

Level 2 NVQ Diploma in Travel Services (4927-21/22/23)

Qualification handbook for centres

500/9722/2

Leisure and Business

Tour Operators (Head Office)

Tour Operators (Field Staff)



About City & Guilds

City & Guilds is the UK's leading provider of vocational qualifications, offering over 500 awards across a wide range of industries, and progressing from entry level to the highest levels of professional achievement. With over 8500 centres in 100 countries, City & Guilds is recognised by employers worldwide for providing qualifications that offer proof of the skills they need to get the job done.

City & Guilds Group

The City & Guilds Group includes City & Guilds, ILM (the Institute of Leadership & Management, which provides management qualifications, learning materials and membership services), City & Guilds NPTC (which offers land-based qualifications and membership services) and City & Guilds Centre for Skills Development. City & Guilds also manages the Engineering Council Examinations on behalf of the Engineering Council.

Equal opportunities

City & Guilds fully supports the principle of equal opportunities and we are committed to satisfying this principle in all our activities and published material. A copy of our equal opportunities policy statement is available on the City & Guilds website.

Copyright

The content of this document is, unless otherwise indicated, © The City and Guilds of London Institute and may not be copied, reproduced or distributed without prior written consent.

However, approved City & Guilds centres and candidates studying for City & Guilds qualifications may photocopy this document free of charge and/or include a PDF version of it on centre intranets on the following conditions:

- centre staff may copy the material only for the purpose of teaching candidates working towards a City & Guilds qualification, or for internal administration purposes
- candidates may copy the material only for their own use when working towards a City & Guilds qualification

The *Standard Copying Conditions* (which can be found on the City & Guilds website) also apply.

Please note: National Occupational Standards are not © The City and Guilds of London Institute. Please check the conditions upon which they may be copied with the relevant Sector Skills Council.

Publications

City & Guilds publications are available on the City & Guilds website or from our Publications Sales department at the address below or by telephoning +44 (0)20 7294 2850 or faxing +44 (0)20 7294 3387.

Every effort has been made to ensure that the information contained in this publication is true and correct at the time of going to press. However, City & Guilds' products and services are subject to continuous development and improvement and the right is reserved to change products and services from time to time. City & Guilds cannot accept liability for loss or damage arising from the use of information in this publication.

City & Guilds

1 Giltspur Street

London EC1A 9DD

T (+44) 0844 543 0000

F (+44) 0207 294 2413

www.cityandguilds.com

centresupport@cityandguilds.com

Level 2 NVQ Diploma in Travel Services (4927-21/22/23)

Qualification handbook for centres

www.cityandguilds.com
September 2010
Version 1.4 (June 2013)

Qualification title	Number	QAN
Level 2 NVQ Diploma in Travel Services		
<ul style="list-style-type: none">Leisure and Business	4927-21	500/9722/2
<ul style="list-style-type: none">Tour Operators (Head Office)	4927-22	500/9722/2
<ul style="list-style-type: none">Tour Operators (Field Staff)	4927-23	500/9722/2

Version and date	Change detail	Section
1.2 Jan 2012	Unit 224 credit value corrected	Units
1.3 March 2012	Typographical errors	Various
1.4 June 2013	Correct optional units in RoC (Tour Operators – Field Staff)	Structure

City & Guilds
Skills for a brighter future



www.cityandguilds.com

Contents

1	Introduction to the qualification	5
2	Centre requirements	12
3	Course design and delivery	14
4	Assessment	15
5	Units	17
Unit 201	Give customers a positive impression of yourself and your organisation	19
Unit 203	Develop and maintain your effectiveness at work in a travel and tourism environment	26
Unit 204	Help customers to choose and book travel services	32
Unit 205	Arrange non multi-sector air travel	46
Unit 206	Process travel and tourism services payments	52
Unit 207	Assist customers prior to and after travelling	58
Unit 208	Set up and maintain promotional displays	64
Unit 209	Sell tourism-related products and services	70
Unit 210	Identify and provide tourism-related information and advice	80
Unit 211	Collect and maintain tourism information and data	88
Unit 214	Process travel services bookings	94
Unit 215	Assist with travel and tourism problems and emergencies	100
Unit 216	Plan and conduct welcoming events	108
Unit 217	Lead people on a guided tour	116
Unit 218	Present a commentary for a guided tour	122
Unit 219	Assist with transfers	128
Unit 221	Resolve customer service problems	134
Unit 222	Prepare and maintain holiday accommodation	140
Unit 223	Build and maintain relationships with customers not present	146
Unit 224	Research travel and destination information	152
Unit 225	Arrange travel itineraries	156
Unit 226	Build and maintain face-to-face relationships with customers	162
Unit 227	Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector	168
Unit 326	Complete foreign exchange transactions	172
Unit 327	Obtain and analyse customer feedback	182
Unit 331	Ensure responsibility for actions to reduce risks to health and safety	188
Appendix 1	Relationships to other qualifications	192
Appendix 2	Sources of general information	194

City & Guilds
Skills for a brighter future



www.cityandguilds.com

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 Diploma in Travel Services
City & Guilds qualification number	(4927-21/22/23)
Qualification accreditation number	500/9722/2
Last registration date	31/07/2013
Last certification date	31/07/2015

Area	The Level 2 NVQ Diploma in Travel Services...
Who is the qualification for?	... meets the needs of candidates who work or want to work as a travel consultant in the travel 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 travel services sector.
Is the qualification part of a framework or initiative?	... is the part of the Travel Services Apprenticeship framework.
Why has the qualification been developed?	... replaces the City & Guilds Level 2 NVQ in Travel and Tourism Services (4847) which expires on 31/08/2010.

This qualification is suitable for those candidates already working in the travel industry and looking to continue to grow their career in a travel agency, head office tour operators or at resorts. This qualification offers candidates the choice of three pathways in leisure and business, tour operators (head office) or tour operators (field staff). All three pathways are now part of the travel services apprenticeships.

1.1 Qualification structure

To achieve the Level 2 NVQ Diploma in Travel Services, learners must achieve 13 credits from the mandatory units and choose one pathway to complete the qualification, see diagrams 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 in a travel and tourism environment	Mandatory	4	N/A
M/601/6580	Unit 204	Help customers to choose and book travel services	Optional	16	N/A
D/601/6560	Unit 205	Arrange non-multi-sector air travel	Optional	5	N/A
D/601/5151	Unit 206	Process travel and tourism services payments	Optional	3	N/A
T/601/5723	Unit 207	Assist customers prior to and after travelling	Optional	4	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/601/6548	Unit 214	Process travel services bookings	Optional	5	N/A
K/601/6559	Unit 215	Assist with travel and tourism problems and emergencies	Optional	4	N/A
D/601/5778	Unit 216	Plan and conduct welcoming events	Optional	5	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
Y/601/6556	Unit 219	Assist with transfers	Optional	4	N/A
M/601/1511	Unit 221	Resolve customer service problems	Optional	6	N/A
H/601/5782	Unit 222	Prepare and maintain holiday accommodation	Optional	4	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
J/601/5760	Unit 225	Arrange travel itineraries	Optional	7	N/A
T/601/6595	Unit 226	Build and maintain face-to-face relationships with customers	Optional	5	N/A
T/601/7214	Unit 227	Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector	Optional	2	N/A
Y/601/5746	Unit 326	Complete foreign exchange transactions	Optional	7	N/A

D/601/6607	Unit 327	Obtain and analyse customer feedback	Optional	4	N/A
A/601/5867	Unit 331	Ensure responsibility for actions to reduce risks to health and safety	Mandatory	4	N/A

LEISURE AND BUSINESS

13 mandatory credits from:

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

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

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

Minimum of 5 credits from:

Unit 204
Help customers to choose and book travel services (16 credits)

Unit 205
Arrange non-multi-sector air travel (5 credits)

19 credits from:

Unit 204
Help customers to choose and book travel services (16 credits)

Unit 205
Arrange non-multi-sector air travel (5 credits)

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

Unit 207
Assist customers prior to and after travelling (4 credits)

