise for the inability to progress things further.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 209

Outcome 3

Sell tourism-related products and services

Know how to identify and meet customers' requirements

Assessment Criteria

The learner can:

1. describe suitable means of establishing customers' needs
2. explain how suitable tourism products and services can be identified and offered to customers.

Unit 209

Outcome 4

Sell tourism-related products and services

Be able to promote benefits and features of tourism products and services

Assessment Criteria

The learner can:

1. promote products and service benefits clearly, accurately and in a way which generates further interest from the customer
2. give customers opportunities to fully discuss and explore features and benefits of products and services
3. describe to the customer any terms, conditions and legal requirements relating to the sale
4. explain to customers, how the product(s) meet their needs.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

Unit 209

Outcome 5

Sell tourism-related products and services

Know how to promote tourism-related products to customers

Assessment Criteria

The learner can:

1. describe how to access and use current and reliable information sources relating to products and services
2. describe how to use selling techniques to make sales
3. explain why it is important to ensure that information provided to customers is accurate and up-to-date.

Assessment Criteria

The learner can:

1. describe the structure of the local tourism industry
2. describe the names and location of key geographical features in the local region and country including:
 - the most visited places
 - major tourist attractions
 - special events
3. describe the types of transport and tickets available in the local area
4. describe the differences between official gradings and categorisations for accommodation
5. describe the different types of accommodation
6. compare the different methods of booking and paying for accommodation
7. describe the main service providers and their products
8. describe commissions and booking fees including what they are, when they need to be applied and how to calculate them
9. identify the main industry trade associations, their main purposes and the benefits to customers
10. describe how to read and interpret maps to identify:
 - major seaports
 - tourist destinations
 - capital cities
 - major cities
 - any island groups of the country
11. describe how and when to use the phonetic alphabet
12. describe how to use and interpret brochures and timetables to provide information and costings
13. explain how to identify and interpret booking conditions and specific restrictions relating to the products and services offered by the organisation
14. describe any insurance attached to products and services sold.

Unit 209

Outcome 7

Sell tourism-related products and services

Be able to close the sale

Assessment Criteria

The learner can:

1. seek the customers' intention to buy at a suitable time in the discussion
2. positively reassure customers following their buying choice
3. sell extra tourism products and services effectively
4. provide customers with the total cost of all products and services
5. give the customer clear and accurate confirmation and reassurance, at the close of the sale
6. complete the sale to meet the organisation's procedures and legal requirements.

Unit 209

Outcome 8

Sell tourism-related products and services

Know how to close the sale

Assessment Criteria

The learner can:

1. describe how customers intention to buy can be identified
2. explain how the sale can be closed
3. identify additional tourism products and services that can be built onto initial sales.

Unit 210

Identify and provide tourism-related information and advice

Level: 2
Credit value: 5
NDAQ number: Y/601/5732

Unit aim(s)

This unit supports workforce development for those who provide tourism-related information and advice for visitors eg travel agents, tour operators, resort staff guides and tourist information staff. The unit is designed for use primarily by staff whose role entails providing information and advice and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **seven** outcomes to this unit. The candidate will:

1. Understand the principles of providing tourism-related information and advice
2. Be able to identify customers' information and advice needs
3. Know how to identify customer information and advice needs
4. Be able to source relevant tourism-related information and advice
5. Know how to source reliable tourism-related information
6. Be able to provide relevant tourism-related information and advice to customers
7. Know how to provide tourism-related information and advice to customers

Guided learning hours

It is recommended that **37** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Identify and provide tourism-related information and advice (approved as National Occupational Standard) unit TT14.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 210

Identify and provide tourism-related information and advice

Outcome 1

Understand the process of selling products and services

Assessment Criteria

The learner can:

1. explain why it is important to identify and interpret customers' needs
2. explain why it is essential to clarify the detail of a customer's needs
3. explain why it is important to be helpful and polite
4. explain the need for confidentiality and implications of data protection legislation
5. provide examples of typical tourist information enquiries
6. describe how the main provisions of data protection legislation affect the provision of tourism-related information and advice
7. describe how the main provisions of disability discrimination legislation affect the provision of tourism-related information and advice
8. describe organisational policies or requirements relating to providing advice and information to customers
9. describe any other legal requirements relating to providing advice and information to customers
10. explain why it is important to monitor customers' behaviour to identify any dissatisfaction
11. explain the consequences of misrepresentation during discussions with customers
12. explain why it is important to check that customers are satisfied with the information and advice they have been given.

Unit 210

Identify and provide tourism-related information and advice

Outcome 2

Be able to identify customers' information and advice needs

Assessment Criteria

The learner can:

1. identify customers' information needs clearly
2. confirm any uncertainties about customers' information and advice
3. explain to customers where any charges are made for the supply of information
4. confirm that customers are willing to pay for chargeable information prior to accessing it.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

Unit 210

Identify and provide tourism-related information and advice

Outcome 3

Know how to identify customer information and advice needs

Assessment Criteria

The learner can:

1. describe how customers' tourism-related information and advice needs can be identified
2. describe ways of clarifying and confirming customers' needs for information and advice
3. explain how to deal with dissatisfied customers
4. explain how to balance and acknowledge the needs of customers.

Unit 210

Identify and provide tourism-related information and advice

Outcome 4

Be able to source relevant tourism-related information and advice

Assessment Criteria

The learner can:

1. select suitable and reliable sources that will provide the information required by customers
2. access and use a range of tourism-related **information sources**
3. allocate time to balance the needs of the individual, other customers and the organisation when researching information and advice.

What you must do

The assessor must assess assessment criteria 1-3 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **five** from **information sources**
 - a) organisation specific reference materials
 - b) electronic sources
 - c) brochures
 - d) directories
 - e) timetables
 - f) maps
 - g) guidebooks
 - h) external organisations
 - i) other colleagues
 - j) leaflets.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 210

Identify and provide tourism-related information and advice

Outcome 5

Know how to source reliable tourism-related information

Assessment Criteria

The learner can:

1. describe a range of tourism-related information sources
2. identify external organisations that may be called upon for additional and specialist tourism-related information
3. describe how to access and use a range of tourism-related information sources
4. describe how to extract and present information for customers
5. give examples of information that is freely available and that which has a charge
6. describe how tourism-related information is updated and stored by the organisation
7. identify any colleagues that have specialist knowledge.

Unit 210

Identify and provide tourism-related information and advice

Outcome 6

Be able to provide relevant tourism-related information and advice to customers

Assessment Criteria

The learner can:

1. provide relevant, complete, accurate and up-to-date information and advice
2. confirm customers' understanding of the information and advice given to them
3. explain to customers any restrictions attached to products and services described
4. offer advice on a range of alternatives when the information that has been provided does not meet the customers' expectations.