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

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

Unit 224
Research travel destination information (3 credits)

Unit 225
Arrange travel itineraries (7 credits)

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

Unit 227
Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector (2 credits)

Unit 326
Complete foreign exchange transactions (7 credits)

Unit 327
Obtain and analyse customer feedback (4 credits)

TOUR OPERATORS (HEAD OFFICE)

13 mandatory credits from:

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

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

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

6 credits from:

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

18 credits from:

Unit 205
Arrange non-multi-sector air travel (5 credits)

Unit 207
Assist customers prior to and after travelling (4 credits)

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

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

Unit 214
Process travel services bookings (5 credits)

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

Unit 225
Arrange travel itineraries (7 credits)

Unit 227
Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector (2 credits)

TOUR OPERATORS (FIELD STAFF)

13 mandatory credits from:

Unit 201 Give customers a positive impression of yourself and your organisation (5 credits)	Unit 331 Ensure responsibility for actions to reduce risks to health and safety (4 credits)	Unit 203 Develop and maintain your effectiveness at work in a travel and tourism environment (4 credits)
---------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------

4 credits from:

Unit 216 Plan and conduct welcoming events (5 credits)	Unit 219 Assist with transfers (4 credits)	Unit 222 Prepare and maintain holiday accommodation (4 credits)
--------------------------------------------------------------	--------------------------------------------------	-----------------------------------------------------------------------

20 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 216 Plan and conduct welcoming events (5 credits)	Unit 217 Lead people on a guided tour (5 credits)
Unit 218 Present a commentary for a guided tour (4 credits)	Unit 221 Resolve customer service problems (6 credits)
Unit 222 Prepare and maintain holiday accommodation (4 credits)	Unit 226 Build and maintain face-to-face relationships with customers (5 credits)
Unit 227 Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector (2 credits)	

1.2 Opportunities for progression

On completion of this Level 2 NVQ Diploma in Travel Services candidates may progress into the following City & Guilds qualifications:

- City & Guilds Level 2 NVQ Certificate in Tourism Services
- City & Guilds Level 3 NVQ Diploma in Travel Services
- City & Guilds Level 3 NVQ Certificate in Tourism Services
- City & Guilds Level 2 Diploma in Travel and Tourism
- City & Guilds Level 3 Diploma in Travel and Tourism
- City & Guilds Level 3 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 (SP024927)
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 – 01/02/03/04/05) will receive automatic approval for the new Level 2 NVQ Diploma in Travel 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 in a travel and tourism environment	D/601/9345	4
204	Help customers to choose and book travel services	M/601/6580	16
205	Arrange non multi-sector air travel	D/601/6560	5
206	Process travel and tourism services payments	D/601/5151	3
207	Assist customers prior to and after travelling	T/601/5723	4
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
214	Process travel services bookings	A/601/6548	5
215	Assist with travel and tourism problems and emergencies	K/601/6559	4
216	Plan and conduct welcoming events	D/601/5778	5
217	Lead people on a guided tour	F/601/5949	5
218	Present a commentary for a guided tour	A/601/6470	4
219	Assist with transfers	Y/601/6556	4
221	Resolve customer service problems	M/601/1511	6
222	Prepare and maintain holiday accommodation	H/601/5782	4
223	Build and maintain relationships with customers not present	F/601/6440	6

224	Research travel and destination information	L/601/5727	3
225	Arrange travel itineraries	J/601/5760	7
226	Build and maintain face-to-face relationships with customers	T/601/6595	5
227	Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector	T/601/7214	2
326	Complete foreign exchange transactions	Y/601/5746	7
327	Obtain and analyse customer feedback	D/601/6607	4
331	Make sure your own actions 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:

1. Be able to establish rapport with customers
2. Be able to respond appropriately to customers
3. Be able to 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 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

Be able to 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

Be able to 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

Be able to 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.

This page is intentionally blank

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 least **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
- and **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 misunderstanding 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.

Unit 204

Help customers to choose and book travel services

Level: 2
Credit value: 16
NDAQ number: M/601/6580

Unit aim

This unit supports workforce development for those who help customers make travel bookings for customers who have a clear idea of what they need eg travel only, package holiday. The unit is designed for use primarily by leisure travel agents 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 **twelve** outcomes to this unit. The candidate will:

1. Understand the principles of helping customers choose and book travel services
2. Be able to help customers select travel services to meet their needs
3. Know about worldwide travel destinations
4. Know about travel services
5. Be able to capture and process customer information
6. Know how to capture and process customer information
7. Be able to complete travel services bookings
8. Know how to complete travel services bookings
9. Understand the importance of accuracy and security in making travel bookings for customers
10. Be able to process post-booking documentation
11. Be able to receive, prepare and issue travel documentation
12. Know how to receive, prepare and issue travel documentation

Guided learning hours

It is recommended that **120** 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 travel services bookings (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 204

Help customers to choose and book travel services

Outcome 1

Understand the principles of helping customers choose and book travel services

Assessment Criteria

The learner can:

1. explain why customer confidentiality must be maintained
2. explain why it is important to ensure that information provided to customers is accurate and up-to-date
3. explain the importance of accuracy and security in keeping records of bookings
4. describe the consequences of misrepresentation during discussions with customers
5. describe the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers
6. describe the value of customer information in:
 - establishing current trends in travel and tourism customers' wants and needs
 - tailoring offers to specific customers' profiles
 - maintaining contact with customers and building customer loyalty.
7. explain the main requirements of legislation affecting the collection, storage and use of personal information
8. explain the importance of following organisational systems for recording and processing information.

Unit 204

Help customers to choose and book travel services

Outcome 2

Be able to help customers select travel services to meet their needs

Assessment Criteria

The learner can:

1. use suitable techniques to identify, clarify and summarise customers' **travel needs**
2. calculate total costs of travel arrangements
3. obtain customer's acceptance of the proposed arrangements.

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 **three** from **travel needs**
 - a) package holidays
 - b) accommodation only
 - c) ferry travel only
 - d) flight only.

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

Unit 204

Help customers to choose and book travel services

Outcome 3

Know about world-wide travel destinations

Assessment Criteria

The learner can:

1. identify the location of the most visited outbound destinations in the world for UK visitors
2. identify the location of major tourist attractions and special events in the UK, Europe and throughout the world
3. identify the types of currency in use in major tourist destinations worldwide
4. identify the official languages in use in major tourist destinations worldwide
5. describe the types of climate found in major tourist destinations worldwide
6. identify world time zones and describe their impact on customers
7. describe passport and visa types
8. identify where to find information on visa and passport entry requirements
9. identify what information to give customers to enable them to find out current mandatory and recommended health precautions and regulations
10. describe the different entry requirements for EU and non-EU passport holders to major tourist destinations worldwide
11. explain how to read and interpret maps to identify major seaports and airports, tourist destinations, capital cities, major cities and country groups in the UK, Europe and throughout the world.

Unit 204

Help customers to choose and book travel services

Outcome 4

Know about travel services

Assessment Criteria

The learner can:

1. describe the elements that make up travel packages
2. describe the organisation's position on preferred operators
3. explain car rental terms and abbreviations
4. describe the main conditions of car rental including eligibility (eg age, endorsements)
5. describe the car insurance provision offered by the car hire suppliers used by the organisation, including collision damage waiver, personal accident insurance and top ups
6. identify sources of information on major parking operators at the main UK airports
7. identify sources of information on airport taxi and transport arrangements to major UK departure points
8. describe types of travel insurance available including amounts of cover, conditions, exclusions and excesses
9. explain what ATOL stands for
10. describe ATOL protection and identify which products are and are not covered
11. describe the meaning of basic terms and abbreviations used on travel documentation
12. describe the booking terms and conditions and any restrictions applying to travel and additional services
13. identify 3-letter airport codes and describe how to encode and decode them
14. describe the types of tickets available for travel services and any conditions attached to their issue
15. identify where to find accurate and up-to-date information to support booking.

Unit 204

Help customers to choose and book travel services

Outcome 5

Be able to capture and process customer information

Assessment Criteria

The learner can:

1. obtain **customer** consent to **record** the necessary **information**
2. maintain good customer relations when objections to personal **information** being recorded are raised
3. **record customer information** quickly and in the correct format
4. **process and store customer information** to meet organisational and legal requirements
5. maintain the confidentiality of **customer information**.

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 **customers**
 - a) individual
 - b) organisation
 - c) small group
- at least **one** from **record**
 - a) manually
 - b) electronically
- at least **one** from **information**
 - a) customer contact details
 - b) product enquiries
 - c) relevant interests
- and at least **one** from **process and store**
 - a) manually
 - b) electronically.

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

Unit 204

Help customers to choose and book travel services

Outcome 6

Know how to capture and process customer information

Assessment Criteria

The learner can:

1. identify what information needs to be captured to meet company needs
2. describe how information must be captured, processed and stored to meet organisation and legal requirements.

Unit 204

Help customers to choose and book travel services

Outcome 7

Be able to complete travel services bookings

Assessment Criteria

The learner can:

1. process bookings for **travel** and any **additional services** that match the details agreed with the customer
2. process bookings in accordance with organisational procedures and to meet legal and regulatory requirements
3. complete all travel booking administration promptly and correctly following organisational procedures
4. store booking information and documentation securely following organisational procedures and legal requirements.

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 **three** from **travel services**
 - a) package holidays
 - b) accommodation only
 - c) ferry travel only
 - d) flight only
- and at least **three** from **additional services**
 - a) car hire
 - b) transport to and from departure point
 - c) car parking
 - d) insurance
 - e) tour operators extras
 - f) mobility requirements.

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

Unit 204

Help customers to choose and book travel services

Outcome 8

Know how to complete travel services bookings

Assessment Criteria

The learner can:

1. describe your organisation's procedures relating to the sale of travel services and insurance and the importance of following them
2. describe how to present costing to customers
3. explain relevant booking conditions and restrictions so that they are understood by customers
4. describe how to use and interpret reference sources to provide information and costings for different customer groups and pricing tariffs
5. describe how and when to question customers about passports and visas and any health requirements
6. describe how to determine customers' eligibility for different insurance products
7. describe how to interpret the travel arrangement information on travel documentation
8. describe organisational procedures for completing and processing manual and/or computer bookings, processing booking documentation and monitoring and logging bookings
9. describe organisational procedures for the distribution and storage of booking documentation
10. identify the types of travel documentation that can be issued and completed in the workplace
11. describe how to complete suppliers' manual or electronic booking documentation
12. explain how to use the phonetic alphabet
13. describe how to complete tickets, vouchers and associated documentation
14. describe how to ensure tickets, vouchers and associated documentation are accurate.

Unit 204

Help customers to choose and book travel services

Outcome 9

Understand the importance of accuracy and security in making travel bookings for customers

Assessment Criteria

The learner can:

1. describe the consequences of making booking errors
2. describe the consequences of incorrectly issuing and processing documents
3. describe how customer information is obtained, recorded and stored to maintain confidentiality and security.

Unit 204

Help customers to choose and book travel services

Outcome 10

Be able to process post-booking documentation

Assessment Criteria

The learner can:

1. ensure bookings have supplier confirmation that matches the services booked
2. issue the correct copies of booking documents to the relevant persons
3. update booking documentation promptly and accurately
4. refer all matters outside responsibilities to the relevant person.

What you must do

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

Unit 204 **Help customers to choose and book travel services**

Outcome 11 Be able to receive, prepare and issue travel documentation

Assessment Criteria

The learner can:

1. ensure that all documentation received matches the **travel services** booked
2. deal with any discrepancies in travel documentation promptly and appropriately before issuing them to customers
3. assemble all necessary documents and **tickets** accurately
4. issue travel documents to customers promptly and following the organisation's procedures
5. explain and reconfirm travel booking details with customers
6. confirm customers understanding and satisfaction with **travel services** booked
7. complete and update customer records fully and accurately before promptly passing them on to the relevant person(s).

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 **three** from **travel services**
 - a) package holidays
 - b) accommodation only
 - c) ferry travel only
 - d) flight only
- and at least **one** from **tickets**
 - a) pre-issued
 - b) tickets on departure (TOD)
 - c) e-tickets.

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

Unit 204

Help customers to choose and book travel services

Outcome 12

Know how to receive, prepare and issue travel documentation

Assessment Criteria

The learner can:

1. describe methods of making documents available to customers
2. describe your organisation's procedures for hand-over of travel documentation
3. identify the limits of your responsibility for handling documentation discrepancies and to whom you should report any problems.

This page is intentionally blank

Level: 2
Credit value: 5
NDAQ number: D/601/6560

Unit aim

This unit supports workforce development for those who arrange non-multi-sector air travel for travellers. The unit is designed for use primarily by agents in leisure and business travel 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 air travel
2. Understand the principles of dealing with customers
3. Be able to administer customers' air travel bookings
4. Be able to complete booking documentation
5. Know non multi-sector air travel information

Guided learning hours

It is recommended that **43** 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 travel services bookings (approved as National Occupational Standard) unit TT11.

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 205

Outcome 1

Arrange non multi-sector air travel

Understand the principles of air travel

Assessment Criteria

The learner can:

1. summarise the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers
2. outline a travel agent's main responsibilities under current industry codes of practice
3. summarise the legal obligations for advising customers on air travel services
4. explain the roles and responsibilities of major air travel organisations.

Unit 205

Outcome 2

Arrange non multi-sector air travel

Understand the principles of dealing with customers

Assessment Criteria

The learner can:

1. explain why it is important to show an interest in the customer by displaying a professional attitude
2. explain why it is important to demonstrate knowledge and experience to the customer
3. explain the importance of listening carefully to customers
4. explain why it is important to ensure that information provided to customers is accurate and up-to-date
5. explain the importance of accurately recording customer information
6. explain the need for confidentiality and the implications of the data protection legislation
7. identify relevant air travel insurance requirements
8. know how and when to use open and closed questioning
9. describe how to ask customers about passports and visas
10. identify suitable information to give customers regarding current, mandatory and recommended health precautions
11. describe the importance of adhering to organisational procedures relating to the sale of air travel services
12. ensure customers are aware of all relevant booking conditions and restrictions
13. compare the different entry requirements for EU and non-EU passport holders to major tourist destinations worldwide.

Unit 205

Outcome 3

Arrange non multi-sector air travel

Be able to administer customers' air travel bookings

Assessment Criteria

The learner can:

1. accurately summarise and confirm the customer's needs with them
2. advise customers of the total cost of their booking
3. explain any applicable booking restrictions to the customer
4. ensure that necessary records of customer enquiries are complete, accurate and correctly stored
5. seek customers' agreement to the **terms and conditions** prior to confirming the booking
6. confirm bookings for **air travel services** that accurately match the details agreed with the customer
7. process all booking administration promptly, correctly and following the organisational and supplier's procedures
8. store booking information and documentation securely following your organisational procedures and legal requirements.

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 **terms and conditions**
 - a) insurance requirements
 - b) itinerary
 - c) restrictions
- and at least **two** from **air travel services**
 - a) charter flight
 - b) no frills flight
 - c) consolidated flights
 - d) other scheduled services.

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

Unit 205

Outcome 4

Arrange non multi-sector air travel

Be able to complete booking documentation

Assessment Criteria

The learner can:

1. accurately explain applicable ticketing and payment arrangements following organisational and supplier's procedures
2. issue correct copies of booking documents to the relevant person(s), where required
3. complete all customer records fully and accurately and pass them to the relevant person(s) promptly.