Unit 210

Identify and provide tourism-related information and advice

Outcome 7

Know how to provide tourism-related information and advice to customers

Assessment Criteria

The learner can:

1. describe the main responsibilities for giving information and advice under current network minimum standards
2. describe how to use varied vocabulary and expressions to suit the purpose
3. describe how to adapt what and how much is said to suit different situations
4. describe how to show the customer is being listened to
5. describe how to identify customers' intentions
6. describe how to move a discussion forward
7. give examples of how to adapt language to suit the subject, purpose and the person being spoken to
8. explain how to structure what is said to help customers follow a line of thought or number of points clearly
9. describe how to use verbal or visual illustrations to help customers understand any points being made
10. describe how to confirm the customers' understanding and satisfaction with the information and advice provided.

Unit 211

Collect and maintain tourism information and data

Level: 2
Credit value: 3
NDAQ number: Y/601/6590

Unit aim(s)

This unit supports workforce development for those who collect and maintain information systems for access by colleagues eg customer buying trends, resort and hotel information, local events diary.

The unit is designed for use primarily by tour operators and tourist information staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

1. Understand the principles of maintaining tourism information and data
2. Be able to collect and evaluate tourism information and data
3. Understand how to research and collect tourism-related data and information
4. Be able to maintain tourism information systems and data
5. Know how to maintain tourism information and data

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Collect and maintain tourism information and data (approved as National Occupational Standard) unit TT15.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 211

Collect and maintain tourism information and data

Outcome 1

Understand the principles of maintaining tourism information and data

Assessment Criteria

The learner can:

1. explain why tourism information and data is needed and how it is used by organisations
2. describe the consequences of using out-of-date information and data
3. explain the need for confidentiality and the implications of data protection legislation in collecting tourism data
4. identify sources of reliable tourism information and data
5. identify suitable opportunities, methods and sources for collecting relevant information and data
6. describe own responsibilities for collecting and storing tourism data.

Unit 211

Collect and maintain tourism information and data

Outcome 2

Be able to collect and evaluate tourism information and data

Assessment Criteria

The learner can:

1. collect data and information at times and frequencies to meet research objectives
2. use a range of reliable **sources** and **methods** to collect tourism information and data to meet organisational needs
3. ensure that all information and data collected is accurate and up-to-date
4. record and present information in required formats.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **sources**
 - a) customers
 - b) suppliers
 - c) colleagues
 - d) directories
 - e) websites
 - f) newspapers and magazines
- at least **two** from **methods**
 - a) issuing questionnaires
 - b) manual counting
 - c) electronic counting
 - d) electronic inputting and recording
 - e) speaking to customers by telephone
 - f) speaking to customers face-to-face.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 211

Collect and maintain tourism information and data

Outcome 3

Understand how to research and collect tourism-related data and information

Assessment Criteria

The learner can:

1. compare advantages and disadvantages of a range of data collection methods
2. describe organisational requirements and procedures for:
 - recording data and information
 - grouping data and information into different categories
 - cross-referencing data and information
 - disposing of out-of-date information
 - locating tourist information within the organisation
 - the timing and frequency of updates
3. describe how to gather information from telephone calls and face-to-face conversations
4. describe how to use varied vocabulary and expressions to suit the subject, purpose and customer
5. describe how to adapt what and how much to say to suit different situations
6. describe how to show active listening and respond appropriately
7. describe how to identify customers' intentions
8. describe how to move a discussion forward
9. describe how to structure what to say to help customers follow a line of thought or number of points clearly
10. describe how to use verbal or visual illustrations to help customers understand any points you are making
11. describe how to use electronic inputting and recording systems
12. identify who to refer data and information handling problems.

Unit 211

Collect and maintain tourism information and data

Outcome 4

Be able to maintain tourism information systems and data

Assessment Criteria

The learner can:

1. use systems to safely and securely handle data and information
2. select a suitable location for storage of collected data
3. store data and information under relevant topic headings
4. make accurate and prompt updates to **information systems**
5. ensure that entries into the **information system(s)** are cross-referenced, accurate, up-to-date and easy to access
6. remove out-of-date data and information is removed from **information systems** promptly
7. dispose of out-of-date, damaged or unwanted information items following the organisation's waste disposal procedures.

What you must do

The assessor must assess assessment criteria 1-7 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **one** from **information systems**
 - a) for business performance data and information
 - b) for tourist information.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 211

Collect and maintain tourism information and data

Outcome 5

Know how to maintain tourism information and data

Assessment Criteria

The learner can:

1. describe how information and data is stored in paper-based and/or electronic systems
2. describe how filing and cross referencing systems enable users to access information and data
3. describe systems for the removal of out-of-date, damaged and unwanted data from storage systems.

Level: 2
Credit value: 3
NDAQ number: A/601/6596

Unit aim(s)

This unit supports workforce development for those who process tourism bookings for visitors eg tours of local heritage sites, visitor attractions, tours, accommodation. The unit is designed for use primarily by visitor services staff, perhaps in tourist information offices and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

1. Understand the importance of accuracy, security and legislation in processing bookings
2. Be able to complete booking administration for tourism services
3. Be able to process post-booking documentation
4. Be able to issue travel documents efficiently
5. Know how to make bookings

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Process tourism bookings (approved as National Occupational Standard) unit TT18.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 212

Process tourism bookings

Outcome 1

Understand the importance of accuracy, security and legislation in processing bookings

Assessment Criteria

The learner can:

1. explain why customer confidentiality and the security of personal information is important when processing tourism bookings
2. explain how current codes of practice and legislation affect retail transactions, booking conditions and insurance advice given to customers
3. describe the implications of relevant parts of current disability legislation when giving advice and information to customers
4. explain the consequences of booking errors
5. explain the implications of incorrectly issuing and processing documents
6. explain the consequences of misrepresentation of brochure amendments or updates during discussions with customers.

Unit 212

Outcome 2

Process tourism bookings

Be able to complete booking administration for tourism services

Assessment Criteria

The learner can:

1. make bookings that accurately match the details agreed with customers
2. process booking administration promptly following organisational procedures
3. store booking information and documentation securely following the organisational procedures and legal requirements.

What you must do

The assessor must assess assessment criteria 1-3 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **tourism services**
 - a) accommodation
 - b) event tickets
 - c) theatre tickets
 - d) excursions
 - e) transport
 - f) activities.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 212

Outcome 3

Process tourism bookings

Be able to process post-booking documentation

Assessment Criteria

The learner can:

1. ensure that relevant bookings have been confirmed by associated suppliers
2. issue correct booking documents to the relevant person(s)
3. update booking documents promptly and accurately as required
4. refer any issues beyond own responsibility or experience to the relevant person(s).

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

Unit 212

Outcome 4

Process tourism bookings

Be able to issue travel documents efficiently

Assessment Criteria

The learner can:

1. issue documents that match the **tourism services** booked
2. issue documents within required timescales and following organisational procedures
3. take prompt and suitable action to resolve document discrepancies before issue to customers
4. complete customer records fully and accurately
5. pass completed customer records promptly to the relevant person(s).

What you must do

The assessor must assess assessment criteria 1-5 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **tourism services**
 - a) accommodation
 - b) event tickets
 - c) theatre tickets
 - d) excursions
 - e) transport
 - f) activities.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Assessment Criteria

The learner can:

1. explain the meaning of basic terms and abbreviations used in booking documentation
2. describe terms, conditions and restrictions which may apply to tourism services
3. describe insurance provisions and costs associated with products being sold
4. describe the conditions associated with types of tickets available
5. describe methods for making documents available to customers
6. describe how to complete relevant insurance proposal forms
7. describe how to complete suppliers' booking documentation
8. identify the types of booking documentation that can be issued and completed in the workplace
9. describe how to complete tickets, vouchers and associated documentation accurately
10. describe the organisation's procedures for:
 - completing and processing manual and computer bookings
 - processing booking documentation
 - monitoring and logging bookings
11. identify the limits of responsibility for handling documentation discrepancies
12. identify who documentation discrepancies should be referred to.

Unit 215

Assist with travel and tourism problems and emergencies

Level: 2
Credit value: 4
NDAQ number: K/601/6559

Unit aim(s)

This unit supports workforce development for those to whom customers turn for help with problems and emergencies.

The unit is designed for use primarily by resort staff, tour operations staff and head office, tour leaders and others who can be expected to be involved in dealing with problems and emergencies. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **six** outcomes to this unit. The candidate will:

1. Understand the importance of assessing problems and emergencies
2. Be able to assist the resolution of a customer's problem
3. Know procedures for gathering, recording and reporting information about problems and emergencies
4. Be able to assist the local implementation of emergency procedures
5. Understand the actions to take in the event of problems and emergencies
6. Know how to communicate effectively with customers in problem and emergency situations

Guided learning hours

It is recommended that **32** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Assist with travel and tourism problems and emergencies, (approved as National Occupational Standard) unit TT09.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 215

Assist with travel and tourism problems and emergencies

Outcome 1

Understand the importance of assessing problems and emergencies

Assessment Criteria

The learner can:

1. explain why it is important to assess problems before taking action
2. identify features of problems that should be assessed
3. explain why it is important to assess emergencies before taking action
4. identify features of emergencies that should be assessed.

Unit 215

Assist with travel and tourism problems and emergencies

Outcome 2

Be able to assist the resolution of a customer's problem

Assessment Criteria

The learner can:

1. identify the nature of the customer's **problem**
2. confirm understanding of the **problem**
3. offer accurate information and advice promptly in a way that customers can easily understand
4. offer customers a choice of suitable solutions where available
5. reach an agreed solution that balances the needs of the customer with those of the organisation
6. maintain the goodwill of the customer
7. seek appropriate help from the relevant person(s) when necessary
8. complete all necessary records clearly and accurately.

What you must do

The assessor must assess assessment criteria 1-8 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at **two** from **problems**
 - a) itinerary
 - b) accommodation
 - c) personal property
 - d) documentation
 - e) standard of products and services
 - f) personal problems.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 215

Assist with travel and tourism problems and emergencies

Outcome 3

Know procedures for gathering, recording and reporting information about problems and emergencies

Assessment Criteria

The learner can:

1. outline the information that typically needs to be gathered and recorded about common travel and tourism problems
2. explain why prompt help and good communications with customers, colleagues and other affected parties is important
3. assess the consequences of failing to pass on information to everyone affected by emergencies
4. identify appropriate sources of information for dealing with customer problems
5. describe the importance of keeping people affected by emergencies up-to-date and re-assured
6. describe suitable means of recording and reporting details of problems and emergencies
7. describe organisational guidelines and procedures for handling problems and emergencies
8. identify the person(s) who should be contacted for help and advice
9. describe the circumstances in which other people should be contacted for help and advice.

Unit 215

Assist with travel and tourism problems and emergencies

Outcome 4

Be able to assist the local implementation of emergency procedures

Assessment Criteria

The learner can:

1. identify the main details of the emergency
2. follow instructions and allocated tasks throughout the situation
3. minimise inconvenience to customers and maintain goodwill
4. keep all people affected by the emergency up-to-date as instructed and offer re-assurance
5. seek additional help from relevant **persons** when necessary
6. maintain an appropriate balance between needs and individuals and needs of the group as a whole.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **people**
 - a) colleagues
 - b) customers directly affected by the emergency
 - c) customers not directly affected by the emergency
 - d) suppliers.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 215

Assist with travel and tourism problems and emergencies

Outcome 5

Understand the actions to take in the event of problems and emergencies

Assessment Criteria

The learner can:

1. describe solutions for common problems and emergencies that maintain customer morale and goodwill
2. describe how proposed solutions balance the needs of customers, colleagues and the organisation
3. describe the limits of own authority in assisting with problems and emergencies
4. describe when and how additional help can be obtained from relevant persons
5. describe the value of taking the correct action to maintain good customer relationships
6. describe the value, to the organisation, of customer goodwill in problem and emergency situations.

Unit 215

Assist with travel and tourism problems and emergencies

Outcome 6

Know how to communicate effectively with customers in problem and emergency situations

Assessment Criteria

The learner can:

1. describe how to adapt what and how much is said to customers in different situations
2. describe how to use verbal and visual signals to show that the customer is listening closely and responding appropriately
3. describe ways to identify customers' intentions
4. describe techniques that can help move a discussion forward
5. describe how to adapt language to suit the subject, purpose and person being spoken to
6. describe how to structure speech to help customers follow a line of thought or number of points clearly
7. describe how to use visual and verbal illustrations to help customers understand points being made.

Level: 2
Credit value: 5
NDAQ number: F/601/5949

Unit aim(s)

This unit supports workforce development for those who lead tours.