What you must do

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

Unit 205

Outcome 5

Arrange non multi-sector air travel

Know non multi-sector air travel information

Assessment Criteria

The learner can:

1. identify the names and location of continents and countries
2. identify the location of major world tourist attractions and special events
3. describe how travel between different time zones can have an impact on the customer
4. describe how to use and interpret relevant air travel information and where to obtain it
5. describe the main types of air travel products and suppliers
6. describe travel organisations their roles including:
 - ATOL
 - CAA
 - IATA
7. recite the phonetic alphabet
8. describe what is meant by scheduled and charter flights
9. encode and decode airline and airport codes
10. describe airport departure and ticketing taxes and other service charges
11. describe how to calculate check-in times, terminal information and elapsed journey times
12. identify the free baggage allowances for the airlines
13. describe how to read maps to identify the location of major airports, destinations, major cities and country groups
14. describe how to identify and interpret booking conditions and specific restrictions relating to the air travel products and services
15. describe the consequences of misrepresentation.

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

Unit aim

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 Process travel and tourism services bookings (approved as National Occupational Standard) unit TT03.

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

Process travel and tourism services payments

Outcome 2

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
- and 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 **protect**
 - 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: T/601/5723

Unit aim

This unit supports workforce development for those staff in contact with customers and responsible for customer bookings, and any queries about bookings or changes that may need to be made. The unit is designed for use primarily by agents in both leisure and business travel 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 assisting customers
2. Be able to resolve customers' queries about their bookings
3. Be able to identify and make changes to bookings
4. Be able to advise customers on how to make travel-related claims and complaints
5. Know how to assist customers prior to and after travelling

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 customers prior to and after travelling (approved as National Occupational Standard) unit TT04.

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 207

Outcome 1

Assist customers prior to and after travelling

Understand the principles of assisting customers

Assessment Criteria

The learner can:

1. explain the importance of clear and accurate communication
2. explain the consequences of failing to complete all actions, promptly and correctly
3. explain why it is important to explain all of the available alternatives
4. explain the importance of handling changes, customer queries, claims and complaints in a way that maintains goodwill and the organisation's public image.

Unit 207
Outcome 2

Assist customers prior to and after travelling

Be able to resolve customers' queries about their bookings

Assessment Criteria

The learner can:

1. ensure that customers are informed about any implications arising from their **queries**
2. provide accurate and complete information to resolve customer **queries**
3. offer customers a range of suitable courses of action and reassurance where necessary
4. confirm customers' consent before taking any course of action to resolve **queries**
5. implement any agreed course of action to resolve **queries** promptly and accurately.

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 **queries**
 - a) non arrival of documents
 - b) incomplete and/or incorrect documentation
 - c) requests for additional information.

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

Unit 207

Outcome 3

Assist customers prior to and after travelling

Be able to identify and make changes to bookings

Assessment Criteria

The learner can:

1. inform customers promptly and accurately of the **implications** of any **changes** to their booking
2. offer customers a range of suitable alternative courses of action to resolve any problems
3. make agreed **changes** to bookings and update all records promptly and accurately
4. communicate with suppliers professionally at all times
5. issue customers with suitably amended documentation within the required time scale following 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 five** from **changes**
 - a) transport times
 - b) destination
 - c) accommodation
 - d) date of departure
 - e) date of return
 - f) length of trip
 - g) departure point
 - h) name
 - i) cancellation by supplier
 - j) cancellation by customer
- at least **two** from **implications**
 - a) additional payment required by the customer
 - b) amendment charge payable by the customer
 - c) compensatory payment made to the customer
 - d) refund payable to the customer
- and at least **three** from **procedures**
 - a) completion of documents
 - b) timescale for return of documents
 - c) items to be enclosed with claims
 - d) covering letters
 - e) where to submit claims
 - f) follow up
 - g) further courses of action.

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

Unit 207

Outcome 4

Assist customers prior to and after travelling

Be able to advise customers on how to make travel-related claims and complaints

Assessment Criteria

The learner can:

1. explain travel related claims and complaints procedures to customers
2. ensure that customers fully understand the processes they need to follow
3. answer customers' questions correctly
4. issue the correct documentation
5. check that customers are satisfied with the service.

What you must do

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

Unit 207

Outcome 5

Assist customers prior to and after travelling

Know how to assist customers prior to and after travelling

Assessment Criteria

The learner can:

1. describe extent of authority when handling queries and changes to bookings
2. identify whom to refer any matters to which are outside work responsibilities or experience
3. describe relevant travel service booking conditions
4. describe the courses of action that can be offered to resolve customers' queries and changes
5. describe how to question customers to find out what alternatives will meet their needs
6. describe legal obligations when advising customers, including general requirements of package holiday legislation
7. describe a travel agent's main responsibilities under current industry legislation and codes of practice for handling booking changes, queries and advising on claims and complaints procedures
8. explain additional payments, refunds, amendment charges, cancellation charges and compensatory payments to customers
9. explain any additional changes, the reasons for them and possible courses of action
10. describe how to seek and obtain customer agreement to a particular course of action
11. describe how to action changes to bookings initiated by the organisation and customers
12. explain how to adapt communication methods to suit the different needs of customers
13. describe organisational procedures for:
 - making changes to customer bookings
 - handling booking and other queries
 - completing customers' records
14. describe how to access original booking details, identify and record the changes required
15. identify what documents need to be completed, how to complete them and what happens to them
16. describe organisational procedures and documentation for claims and complaints for suppliers
17. describe how to communicate effectively with customers and suppliers.

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

Unit aim

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 Process travel services bookings (approved as National Occupational Standard) unit TT05.

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

Outcome 1

Set up and maintain promotional displays

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 a 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
- and **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

Set up and maintain promotional displays

Outcome 4

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.

This page is intentionally blank

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

Unit aim

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 Process travel services bookings (approved as National Occupational Standard) unit TT13.

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
- and **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.

This page is intentionally blank

Unit 210

Identify and provide tourism-related information and advice

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

Unit aim

This unit supports workforce development for those who provide tourism-related information and advice for visitors e.g. 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) guide books
 - 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

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
- and 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: 5
NDAQ number: A/601/6548

Unit aim

This unit supports workforce development for those who book travel services for customer eg package holidays, flights, accommodation, and additional services such as parking, transfers, excursions. The unit is designed for use primarily by leisure and business agents, tour operator staff who handle direct bookings 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 to process travel services bookings
2. Be able to complete booking administration
3. Understand the booking administration process
4. Be able to process and issue documentation and additional services
5. Know how to process and issue documentation and additional services

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

This unit of assessment relates directly to Process travel services bookings (approved as National Occupational Standard) unit TT02.

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 214

Outcome 1

Process travel services bookings

Understand the principles to process travel services bookings

Assessment Criteria

The learner can:

1. describe the principles of the licensing and controlling authorities rules
2. identify current industry codes of practice and legislation regarding travel ticket-issuing
3. explain the importance of accurate and secure record keeping
4. explain how legislation affects the way personal information is recorded and stored.

Unit 214

Outcome 2

Process travel services bookings

Be able to complete booking administration

Assessment Criteria

The learner can:

1. ensure customers' details and **booking** arrangements are accurate
2. use appropriate booking systems correctly, safely and securely
3. ensure customers' information is recorded accurately and confidentiality is maintained.

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 from:

- at least **four** from **booking**
 - a) package holidays
 - b) flights
 - c) accommodation
 - d) journey
 - e) travel
 - f) coach
 - g) rail
 - h) cruise.

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

Unit 214

Process travel services bookings

Outcome 3

Understand the booking administration process

Assessment Criteria

The learner can:

1. describe organisational and suppliers' procedures for completing manual or computer bookings
2. describe how to process booking documentation, monitor and log bookings
3. explain how to use current travel services booking systems
4. identify the types of customer information that must be recorded
5. describe the importance of confidentiality.

Unit 214

Process travel services bookings

Outcome 4

Be able to process and issue documentation and additional services

Assessment Criteria

The learner can:

1. process **documentation** promptly after the booking is completed following organisational and suppliers' procedures
2. provide customers and suppliers with confirmation of the services booked
3. issue correct copies of travel and other **documentation** to relevant parties within the timescale and according to organisational procedures
4. update travel and **additional services** documentation promptly and accurately where necessary
5. deal with any discrepancies promptly
6. handle and store booking information and **documentation** securely following organisational procedures and legal requirements.