The unit is designed for use primarily by those who lead tours for visitors, eg local heritage sites, industrial sites, walking tours, bus tours and supports workforce development for those who carry out such activities.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

1. Understand the principles of leading people on guided tours
2. Be able to ensure the health and safety of the group
3. Be able to lead the tour
4. Be able to maintain group cohesion
5. Know how to lead people on a guided tour

Guided learning hours

It is recommended that **40** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the People 1st National Occupational Standards for Travel and Tourism.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 217

Outcome 1

Lead people on a guided tour

Understand the principles of leading people on guided tours

Assessment Criteria

The learner can:

1. explain the importance of maintaining good customer relations and goodwill
2. explain the importance of giving accurate information on route and timings before, during and at the conclusion of the tour
3. explain why it is important to brief customers fully on safety, welfare, local customs, environmental, religious and regulatory requirements
4. explain the importance of good time management when leading groups.

Unit 217

Outcome 2

Lead people on a guided tour

Be able to ensure the health and safety of the group

Assessment Criteria

The learner can:

1. correctly identify and record variations from existing assessments of hazard and risk
2. maintain customers' health, safety and security
3. ensure that tour clients are aware of, and alert to, hazards and potential risks
4. recognise customers' needs for physical assistance and for clarification of information and promptly act on these in suitable ways
5. confirm customers' understanding of **advice and guidance** given providing further clarification as necessary
6. ensure that all necessary emergency preparations are in place prior to the start of the tour.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **three** from **advice and guidance**
 - a) emergency procedures
 - b) safety hazards and potential risks en route
 - c) personal safety
 - d) security of personal belongings
 - e) clothing and footwear.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 217

Outcome 3

Lead people on a guided tour

Be able to lead the tour

Assessment Criteria

The learner can:

1. ensure that **customers** have an accurate and clear awareness of the intended route and timings, prior to starting the tour
2. follow the planned itinerary of the tour unless circumstances require **variations**
3. make **variations** to tour itineraries in response to local conditions and the needs of groups
4. inform the relevant person(s) of any factors likely to affect future tours.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **five** from **customers**
 - a) users of home language
 - b) users of foreign language
 - c) individuals
 - d) groups
 - e) subject specialist
 - f) general
 - g) one age group
 - h) mixed age group
 - i) through interpreter
 - j) direct with customers
- at least **two** from **variations**
 - a) before the tour
 - b) during the tour
 - c) in response to reasonable customer request
 - d) in response to hazard.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 217

Outcome 4

Lead people on a guided tour

Be able to maintain group cohesion

Assessment Criteria

The learner can:

1. ensure that the group keeps together throughout the tour
2. obtain the attention of the whole group quickly when needed
3. balance the needs of individuals with the needs of the whole group whenever possible
4. ensure that the group complies with local environmental, social and cultural expectations
5. deal with any disruptive individuals promptly, firmly and tactfully in suitable ways to minimise disruption.

Unit 217

Outcome 5

Lead people on a guided tour

Know how to lead people on a guided tour

Assessment Criteria

The learner can:

1. identify factors affecting group behaviour
2. identify likely causes and consequences of disruptions to the group and others
3. describe the likely consequences of both applying and not applying a range of common control procedures with disruptive customers
4. summarise the relevant parts of current legislation
5. explain how to compare the tour risk assessment against current conditions on the tour and customer group
6. explain how to assess risks and the importance of doing so on an ongoing basis throughout the tour
7. explain how age, customer mix and the size of group can affect the conduct of the tour
8. explain how to use and apply group management techniques, including those for handling disruptive customers
9. describe the health and safety advice and guidance relevant to the tour
10. describe the health and safety procedures applicable to the tour venue
11. outline the courses of action to take in the event of problems and emergencies
12. describe the tour route, sequence and timings and how these may be adapted to suit customers' needs and local conditions
13. identify local environmental, social and cultural expectations relevant to the conduct of your tour
14. summarise onward information for customers relevant to your tour
15. describe organisational procedures and requirements for the conduct of the tour, including how and when to make tour reports
16. describe organisational and any supplier procedures for dealing with disruptions
17. identify the limits of own authority for dealing with problems and emergencies

Unit 218

Present a commentary for a guided tour

Level: 2
Credit value: 4
NDAQ number: A/601/6470

Unit aim(s)

This unit supports workforce development for those who present scripted commentaries on guided tours for visitors, eg local orientation tours, bus tours

The unit is designed for use primarily by tour operator field staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

1. Understand the principles of presenting commentaries for guided tours
2. Be able to present a commentary to customers on a guided tour
3. Know how to present a commentary on a guided tour
4. Be able to evaluate, update and improve presentation to customers on a guided tour
5. Know how to evaluate, update and improve presentation to customers on a guided tour

Guided learning hours

It is recommended that **28** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Present a commentary for a guided tour (approved as National Occupational Standard) unit TT30.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 218

Outcome 1

Present a commentary for a guided tour

Understand the principles of presenting commentaries for guided tours

Assessment Criteria

The learner can:

1. explain why sensitivity is important and rapport needs to be created with customers
2. describe the characteristics and needs of different types of client groups in relation to a presentation
3. explain the need to react appropriately to current events, people and situations
4. explain the importance of encouraging and dealing with questions from the group
5. explain the consequences of providing inadequate and inaccurate information
6. explain the importance of repeating questions for the whole group
7. explain the importance of personal appearance when presenting tour commentaries
8. describe why, when and how presentation equipment is used.

Unit 218

Outcome 2

Present a commentary for a guided tour

Be able to present a commentary to customers on a guided tour

Assessment Criteria

The learner can:

1. present accurate information in commentaries
2. deliver commentaries within the time allowed
3. use **presentation aids** suitable for the immediate environment effectively and safely
4. maintain the interest of tour groups to enhance their enjoyment
5. encourage customers to ask questions, make comments and seek clarification at identified and suitable points
6. provide clear and accurate summaries and additional information when requested.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- **both** from **presentation aids**
 - a) microphone
 - b) raised voice.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 218

Outcome 3

Present a commentary for a guided tour

Know how to present a commentary on a guided tour

Assessment Criteria

The learner can:

1. describe the content of a fixed route commentary
2. describe how to determine success factors relevant to specific commentaries
3. identify organisational requirements that affect the way commentaries are presented to customers
4. describe any specific additional information that is likely to be requested by customers for the tour and commentary being delivered
5. describe where to access relevant information to update commentary
6. explain how to find out about tour groups
7. explain techniques for gaining and retaining the attention of tour groups
8. explain why group and self-positioning is important
9. identify suitable presentation aids
10. describe how to use tone, manner, pace, style and variety in commentaries
11. illustrate how to use the voice to achieve clarity, audibility and a variety of pitch and tone in a commentary
12. describe how to use non-verbal communication skills to maintain interest and emphasise the importance of specific subject matter
13. describe how to handle and use feedback.