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 **documentation**:
 - a) pre-issued
 - b) on departure
 - c) e-tickets
 - d) ticketless
- and at least **five** from **additional services**:
 - a) car hire
 - b) VIP lounges
 - c) car parking
 - d) transport to and from departure point
 - e) accommodation
 - f) insurance
 - g) pre-bookable excursions and tickets
 - h) tour operators' extras
 - i) ski packs
 - j) upgrades
 - k) other transport.

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

Unit 214

Outcome 5

Process travel services bookings

Know how to process and issue documentation and additional services

Assessment Criteria

The learner can:

1. explain how to process travel documentation
2. identify the types of travel documentation that can be issued and completed
3. describe the booking terms and conditions
4. explain abbreviations and terms used on travel documentation
5. explain the consequences of booking errors and incorrect issue or process of documents
6. describe the importance of accuracy in documentation
7. identify methods of making documents available to customers.

Unit 215

Assist with travel and tourism problems and emergencies

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

Unit aim

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 least **two** from **problem**
 - 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 reassured
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.

This page is intentionally blank

Level: 2
Credit value: 5
NDAQ number: D/601/5778

Unit aim

This unit supports workforce development for those who plan and conduct welcoming events for visitors to resorts. The unit is designed for use primarily by tour operations 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 **six** outcomes to this unit. The candidate will:

1. Understand the principles and purposes of welcoming events
2. Be able to plan welcoming events
3. Know how to plan welcoming events
4. Be able to conduct welcoming events
5. Know how to conduct welcoming events
6. Know the available resources in the surrounding area

Guided learning hours

It is recommended that **34** 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 Plan and conduct welcoming events (approved as National Occupational Standard) unit TT28.

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 216

Plan and conduct welcoming events

Outcome 1

Understand the principles and purposes of welcoming events

Assessment Criteria

The learner can:

1. explain the importance of repeat business and the contribution of welcoming events in supporting business
2. explain why it is important to show an interest in customers and use personal knowledge, colleagues' experience and team work to display a professional attitude and create a positive impression
3. explain the importance of establishing good working relationships with local supplier contacts
4. explain how commissions payable on excursion and entertainment sales contribute as a main tour operator income stream
5. explain the importance of making an evaluation of your own performance and using this to inform changes to future events.

Unit 216

Outcome 2

Plan and conduct welcoming events

Be able to plan welcoming events

Assessment Criteria

The learner can:

1. identify accessible venues which meet customers' expectations
2. book accessible venues which meet customers' expectations using approved procedures
3. rectify any health and safety hazards and unacceptable risks prior to the event
4. identify aims, **objectives** and any relevant targets for welcoming events
5. plan the event to suit the intended audience
6. make sufficient and relevant information materials available for the planned event
7. ensure that publicity for the event attracts the potential audience and meets the organisation's requirements
8. agree the layout and set up of the venue
9. arrange necessary equipment in good time for the event.

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:

- at least **one** from **objectives**
 - a) attendance numbers
 - b) level of take up of products and services
 - c) perceived level of customer satisfaction with the event and information supplied.

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

Unit 216

Plan and conduct welcoming events

Outcome 3

Know how to plan welcoming events

Assessment Criteria

The learner can:

1. explain organisational policies and procedures relating to the conduct of welcoming events and the sale of additional products and services
2. explain the importance of following organisational policies and procedures
3. describe where to access information on local venues suitable for welcoming events
4. identify criteria to be used for assessing the suitability of venues, including health and safety aspects
5. explain how to tailor the content of presentations to meet the likely interests and requirements of audiences
6. describe how to compile and structure welcoming event presentations in order to make them lively, informative and entertaining
7. describe ways to publicise an event in order to gain maximum impact and response
8. identify suitable layouts and set up arrangements for welcoming events
9. describe where to access information and materials on local places of interest, entertainment, facilities, cultural aspects and local environmental issues and guidelines
10. identify minimum stock levels for customer information materials
11. describe how to use and interpret brochures and timetables to provide information
12. explain the consequences of misrepresentation (eg in the context of local information amendments and/or updates) during presentations and discussions with customers.

Unit 216

Plan and conduct welcoming events

Outcome 4

Be able to conduct welcoming events

Assessment Criteria

The learner can:

1. ensure that the layout and set up of the venue is as requested
2. ensure that equipment is in working order prior to the arrival of customers
3. acknowledge customers in a polite and friendly way on arrival
4. ensure that customers are comfortably seated and have a clear view
5. ensure that all necessary information materials are available prior to the start of the presentation
6. make any late comers welcome and comfortable with minimum disruption to the meeting
7. present well structured and sequenced information using language and style suited to the customers
8. ensure customers are aware of where and how to access information updates throughout their stay
9. ensure customers are aware of any relevant environmental information and instructions
10. take opportunities for promotion/sales of other products and services when appropriate and where required
11. address customers' questions promptly and clearly during the event whilst taking into account the information needs of others
12. create opportunities for customers with personal queries to speak in confidence at the end of the event
13. create opportunities for customers with further information needs to ask questions after the close of the event
14. close the event following organisational procedures
15. retain any necessary **documentation** for processing
16. leave the venue clean and tidy after the last customer has left
17. follow up known non-attendees, ensuring they have all necessary information and are offered additional products and services that match their interests
18. evaluate the success of the event against agreed objectives and recommend adjustments for future events.

What you must do

The assessor must assess assessment criteria 1-18 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 **documentation**
 - a) booking forms
 - b) attendance lists.

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

Unit 216

Outcome 5

Plan and conduct welcoming events

Know how to conduct welcoming events

Assessment Criteria

The learner can:

1. describe how to check visual aid equipment is functioning
2. describe how to meet and greet customers
3. explain how to give a verbal presentation using techniques to engage the audience
4. describe how to promote the booking of excursion and entertainment offers in ways that maximise uptake
5. describe how to handle questions from the audience and when and to whom to redirect any queries
6. explain the importance of keeping customers informed throughout their stay and methods for this
7. describe the obligations for advising customers of booking conditions and any insurance requirements
8. identify the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers.

Unit 216

Plan and conduct welcoming events

Outcome 6

Know the available resources in the surrounding area

Assessment Criteria

The learner can:

1. explain how to read and interpret maps to identify major seaports, tourist destinations, capital cities, major cities and any island groups applicable to your local region
2. identify the names and location of key geographical features in the local region
3. identify the location of the most visited destinations in the local region
4. describe places of interest, entertainment and eating facilities available in the local area and their suitability for different customer needs
5. identify the location of major tourist attractions and special events in your local region
6. describe the types of transport available for rent in the area
7. describe car rental basic terms and abbreviations
8. compare the types of transport and tickets available in your local area
9. identify cultural and environmental issues and instructions applicable to the local area.

This page is intentionally blank

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

Unit aim

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

This unit of assessment relates directly to Process travel services bookings (approved as National Occupational Standard) unit TT29.

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 hazards and risks
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
- and 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.

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

Unit aim

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: 4
NDAQ number: Y/601/6556

Unit aim

This unit supports workforce development for those who assist with transfers for visitors eg between transport hubs, between airports and accommodation. The unit is designed for use primarily by tour operators 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 that affect transfers
2. Be able to welcome and assist customers on arrival
3. Be able to escort and brief customers during transfers
4. Be able to assist customers at the departure point
5. Know how to assist customers during transfers

Guided learning hours

It is recommended that **29** 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 travel services bookings (approved as National Occupational Standard) unit TT31.

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 219

Assist with transfers

Outcome 1

Understand the principles that affect transfers

Assessment Criteria

The learner can:

1. explain the importance of creating a positive impression for your customers
2. describe the effect travelling can have on a customer's ability to pay attention and the implications of this when giving instructions and information
3. explain the importance of checking off customers on arrival as quickly as possible
4. explain how and why commentaries need to be adapted for the time of day, length of journey and time until there is an opportunity to give more in-depth information
5. explain the importance of ensuring your customers are settled before leaving them
6. explain the importance of leaving transport clean and tidy after use
7. explain the significance of the farewell process in creating a lasting positive impression of you and your organisation.

Unit 219

Outcome 2

Assist with transfers

Be able to welcome and assist customers on arrival

Assessment Criteria

The learner can:

1. greet **arriving customers** in a friendly, approachable and polite manner
2. balance customers' individual needs and the needs of the group
3. meet customers needs in line with organisational procedures
4. check customers off promptly and direct them to their onward transport clearly
5. enhance customer safety by giving warnings of any hazards en route to onward transport and destinations
6. promptly assist and reassure any customers who have baggage problems.

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 **arriving customers**
 - a) anxious
 - b) aggressive
 - c) demanding
 - d) disruptive
 - e) harassed
 - f) with special needs.

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

Unit 219

Assist with transfers

Outcome 3

Be able to escort and brief customers during transfers

Assessment Criteria

The learner can:

1. check customers off promptly prior to transport departure
2. locate any missing passengers promptly and reassure the rest of the group
3. give all **essential** safety and comfort information to customers prior to departure
4. give **essential** information or commentary to help customer familiarisation with surroundings prior to arrival at accommodation and/or departure point
5. announce arrival at accommodation or transport link clearly and in good time
6. ensure that customers leave the transfer vehicle at the correct place with all luggage and possessions
7. ensure that any lost property is promptly returned to customers following the organisation's procedures
8. complete any records clearly and accurately
9. forward completed customer records to the relevant person(s).

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:

- **all** from **essential/critical information**
 - a) health and safety
 - b) accommodation
 - c) arrival point facilities
 - d) journey times
 - e) local times and temperatures
 - f) location.

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

Unit 219

Outcome 4

Assist with transfers

Be able to assist customers at the departure point

Assessment Criteria

The learner can:

1. give customers accurate departure point information and advice
2. ensure that customers are in the correct check-in queue for their journey
3. ensure that customers have the correct documentation to hand prior to arriving at the check-in desk
4. resolve any check-in problems and requests promptly and in a way that balances the needs of the customer and the organisation.

What you must do

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

Unit 219

Assist with transfers

Outcome 5

Know how to assist customers during transfers

Assessment Criteria

The learner can:

1. describe organisational requirements and procedures for conducting transfers and completing records
2. describe how to respond to and handle different types of customers
3. describe how to direct and control customers in ways that maintain their goodwill
4. describe where and how to clearly and recognisably position self to customers
5. identify the critical information needed to pass on to customers for the transfers that are being conducted
6. describe how and where to confirm arrival and departure times
7. describe how and where to find check-in information
8. describe how to access up-to-date transfer lists and explain the importance of possessing these
9. describe the internal and external layout of and facilities available at the arrival/departure point(s)
10. identify safe passenger walking routes to and from transport parking areas
11. describe the route(s) to the accommodation and airports
12. identify accommodation names and locate dropping off points
13. explain the importance of ensuring the customers are on the right vehicle
14. describe how to use a microphone
15. explain the importance of giving customers vehicle safety and comfort information immediately prior to departure
16. identify any current health and safety hazards and risks in the immediate area that are likely to affect customers
17. describe arrival/departure points' procedures and requirements for reporting and following up baggage-related problems
18. describe organisational arrangements for dealing with lost property
19. identify travel document requirements and describe how to check that customers have the correct documents to hand
20. describe commonly occurring checking-in problems and how to resolve them.

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:

1. Be able to spot customer service problems
2. Be able to pick the best solution to resolve customer service problems
3. Be able to 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

Be able to spot customer service problems

Assessment Criteria

The learner can:

1. listen carefully to customers about any problems 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

Be able to 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

Outcome 3

Resolve customer service problems

Be able to 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.

This page is intentionally blank

Level: 2
Credit value: 4
NDAQ number: H/601/5782

Unit aim

This unit supports workforce development for those who check and prepare accommodation for visitors eg tents, caravans, chalets. The unit is designed for use primarily by tour operations 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 **four** outcomes to this unit. The candidate will:

1. Understand the principles of preparing and maintaining holiday accommodation
2. Be able to prepare holiday accommodation
3. Be able to maintain accommodation and equipment to specification
4. Know how to prepare and maintain holiday accommodation

Guided learning hours

It is recommended that **30** 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 Prepare and maintain holiday accommodation (approved as National Occupational Standard) unit TT36.

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 222

Outcome 1

Prepare and maintain holiday accommodation

Understand the principles of preparing and maintaining holiday accommodation

Assessment Criteria

The learner can:

1. explain the importance of cleaning and preparation in creating a good first impression of the company
2. explain the importance of ensuring accommodation is ready in time for customers
3. explain why it is important to carry out safety checks on cleaning equipment you are required to use
4. explain why it is important to protect yourself during cleaning and maintenance activities
5. explain why it is important to comply with waste disposal requirements.

Unit 222

Outcome 2

Prepare and maintain holiday accommodation

Be able to prepare holiday accommodation

Assessment Criteria

The learner can:

1. use all necessary personal protective equipment (PPE) correctly
2. gather all necessary equipment and materials together, prior to starting work
3. use and operate all equipment safely, following manufacturer's instructions
4. use cleaning agents and materials that are suited to the task and use according to manufacturer's instructions and organisational guidelines
5. demonstrate the sequence of cleaning activities to minimise the risk of spreading infection
6. check that all surfaces are clean, dry and smear-free
7. check that all furniture and equipment allocated to the accommodation is clean and laid out according to the organisation's presentation requirements
8. dispose of **waste** safely, to any applicable environmental standards and to meet local requirements
9. check that all inventory items are in place and fit for purpose
10. ensure that accommodation is prepared and available by the time required
11. maintain any accommodation records promptly, clearly and accurately
12. forward any necessary accommodation records promptly to the correct person.

What you must do

The assessor must assess assessment criteria 1-12 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 **waste**
 - a) left by previous occupants
 - b) created by the cleaning process.

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

Unit 222

Outcome 3

Prepare and maintain holiday accommodation

Be able to maintain accommodation and equipment to specification

Assessment Criteria

The learner can:

1. replace any damaged, faulty or missing items promptly and report according to requirements
2. test all equipment safely prior to use and following the organisation's procedures
3. report any problems with equipment and accommodation that you cannot immediately resolve to the relevant person(s) promptly
4. report low stock of equipment and/or consumable items to the relevant person(s) promptly
5. keep the area immediately around the accommodation clean, tidy and free of litter.

What you must do

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

Unit 222

Outcome 4

Prepare and maintain holiday accommodation

Know how to prepare and maintain holiday accommodation

Assessment Criteria

The learner can:

1. describe how to avoid the risk of spreading infection when cleaning
2. explain how the type of surface and soiling can affect the choice of cleaning agent and equipment
3. identify the types of personal protective equipment (PPE) that should be worn when undertaking the cleaning and maintenance activities
4. identify the types of equipment and materials needed to prepare the accommodation, summarise the manufacturer's instructions for the equipment, materials and cleaning agents, identify and outline any local regulations that affect accommodation preparation and maintenance activities
5. identify the required stock levels for equipment and supplied consumable items
6. describe organisational procedures for
 - the preparation of holiday accommodation
 - general basic internal and external maintenance
 - equipment testing
 - reporting problems and the relevant person to contact
 - recording preparation and maintenance
 - reporting stock shortages
7. locate the inventory for the accommodation
8. summarise the specifications for the standard of finish required, layout and presentation of furniture and equipment
9. identify allocated time scales for the preparation of holiday accommodation.

This page is intentionally blank

Unit 223

Build and maintain relationships with customers not present

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

Unit aim

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 Process travel services bookings (approved as National Occupational Standard) unit TT52.

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
- and 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
- and 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

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 Process travel services bookings (approved as National Occupational Standard) unit TT08.