Unit 218

Outcome 4

Present a commentary for a guided tour

Be able to evaluate, update and improve presentation to customers on a guided tour

Assessment Criteria

The learner can:

1. identify relevant success indicators for commentaries and its presentation
2. apply suitable methods to collect and record feedback from customers on the commentary
3. pass on any feedback that is relevant to other people promptly
4. make changes to improve commentary presentations as a result of feedback and self-assessment.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

Unit 218

Outcome 5

Present a commentary for a guided tour

Know how to evaluate, update and improve presentation to customers on a guided tour

Assessment Criteria

The learner can:

1. explain why self-evaluation is important in presenting commentaries
2. describe methods of collecting and prioritising relevant feedback
3. describe the procedure for forwarding feedback to others.

Level: 2
Credit value: 3
NDAQ number: A/601/5786

Unit aim(s)

This unit supports workforce development for those who display stock and information materials for visitors eg heritage sites, attractions, visitor centres, tourist information centres.

The unit is designed for use primarily by visitor services staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **four** outcomes to this unit. The candidate will:

1. Understand the value of displays in promoting products and services
2. Be able to prepare display areas and materials
3. Be able to set up and dismantle displays
4. Know how to display stock and materials

Guided learning hours

It is recommended that **24** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Display stock and materials (approved as National Occupational Standard) unit TT47.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 220

Outcome 1

Display stock and materials

Understand the value of displays in promoting products and services

Assessment Criteria

The learner can:

1. describe the value of displays in promoting new products
2. explain how placing products in specific places attracts attention and promotes sales
3. explain why it is important to check the accuracy and legality of information on labels
4. explain why it is important to check for potential health and safety hazards before and during the setting up of displays
5. explain why it is important to clean the materials and equipment used in displays and to dispose safely of any waste.

Unit 220

Outcome 2

Display stock and materials

Be able to prepare display areas and materials

Assessment Criteria

The learner can:

1. confirm the **requirements** for the display
2. ensure that the display area is the right size and in a suitable place
3. ensure that the right materials, equipment and stock needed for the **display** are available and they are clean and safe and in good working order
4. clean, clear and prepare the display area
5. report problems to the relevant person.

What you must do

The assessor must assess assessment criteria 1-5 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **requirements**
 - a) display items
 - b) stock and space
 - c) display position and dates
- at least **one** from **display**
 - a) providing information
 - b) promoting services
 - c) increasing sales.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 220

Outcome 3

Display stock and materials

Be able to set up and dismantle displays

Assessment Criteria

The learner can:

1. safely set up and dismantle displays to meet **organisational requirements** within the time allowed
2. ensure the safety of visitors during the display set-up process
3. ensure the display is, clean, tidy and safe for use
4. minimise waste from the display set up and waste disposed of safely and correctly
5. return display equipment and excess material to storage
6. complete the display to the required standard and this is confirmed with the correct person
7. report any suggested improvements to the display to the correct person.

What you must do

The assessor must assess assessment criteria 1-9 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- **two** from **organisational requirements**
 - a) materials and space availability
 - b) safety and security
 - c) standards of display.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 220

Outcome 4

Display stock and materials

Know how to display stock and materials

Assessment Criteria

The learner can:

1. describe the standards of cleaning and preparation of displays
2. summarise rights, duties and responsibilities under current legislation
3. describe how to identify what is required for displays from plans and sketches
4. identify where to get information about the required display
5. identify who can give advice and help to solve problems
6. explain the organisation's display standards
7. describe how to use space effectively when displaying products and information
8. describe how to check whether or not information on labels is accurate and legal
9. describe how to check for health and safety hazards and how to use equipment safely in relation to displays
10. describe how to check that equipment you need to use is in working order
11. describe how to identify and correct unsafe displays.

Level: 2

Credit value: 6

NDAQ number: M/601/1511

Unit aim

This unit is about what to do when it is difficult to meet customer expectations. Even if the service the learner gives is excellent, some customers experience problems. Part of the learner's job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because the customer's expectations involve more than the learner can offer or because service procedures have not been followed. Some problems are reported by customers and sometimes the learner will spot the problem first and resolve it before their customer has even noticed. As soon as the learner is aware of a problem, they need to consider the options and then choose a way to put it right. This unit is particularly important in customer service because many customers judge how good the customer service of the organisation is by the way problems are handled.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Spot customer service problems
2. Pick the best solution to resolve customer service problems
3. Take action to resolve customer service problems
4. Know how to resolve customer service problems

Guided learning hours

It is recommended that **40** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit directly relates to Unit C3 of the Customer Service NOS 2010

Support of the unit by a sector or other appropriate body

This unit is endorsed by the Institute of Customer Service.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Unit 221

Resolve customer service problems

Outcome 1

Spot customer service problems

Assessment Criteria

The learner can:

1. listen carefully to customers about any problem they have raised
2. ask customers about the problem to check their understanding
3. recognise repeated problems and alert the appropriate authority
4. share customer feedback with others to identify potential problems before they happen
5. identify problems with systems and procedures before they begin to affect customers.

Unit 221

Outcome 2

Resolve customer service problems

Pick the best solution to resolve customer service problems

Assessment Criteria

The learner can:

1. identify the options for resolving a customer service problem
2. work with others to identify and confirm the options to resolve a customer service problem
3. work out the advantages and disadvantages of each option for their customer and the organisation
4. pick the best option for their customer and the organisation
5. identify for their customer other ways that problems may be resolved if they are unable to help.

Unit 221

Resolve customer service problems

Outcome 3

Take action to resolve customer service problems

Assessment Criteria

The learner can:

1. discuss and agree the options for solving the problem with their customer
2. take action to implement the option agreed with their customer
3. work with others and their customer to make sure that any promises related to solving the problem are kept
4. keep their customer fully informed about what is happening to resolve the problem
5. check with their customer to make sure the problem has been resolved to the customer's satisfaction
6. give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction.

Unit 221

Resolve customer service problems

Outcome 4

Know how to resolve customer service problems

Assessment Criteria

The learner can:

1. describe organisational procedures and systems for dealing with customer service problems
2. explain how to defuse potentially stressful situations
3. describe how to negotiate
4. identify the limitations of what they can offer their customer
5. describe types of action that may make a customer problem worse and should be avoided.

Unit 223

Build and maintain relationships with customers not present

Level: 2
Credit value: 6
NDAQ number: F/601/6440

Unit aim(s)

This unit supports workforce development for those who deal with customers by telephone, SMS, web chat, email or other means that does not involve face-to-face contact.

The unit is designed for use primarily by tour operator and travel agency sales staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

1. Understand the importance of building and maintaining relationships with customers
2. Be able to establish contact with customers
3. Be able to communicate and inform customers effectively
4. Be able to manage difficult and demanding customers
5. Know how to manage accommodation and transfers

Guided learning hours

It is recommended that **51** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 223

Build and maintain relationships with customers not present

Outcome 1

Understand the importance of building and maintaining relationships with customers

Assessment Criteria

The learner can:

1. explain the importance of effective listening
2. explain the importance of maintaining continual interaction with customers
3. explain the importance of time management.

Unit 223

Build and maintain relationships with customers not present

Outcome 2

Be able to establish contact with customers

Assessment Criteria

The learner can:

1. ensure the quality of **communication links** with customers are confirmed
2. ensure that the purpose of the contact with customer is acknowledged
3. gather, record and assess all relevant customer information
4. acknowledge points raised and the responses given by customers
5. establish a respectful relationship with customers
6. meet the levels of service and quality required by the organisation
7. address any **special communication requirements** of the customers in line with the organisational procedures.

What you must do

The assessor must assess assessment criteria 1-7 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **communication links**
 - a) telephone
 - b) email
 - c) SMS
 - d) online chat
 - e) paper based
- at least **one** from **special communication requirements**
 - a) customers with hearing difficulties
 - b) customers with language difficulties.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 223

Build and maintain relationships with customers not present

Outcome 3

Be able to communicate and inform customers effectively

Assessment Criteria

The learner can:

1. confirm own understanding of **customers' requirements**
2. interact with customers at a suitable level and pace
3. manage switches between communication links to make the process as seamless as possible for customers
4. keep customers informed of relevant activities being undertaken as the interaction progresses
5. use **resources** effectively
6. provide information to customers in line with their needs
7. complete verbal conversations within set time frames and in line with the organisational requirements
8. inform customers when a colleague is monitoring a verbal conversation in line with the organisational requirements
9. explain to the customer the reason for transferring an interaction to a colleague giving the name of the person to whom they are being transferred
10. maintain appropriate levels of customer confidentiality throughout the interaction.

What you must do

The assessor must assess assessment criteria 1-10 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **customers requirements**
 - a) information
 - b) booking
 - c) complaint
- at least **two** from **resources**
 - a) communications equipment
 - b) information screens
 - c) materials
 - d) information
 - e) time.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 223

Build and maintain relationships with customers not present

Outcome 4

Be able to manage difficult and demanding customers

Assessment Criteria

The learner can:

1. put **difficult customers** at ease as soon as possible
2. address customers by name where it is appropriate to do so
3. accurately identify the specific needs of customers using **effective questioning**
4. manage the expectations of customers, whilst balancing their requirements with those of the organisation
5. resolve the needs of difficult customers using approved organisational procedures.

What you must do

The assessor must assess assessment criteria 1-5 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **difficult customers**
 - a) aggressive
 - b) abusive
 - c) confused
 - d) worried
 - e) insistent
- at least **two** from **effective questioning**
 - a) open
 - b) closed
 - c) probing.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 223

Build and maintain relationships with customers not present

Outcome 5

Know how to manage accommodation and transfers

Assessment Criteria

The learner can:

1. describe how to apply effective listening
2. identify when to use closed and probing questions suitable for different customers
3. identify techniques which demonstrate attentiveness and maintain customers' effective participation during different types of interaction
4. describe skills required to use the full range of communication links available and how to implement them effectively
5. describe ways to manage time that balance the requirements of the customers with those of the organisation
6. describe techniques that maintain control of interactions whilst maintaining a positive relationship with the customer
7. describe techniques for maintaining continual interaction with different customers
8. describe how to handle verbal conversations with customers with hearing difficulties
9. identify the organisation's accepted wording for greeting and communicating with customers
10. describe organisational procedures for dealing with difficult customers
11. describe organisational products and/or services within own area's of responsibility
12. outline the organisational procedures and facilities for addressing the needs of customers with special communications requirements
13. identify your organisational procedures for informing customers whenever colleagues are monitoring verbal conversation
14. describe the different levels of responsibility within the organisation.

Level: 2
Credit value: 3
NDAQ number: L/601/5727

Unit aim(s)

This unit supports workforce development for those who are responsible for keeping travel and destination information up-to-date and accurate.

The unit is designed for use primarily by travel agents, tourist information staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **three** outcomes to this unit. The candidate will:

1. Understand the principles of selling multi-sector air travel
2. Be able to research travel destination and product information
3. Know how to research travel destination and product information

Guided learning hours

It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the People 1st National Occupational Standards for Travel and Tourism.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 224

Outcome 1

Research travel and destination information

Understand the principles of selling multi-sector air travel

Assessment Criteria

The learner can:

1. explain the importance of collecting and recording data and information accurately
2. explain the importance of ensuring that data and information sources are reliable and current
3. explain why items of data and information are needed and how they will be used
4. explain why it is necessary to highlight gaps in sets of data and how such gaps can impact on conclusions.

Unit 224

Outcome 2

Research travel and destination information

Be able to research travel destination and product information

Assessment Criteria

The learner can:

1. collect useful data and information relating to **travel destinations** and **products**
2. use reliable **sources** of information that meet given research objectives
3. collect data and information using a variety of suitable methods to meet organisational requirements
4. **record** gaps in sets of data and assess their impact on conclusions
5. collect data and information at times and frequencies to meet research objectives
6. ensure that all data and information collected is accurate and up-to-date
7. accurately **record** data and present information in the required format
8. ensure data is stored securely using the organisation's information system(s) correctly and is available to appropriate colleagues.

What you must do

The assessor must assess assessment criteria 1-8 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **one** from **travel destinations**
 - a) domestic
 - b) overseas
- at least **two** from **products**
 - a) attractions
 - b) local transport
 - c) tourist facilities
- at least **one** from **recorded**
 - a) manually
 - b) electronically
- **both** from **sources**
 - a) printed
 - b) electronic.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 224

Outcome 3

Research travel and destination information

Know how to research travel destination and product information

Assessment Criteria

The learner can:

1. describe methods of collecting data and information and their advantages and disadvantages
2. describe how to gather information from telephone calls, face-to-face conversations, printed documents, electronic and on-line sources
3. explain how to check the validity and currency of data and information
4. identify where to access and when to use reliable data and information
5. explain how to use electronic inputting and recording systems
6. identify when to seek additional sources to verify information
7. explain how support can be obtained to deal with verification problems
8. describe the variety of topics on which customers typically require information
9. explain how to use organisational data and information systems
10. outline organisational requirements and procedures for:
 - recording and storing data and information
 - processing data and information
 - presenting the outcomes of research
 - disposal of data which is inaccurate, out-of-date or irrelevant.