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 **record**
 - a) manually
 - b) electronically
- and **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 225

Arrange travel itineraries

Level: 2
Credit value: 7
NDAQ number: J/601/5760

Unit aim

This unit supports workforce development for those who create travel itineraries for customers. The unit is designed for use primarily by leisure and business travel agents, by tour operator staff where tailor-made travel bookings are made direct 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 factors involved in creating tailor-made travel itineraries to suit customers requirements
2. Be able to identify suitable travel-related components to meet customers' requirements
3. Know how to identify suitable travel-related components to meet customers' requirements
4. Be able to combine components to create itineraries that meet customers' specific wants, needs and preferences

Guided learning hours

It is recommended that **57** 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 Arrange travel itineraries (approved as National Occupational Standard) unit TT20.

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 225

Arrange travel itineraries

Outcome 1

Understand the factors involved in creating tailor-made travel itineraries to suit customers requirements

Assessment Criteria

The learner can:

1. explain the key features of a positive relationship with customers and the factors which affect it
2. explain why it is necessary to adjust means of communication with customers to match their needs and preferences
3. explain how customers' perceived needs may be different from their stated needs
4. describe a variety of customers and their real and perceived travel needs
5. explain how customers' wants, needs and preferences can influence itinerary choices
6. explain organisational requirements for collecting, recording and storing customers' information
7. explain organisational procedures for checking availability and price of components.

Unit 225

Arrange travel itineraries

Outcome 2

Be able to identify suitable travel-related components to meet customers' requirements

Assessment Criteria

The learner can:

1. establish and maintain **customer contact**
2. establish **customers' wants, needs and preferences**
3. collect and **record** relevant **customer information** quickly and accurately, in the required format
4. comply with operational, organisational and legal requirements when recording customer information
5. research suppliers to identify available **components** to meet specific customer requirements
6. describe to customers the features of suitable **components** and arrangements.

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 **one** from **customer contact**
 - a) face-to-face
 - b) telephone and electronic (email or chat)
- at least **one** from **customers' wants needs and preferences**
 - a) timing
 - b) travel
 - c) accommodation
 - d) additional services
- at least **two** from **customer information**
 - a) customers' contact details
 - b) product enquiries
 - c) relevant interests
- at least **one** from **recorded**
 - a) manually
 - b) electronically
- and at least **three** from **components**
 - a) travel
 - b) transfer
 - c) accommodation
 - d) from a single supplier
 - e) from multiple suppliers.

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

Unit 225

Outcome 3

Arrange travel itineraries

Know how to identify suitable travel-related components to meet customers' requirements

Assessment Criteria

The learner can:

1. describe a variety of means of communicating with customers to establish their needs and wants
2. describe current rules and regulations governing the sale of travel-related components
3. know how to access a variety of printed and electronic information sources
4. demonstrate sufficient knowledge of relevant travel geography to meet customers' needs and inspire confidence
5. describe the customer information that needs to be captured and recorded
6. describe how to identify suitable suppliers of travel and tourism products to suit different customer needs
7. identify sources of expert advice within the organisation
8. describe the characteristics of a good travel itinerary
9. describe the benefits and limitations of different itinerary formats
10. identify suitable suppliers of travel and tourism products to suit different customer needs
11. identify travel geography areas that meet customers' needs and inspire confidence.

Unit 225

Outcome 4

Arrange travel itineraries

Be able to combine components to create itineraries that meet customers' specific wants, needs and preferences

Assessment Criteria

The learner can:

1. present suitable itineraries and prices accurately and clearly for customer consideration
2. confirm the price, availability and detail of a suitable itinerary to close the sale
3. **process and store** customer and itinerary details securely and confidentially according to approved procedures.

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 **one** from **process and store**
 - a) manually
 - b) electronically.

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

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

Unit aim

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 Process travel services bookings (approved as National Occupational Standard) unit TT49.

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 **pitched**
 - 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.

Unit 227

Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector

Level: 2

Credit value: 2

NDAQ number: T/601/7214

Unit aim

Successful assessment of the unit proves that the candidate has achieved the National Occupational Standard to understand employment rights and responsibilities.

Learning outcomes

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

1. Know employer and employee rights, responsibilities and own organisational procedures
2. Know factors that affect own organisation and occupation

Guided learning hours

It is recommended that **16** guided learning 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 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 227

Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector

Outcome 1

Know employer and employee rights, responsibilities and own organisational procedures

Assessment Criteria

The learner can:

1. state employer and employee rights and responsibilities under employment law, including Disability Discrimination Act, Health & Safety and other relevant legislation
2. state importance of having employment rights and responsibilities
3. describe organisational procedures for health & safety, including documentation
4. describe organisational procedures for equality & diversity, including documentation
5. identify sources of information and advice on employment rights and responsibilities, including Access to Work and Additional Learning Support.

Unit 227

Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector

Outcome 2

Know factors that affect own organisation and occupation

Assessment Criteria

The learner can:

1. describe the role played by own occupation within organisation and industry
2. describe career pathways available to them
3. state types of representative body related to the industry, their main roles and responsibilities and their relevance to the industry
4. identify sources of information and advice on own industry, occupation, training and career
5. describe principles, policies and codes of practice used by own organisation and industry
6. describe issues of public concern that affect own organisation and industry.

This page is intentionally blank

Level: 3
Credit value: 7
NDAQ number: Y/601/5746

Unit aim

This unit supports workforce development for those who carry out foreign exchange transactions for customers eg within travel agencies. The unit is designed for use primarily by travel agents 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 **nine** outcomes to this unit. The candidate will:

1. Understand the principles of foreign exchange services
2. Understand currency exchange operations
3. Be able to maintain foreign exchange supplies to meet customer demands
4. Know how to maintain stocks of foreign exchange supplies
5. Understand the regulations and organisational procedures governing foreign exchange transactions
6. Be able to sell and buy exchange products to and from customers
7. Know how to conduct foreign exchange transactions
8. Be able to remit foreign exchange to suppliers
9. Know how to remit foreign currency to suppliers

Guided learning hours

It is recommended that **53** 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 Complete foreign exchange transactions (approved as National Occupational Standard) unit TT17.

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 326
Outcome 1

Complete foreign exchange transactions
Understand the principles of foreign exchange services

Assessment Criteria

The learner can:

1. explain the importance of following the correct procedures for ordering currency from suppliers
2. explain the importance of maintaining accurate records of foreign exchange transactions
3. explain the importance of displaying accurate and up-to-date exchange and commission rates
4. explain the importance of monitoring competitors and using competitive rates
5. explain the significance of the spread between buying and selling rates
6. explain the importance of accurately forecasting needs and maintaining stock
7. describe reliable sources of accurate currency exchange information
8. explain how rates vary according to local conditions
9. explain the consequences of maintaining incorrect levels of stock
10. explain the importance of storing and despatching foreign exchange securely.

Assessment Criteria

The learner can:

1. describe reliable sources of information on national currencies worldwide
2. identify the countries inside the Euro Zone
3. identify current currency exchange limits and restrictions
4. identify where to find exchange rates and the amount of commission charged
5. identify any appropriate alternatives to avoid currency limits and/or restrictions
6. explain the purpose and function of money transfer agents and when to use their services
7. explain different types of exchange rates and when and how to use them
8. describe how to advise customers of suitable foreign exchange transactions for particular destinations
9. explain the costs of currency transactions to customers
10. explain how and where to access information on exchange rates
11. describe how to calculate total transaction charges using exchange rates and commission rates
12. identify the currencies of different countries.

Unit 326

Outcome 3

Complete foreign exchange transactions

Be able to maintain foreign exchange supplies to meet customer demands

Assessment Criteria

The learner can:

1. place orders for **foreign exchange** supplies to meet **anticipated demand**
2. place **foreign exchange** orders within agreed organisational limits and procedures
3. maintain stocks of foreign currency to meet customers' immediate requirements
4. maintain the required stock balance in the till each day
5. comply with organisational till audit requirements
6. keep currencies safe and secure at all times following organisation security procedures
7. ensure currency stock records are accurate and up-to-date.

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 **foreign exchange**
 - a) foreign currencies
 - b) foreign currency traveller's cheques
 - c) sterling traveller's cheques
- and at least **two** from **anticipated demand**
 - a) immediate use
 - b) reserve stock
 - c) advance orders.