Unit 226

Build and maintain face-to-face relationships with customers

Level: 2
Credit value: 5
NDAQ number: T/601/6595

Unit aim(s)

This unit supports workforce development for those who greet customers in retail travel agencies and on behalf of tour operators.

The unit is designed for use primarily by retail travel agents, tour operators' resort staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

1. Understand the principles of face-to-face relationships with customers
2. Be able to greet customers face-to-face
3. Be able to establish rapport with customers
4. Be able to maintain and build established relationships with customers
5. Know how to maintain and build face-to-face relationships with customers

Guided learning hours

It is recommended that **42** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 226

Build and maintain face-to-face relationships with customers

Outcome 1

Understand the principles of face-to-face relationships with customers

Assessment Criteria

The learner can:

1. explain the importance of listening and building rapport
2. explain the importance of following up calls/meetings
3. describe the influence of different cultures and backgrounds on face-to-face relationships
4. explain the importance of complying with equality requirements when serving customers with specific needs.

Unit 226

Build and maintain face-to-face relationships with customers

Outcome 2

Be able to greet customers face-to-face

Assessment Criteria

The learner can:

1. acknowledge and **greet** customers promptly and in accordance with company policies
2. establish customers' needs and wants quickly and sensitively
3. refer customers promptly to more appropriate members of staff where necessary and explain the reasons for referral
4. maintain necessary **confidentiality**
5. acknowledge customers where delay in greeting is unavoidable and, where possible, give apologies.

What you must do

The assessor must assess assessment criteria 1-5 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **one** from **greet**
 - a) in person
- **both** from **confidentiality**
 - a) of organisation information
 - b) of customer information.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 226

Build and maintain face-to-face relationships with customers

Outcome 3

Be able to establish rapport with customers

Assessment Criteria

The learner can:

1. establish customers' confidence in your professionalism
2. use appropriate language and gestures to suit the needs of customers
3. speak clearly to customers and **pitched** communication to suit their needs
4. ensure that customers feel at ease.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **pitch**
 - a) vocabulary used
 - b) speed of speech
 - c) use of technical language.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 226

Build and maintain face-to-face relationships with customers

Outcome 4

Be able to maintain and build established relationships with customers

Assessment Criteria

The learner can:

1. greet returning customers by name where appropriate
2. establish and confirm customers' needs before taking appropriate action
3. take appropriate opportunities to confirm mutual understanding of customers' needs and potential means of meeting them
4. maintain goodwill by explaining any delay in responding to customers' needs
5. carry out any undertakings made to customers within the promised time
6. update customer records accurately and promptly.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

Unit 226

Build and maintain face-to-face relationships with customers

Outcome 5

Know how to maintain and build face-to-face relationships with customers

Assessment Criteria

The learner can:

1. describe the effects of body language
2. illustrate variations in the language to use when speaking to different customers
3. describe how to greet people formally and informally
4. describe how to treat guest as individuals
5. describe how to relate information to customers
6. summarise the organisation's policies on greeting and communicating with customers face-to-face
7. identify the organisation's requirements concerning customer records.

Level: 3
Credit value: 3
NDAQ number: D/601/6610

Unit aim(s)

This unit supports workforce development for those who manage business travel accounts for clients.

The unit is designed for use primarily by agents in business travel houses and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **four** outcomes to this unit. The candidate will:

1. Understand the value of accurate account tracking and management
2. Be able to obtain personal travel details
3. Be able to compile and maintain personal travel profiles
4. Know how to build and maintain personal travel profiles

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - www.people1st.co.uk.

Unit 311

Outcome 1

Build and maintain customers' profiles

Understand the value of accurate account tracking and management

Assessment Criteria

The learner can:

1. explain the benefits of travel profiling
2. explain the importance of keeping files up-to-date and circumstances which, will require an update
3. explain the importance of recording data accurately
4. explain the importance of ensuring profiles are compatible with travel offers and supplier availability
5. explain why it is important to check profile details and agree changes with the relevant person
6. explain the need for confidentiality and the implications of the data protection legislation.

Unit 311

Outcome 2

Build and maintain customers' profiles

Be able to obtain personal travel details

Assessment Criteria

The learner can:

1. obtain accurate and up-to-date personal **contact details**
2. add accurate and up-to-date personal **contact details** to profiles
3. maintain the traveller's **personal travel preferences** and **travel document data** so that it is accurate and up-to-date
4. confirm that any information to be used is still accurate and current prior to compiling or updating the traveller's profile
5. keep all information secure and available only to authorised people following organisational procedures
6. apply cost-effective, time-efficient and ethical means to gather, store and retrieve customer information
7. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes.

What you must do

The assessor must assess assessment criteria 1-7 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **four** from **contact details**
 - a) name and title
 - b) relevant address/es
 - c) telephone numbers
 - d) electronic communication details
 - e) organisation department
- at least **four** from **personal travel preferences**
 - a) seating
 - b) room type
 - c) car hire
 - d) airline
 - e) departure airport
 - f) smoking
 - g) diet
 - h) mobility requirements
 - i) visual and hearing requirements
- at least **four** from **travel document data**
 - a) passport number and expiry date
 - b) nationality
 - c) visa's held
 - d) vaccination certificates held and expiry dates

- e) restricted entry endorsements
- f) insurance details.

Evidence for the remaining points under '**what you must cover**' may be assessed through questioning or witness testimony.

Unit 311

Outcome 3

Build and maintain customers' profiles

Be able to compile and maintain personal travel profiles

Assessment Criteria

The learner can:

1. accurately record and update personal travel document data in response to changes
2. check that travellers' profiles are compatible with the organisation's travel offer and supplier availability
3. ensure profile contents accurately reflect customers' requirements and preferences within the boundaries of any agreed travel policies
4. agree traveller profiles with the relevant person(s) prior to inputting the information on the organisation's system
5. maintain traveller profiles in the required format
6. store the completed and agreed profiles securely, following organisational procedures
7. make profiles available and accessible to all authorised people
8. check that customers' profiles are fit for purpose and adjust collection and analysis processes as necessary.

What you must do

The assessor must assess assessment criteria 1-8 by directly observing the candidate's work.

Unit 311

Outcome 4

Build and maintain customers' profiles

Know how to build and maintain personal travel profiles

Assessment Criteria

The learner can:

1. describe a variety of different customers and their real and perceived travel needs
2. explain how and where to access detailed information on supplier' products and services
3. identify sources of personal information from within customer organisations
4. describe the type, quantity and quality of personal information to collect
5. identify the relevant person who can confirm the accuracy of data
6. describe customers' agreed and current travel policy
7. explain the required format for personal profiles
8. identify who has access to personal profiles
9. outline organisational security procedures for keeping personal data safe and secure
10. explain how to access and use organisation's Global Distribution System (GDS).

Unit 331

Ensure responsibility for actions to reduce risks to health and safety

Level: 3

Credit value: 4

NDAQ number: A/601/5867

Unit aim

The aim of this unit is to provide candidates with the knowledge, understanding and skills to understand their health and safety responsibilities in the workplace.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

1. Be able to identify the hazards and evaluate the risks in the workplace
2. Be able to reduce the risks to health and safety in the workplace
3. Know how to reduce risks to health and safety in the workplace

Guided learning hours

It is recommended that **38** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is supported by Pro Skills.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Unit 331

Ensure responsibility for actions to reduce risks to health and safety

Outcome 1

Be able to identify the hazards and evaluate the risks in the workplace

Assessment Criteria

The learner can:

1. identify workplace instructions that are relevant to them and their job role
2. identify working practices and hazards in the workplace that could be harmful
3. evaluate the hazards and prioritise in risk order
4. report hazard(s) to the responsible person.

Unit 331

Ensure responsibility for actions to reduce risks to health and safety

Outcome 2

Be able to reduce the risks to health and safety in the workplace

Assessment Criteria

The learner can:

1. perform work activities at own level of competence in accordance with identified health and safety:
 - workplace policies
 - instructions and procedures
 - suppliers and manufacturers' information
 - and relevant legal requirements
2. manage hazards in accordance with workplace instructions and legal requirements
3. report any differences between workplace instructions and supplier/manufacture instructions.

Unit 331

Ensure responsibility for actions to reduce risks to health and safety

Outcome 3

Know how to reduce risks to health and safety in the workplace

Assessment Criteria

The learner can:

1. explain their responsibility in remaining alert to hazards and risks
2. describe own responsibilities and scope for action in controlling risk
3. explain the importance of adhering to health and safety policies and practices
4. describe where and when to get additional health and safety assistance
5. describe the importance of personal presentation and behaviour in maintaining health and safety in the workplace.

Appendix 1 Relationships to other qualifications

Links to other qualifications and frameworks

City & Guilds has identified the connections to previous qualifications. This mapping is provided as guidance and suggests areas of overlap and commonality between the qualifications. It does not imply that candidates completing units in one qualification are automatically covering all of the content of the qualifications listed in the mapping.

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications. For example, units within a QCF qualification may be similar in content to units in the NQF qualification which the candidate may have already undertaken and this may present opportunities for APL.

This qualification has connections to the:

- Level 2 NVQ in Travel and Tourism Services (4847)

NQF units		QCF units	
Unit Number/Title		Unit Number/Title	
Unit 201	(T6) Give customers a positive impression of yourself and your organisation – (ICS Unit 1, Level 2)	Unit 201	Give customers a positive impression of yourself and your organisation
Unit 202	(T7) Ensure your own actions reduce risks to health and safety – (ENTO Unit A)	Unit 331	Ensure responsibility for actions to reduce risks to health and safety
Unit 203	(T10) Develop and maintain your effectiveness at work – (HABIA Unit G8, Level 2)	Unit 203	Develop and maintain your effectiveness at work
Unit 204	(T19) Help customers to choose and book travel services		
Unit 205	(T11) Arrange non-multi-sector air travel		
Unit 206	(T3) Process travel and tourism services payments	Unit 206	Process travel and tourism services payments
Unit 207	(T4) Assist customers prior to and after travelling		
Unit 208	(T5) Assist with travel and tourism promotion	Unit 208	Set up and maintain promotional displays
Unit 209	(T13) Sell tourism products and services	Unit 209	Sell tourism-related products and services
Unit 210	(T14) Identify and provide tourism related information and advice	Unit 210	Identify and provide tourism related information and advice
Unit 211	(T15) Collect and maintain tourism information and data	Unit 211	Collect and maintain tourism information and data

Unit 212	(T18) Process tourism bookings	Unit 212	Process tourism bookings
Unit 213	(T20) Contribute to developing and maintaining positive caller relationships – (e-skills UK, Unit 0601, Level 2)		
Unit 214	(T2) Process travel services bookings		
Unit 215	(T9) Assist with travel and tourism problems and emergencies	Unit 215	Assist with travel and tourism problems and emergencies
Unit 216	(T28) Plan and conduct welcoming events		
Unit 217	(T29) Lead people on a guided tour	Unit 217	Lead people on a guided tour
Unit 218	(T30) Present a commentary for a guided tour	Unit 218	Present a commentary for a guided tour
Unit 219	(T31) Carry out airport transfers		
Unit 220	(T47) Display stock to promote sales to customers – (Skillsmart Unit C2, Level 2)	Unit 220	Display stock and materials
Unit 221	(T48) Resolve customer service problems – (ICS Unit 4, Level 2)	Unit 221	
Unit 222	(T36) Prepare and maintain holiday accommodation		
		Unit 223	Build and maintain relationships with customers not present
		Unit 224	Research travel and destination information
		Unit 226	Build and maintain face-to-face relationships with customers
		Unit 311	Build and maintain customers' profiles

Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Providing City & Guilds qualifications – a guide to centre and qualification approval

contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve ‘approved centre’ status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- ***Walled Garden***
Find out how to register and certificate candidates on line
- ***Qualifications and Credit Framework (QCF)***
Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- ***Events***
Contains dates and information on the latest Centre events
- ***Online assessment***
Contains information on how to register for GOLA assessments.

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Useful contacts

Type	Contact	Query
UK learners	T: +44 0844 543 0000 E: learnersupport@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
Centres	T: +44 (0)20 7294 2787 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Registrations/enrolment • Certificates • Invoices • Missing or late exam materials • Nominal roll reports • Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Results • Certification • Missing or late exam materials • Incorrect exam papers • Forms request (BB, results entry) • Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	<ul style="list-style-type: none"> • Results • Entries • Enrolments • Invoices • Missing or late exam materials • Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	<ul style="list-style-type: none"> • Re-issue of password or username • Technical problems • Entries • Results • GOLLA • Navigation • User/menu option problems
Employer	T: +44 (0)121 503 8993 E: business_unit@cityandguilds.com	<ul style="list-style-type: none"> • Employer solutions • Mapping • Accreditation • Development Skills • Consultancy
Publications	T: +44 (0)20 7294 2850 F: +44 (0)20 7294 3387	<ul style="list-style-type: none"> • Logbooks • Centre documents • Forms • Free literature

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: feedbackandcomplaints@cityandguilds.com

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