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

Unit 326

Outcome 4

Complete foreign exchange transactions

Know how to maintain stocks of foreign exchange supplies

Assessment Criteria

The learner can:

1. describe how seasonal variations affect demand for particular currencies
2. identify where to find information on orders
3. describe how to calculate anticipated foreign exchange needs
4. identify the optimum stock to be held locally to meet anticipated demands
5. describe the organisation's policy on stock management, safety and security
6. identify the organisation's operating limits on stock holding
7. identify who to inform regarding large transactions
8. explain the significance of passing on information about large foreign exchange transactions
9. describe organisational procedures for remitting and receiving stock
10. describe security procedures for handling and storing stock
11. describe how to maintain and complete stock and sales records
12. describe how to correctly document selling and buying transactions.

Unit 326

Outcome 5

Complete foreign exchange transactions

Understand the regulations and organisational procedures governing foreign exchange transactions

Assessment Criteria

The learner can:

1. explain current regulations that affect foreign exchange transactions
2. explain current regulations affecting foreign exchange services and money laundering
3. identify sources that control exchange rates or undertake large transactions
4. explain how to maintain currency stock levels and how they are adjusted to meet demands
5. identify documentation used to record exchange rate changes
6. describe regulations related to checking foreign exchange calculations
7. identify the frequency at which foreign and local exchange rates must be monitored
8. describe company policy on establishing local exchange rates
9. identify where to get authority to offer preferential rates
10. describe audit requirements for checking the till.

Unit 326

Outcome 6

Complete foreign exchange transactions

Be able to sell and buy exchange products to and from customers

Assessment Criteria

The learner can:

1. identify and verify major currencies and refer exchange queries to the appropriate person
2. display accurate and up-to-date **exchange** and commission **rate** information in the correct format
3. explain the advantages and disadvantages of different types of currency and equivalents
4. confirm transactions and associated costs with customers
5. explain any relevant restrictions associated with **foreign exchange** products
6. advise customers on the most suitable currency transactions to meet their individual needs
7. conduct transactions using the correct exchange rates and in compliance with current regulations
8. follow procedures to maintain the safety and security of currency, documents, customers and yourself
9. identify and deal with suspicious transactions in a tactful way
10. resolve any suspicious transactions following legal and organisational procedures
11. maintain accurate and up-to-date records of foreign exchange transactions and the till balances at the end of the day
12. complete daily balancing of foreign and local currency.

What you must do

The assessor must assess assessment criteria 1-12 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 **exchange rate**
 - a) buy
 - b) sell
- and at least **two** from **foreign exchange**
 - a) foreign currencies
 - b) foreign currency traveller's cheques
 - c) sterling traveller's cheques.

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

Unit 326

Outcome 7

Complete foreign exchange transactions

Know how to conduct foreign exchange transactions

Assessment Criteria

The learner can:

1. describe how to process payments for foreign exchange
2. describe ways to maintain the security of cash and equivalents when processing transactions.

Unit 326

Outcome 8

Complete foreign exchange transactions

Be able to remit foreign exchange to suppliers

Assessment Criteria

The learner can:

1. secure all returned currency packages
2. correctly address all currency packages being returned
3. return foreign currency to suppliers using the correct remit rate and within agreed time limits
4. follow the organisation's security procedures when remitting **foreign exchange**
5. complete despatch documentation accurately
6. maintain currency returns records accurately.

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 **foreign exchange**
 - a) foreign currencies
 - b) foreign currency traveller's cheques
 - c) sterling traveller's cheques.

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

Unit 326

Outcome 9

Complete foreign exchange transactions

Know how to remit foreign currency to suppliers

Assessment Criteria

The learner can:

1. identify where the organisation buys and remits foreign currency and travellers' cheques
2. describe the importance of following correct procedures in remitting currency and processing equivalents to suppliers
3. describe the importance of maintaining accurate records of foreign exchange orders and transactions with suppliers.

Level: 3
Credit value: 4
NDAQ number: D/601/6607

Unit aim

This unit supports workforce development for those who are in contact with travel and tourism customers. The unit is designed for use primarily by travel agents and tour operators 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 and uses of customer feedback in travel and tourism
2. Be able to obtain customer feedback efficiently
3. Be able to analyse and report on customer feedback data
4. Know how to obtain and analyse customer feedback

Guided learning hours

It is recommended that **35** 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 Obtain and analyse customer feedback (approved as National Occupational Standard) unit TT23.

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 327

Outcome 1

Obtain and analyse customer feedback

Understand the principles and uses of customer feedback in travel and tourism

Assessment Criteria

The learner can:

1. explain the principles of customer research including sampling to obtain feedback
2. explain the principles that affect the collection and analysis of customer feedback data
3. explain how constraints of time, cost and staffing affect the collection and analysis of customer feedback.

Unit 327

Outcome 2

Obtain and analyse customer feedback

Be able to obtain customer feedback efficiently

Assessment Criteria

The learner can:

1. obtain customer **feedback** that is suitable for subsequent analysis
2. maintain goodwill with the customer throughout the **collection process**
3. ensure the **collection process** does not damage the reputation of the company
4. **record** customer **feedback** accurately
5. maintain the confidentiality of customer information and **feedback**
6. store information according to organisational requirements.

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 **feedback**
 - a) quantitative
 - b) qualitative

- at least **one** from **collection process**
 - a) face-to-face
 - b) telephone

- at least **one** from **record**
 - a) manually
 - b) electronically.

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

Unit 327

Outcome 3

Obtain and analyse customer feedback

Be able to analyse and report on customer feedback data

Assessment Criteria

The learner can:

1. identify customer feedback data suitable for the purpose of the evaluation
2. extract and interpret information for analysis accurately
3. identify any gaps and deficiencies in the data for analysis and suggest how the gaps can be resolved
4. seek further assistance from others to enhance the accuracy of analysis when required
5. report the results of analysis to meet evaluation criteria promptly and clearly
6. report results of analysis that reflect the synthesis of customer feedback.

What you must do

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

Unit 327

Outcome 4

Obtain and analyse customer feedback

Know how to obtain and analyse customer feedback

Assessment Criteria

The learner can:

1. identify key data that will meet the needs of evaluation
2. explain methods that can be used to obtain feedback from customers
3. identify suitable opportunities to approach customers for feedback
4. distinguish between the types of questions used to ask customers to obtain effective feedback
5. describe the types of customer feedback that can be obtained
6. review the factors affecting the collection and analysis of customer feedback data
7. analyse the validity of customer feedback in meeting evaluation requirements
8. explain how to plan data collection for the most useful feedback opportunities.

This page is intentionally blank

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 the SSC.

Assessment

This unit should be assessed against the Pro Skills assessment.

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 in a travel and tourism environment
Unit 204	(T19) Help customers to choose and book travel services	Unit 204	Help customers to choose and book travel services
Unit 205	(T11) Arrange non-multi-sector air travel	Unit 205	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 207	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 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 214	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 216	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 219	Assist with transfers
Unit 220	(T47) Display stock to promote sales to customers – (Skillsmart Unit C2, Level 2)		
Unit 221	(T48) Resolve customer service problems – (ICS Unit 4, Level 2)	Unit 221	Resolve customer service problems
Unit 222	(T36) Prepare and maintain holiday accommodation	Unit 222	Prepare and maintain holiday accommodation
		Unit 223	Build and maintain relationships with customers not present
		Unit 224	Research travel and destination information
		Unit 225	Arrange travel itineraries
		Unit 226	Build and maintain face-to-face relationships with customers
		Unit 227	Employment rights and responsibilities in the hospitality, leisure, travel and tourism sector
		Unit 326	Complete foreign exchange transactions
		Unit 327	Obtain and analyse customer feedback

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.

City & Guilds
Skills for a brighter future



www.cityandguilds.com

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

Published by City & Guilds
1 Giltspur Street
London
EC1A 9DD
T +44 0844 543 0000
F +44 (0)20 7294 2400
www.cityandguilds.com

**City & Guilds is a registered charity
established to promote education
and training**

SP024927