

# Level 3 NVQ Diploma in Travel Services (4927-31/32/33)

## Qualification handbook for centres

500/9910/3

Leisure and Business

Tour operators – Head Office

Tour operators – Field Staff



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## **City & Guilds**

**1 Giltspur Street**

**London EC1A 9DD**

**T +44 0844 543 0000**

**F +44 (0)20 7294 2400**

**[www.cityandguilds.com](http://www.cityandguilds.com)**

**[centresupport@cityandguilds.com](mailto:centresupport@cityandguilds.com)**

# Level 3 NVQ Diploma in Travel Services (4927-31/32/33)

## Qualification handbook for centres

500/9965/6

Leisure and Business

Tour Operators (Head Office)

Tour Operators (Field Staff)

Qualification title	Number	QAN
Level 3 NVQ in Travel Services		
• Leisure and Business	4927-31	500/9965/6
• Tour Operators (Head Office)	4927-32	500/9965/6
• Tour Operators (Field Staff)	4927-33	500/9965/6

Version and date	Change detail	Section
1.2 Jan 2012	Unit 308 credit value	Unit
	Unit 309 GLH	Unit
	Unit 311 NDAQ number	Unit
	Pictorial images	Introduction
	Unit 331 level	Unit

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# 1 Introduction to the qualification

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

<b>Qualification title and level</b>	Level 3 NVQ Diploma in Travel Services
<b>City &amp; Guilds qualification number</b>	(4927-31/32/33)
<b>Qualification accreditation number</b>	500/9965/6
<b>Last registration date</b>	31/12/2013
<b>Last certification date</b>	31/12/2016

<b>Area</b>	<b>The Level 3 Diploma in Travel Services...</b>
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 part of the Travel Services Apprenticeship framework.
Why has the qualification been developed?	... replaces the City & Guilds Level 3 NVQ in Travel and Tourism Service (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 3 NVQ Diploma in Travel Services, learners must achieve 37 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.

<b>Unit accreditation number</b>	<b>City &amp; Guilds unit number</b>	<b>Unit title</b>	<b>Mandatory/ optional for full qualification</b>	<b>Credit value</b>	<b>Excluded combination of units (if any)</b>
A/601/6548	Unit 214	Process travel services bookings	Optional	5	N/A
F/601/6440	Unit 223	Build and maintain relationships with customers not present	Optional	6	N/A
T/601/7214	Unit 227	Employment Rights and Responsibilities in the hospitality, leisure, travel and tourism sector	Optional	2	N/A
A/601/6601	Unit 301	Organise your work and personal development	Mandatory	4	N/A
T/601/6578	Unit 304	Sell tailor-made travel services	Optional	10	N/A
K/601/6576	Unit 305	Sell multi-sector air travel	Optional	12	N/A
H/601/5149	Unit 306	Sell travel-related products and services	Optional	12	N/A
D/601/6574	Unit 307	Analyse, evaluate and present tourism data	Optional	4	N/A
T/601/6600	Unit 308	Contribute to supporting and developing colleagues	Optional	6	N/A
J/601/1515	Unit 309	Monitor and solve customer service problems	Optional	6	N/A

R/601/5776	Unit 310	Contribute to business travel account management	Optional	6	N/A
D/601/6610	Unit 311	Build and maintain customers' profiles	Optional	3	N/A
L/601/6599	Unit 312	Contribute to maintaining the quality of travel and tourism operations	Optional	5	N/A
T/601/5785	Unit 313	Organise and implement travel and tourism promotional activities	Optional	4	N/A
T/601/6533	Unit 314	Generate increased travel and tourism sales	Optional	5	N/A
F/601/9354	Unit 316	Monitor procedures to safely control work operations	Optional	5	N/A
M/601/6496	Unit 321	Deal with travel and tourism problems and emergencies	Optional	3	N/A
R/601/6510	Unit 322	Research and develop tour itineraries	Optional	8	N/A
K/601/6609	Unit 323	Plan and deliver on-site entertainment	Optional	5	N/A
T/601/6516	Unit 325	Manage the delivery of a tour	Optional	4	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
J/601/6536	Unit 329	Monitor business performance	Optional	4	N/A

L/601/5789	Unit 330	Manage accommodation and transfers	Optional	3	N/A
A/601/5867	Unit 331	Ensure responsibilities for actions to reduce risks to health and safety	Mandatory	4	N/A



**LEISURE AND BUSINESS**

8 mandatory credits from:

Unit 301  
Organise your work  
and personal  
development  
(4 credits)

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

**Minimum of 10 credits from:**

Unit 304  
Sell tailor-made  
travel services  
(10 credits)

Unit 305  
Sell multi-sector air  
travel  
(12 credits)

Unit 306  
Sell travel-related  
products and  
services  
(12 credits)

**19 credits from:**

Unit 214  
Process travel  
services bookings  
(5 credits)

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

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

Unit 304  
Sell tailor-made  
travel services  
(10 credits)

Unit 305  
Sell multi-sector air  
travel  
(12 credits)

Unit 306  
Sell travel-related  
products and  
services  
(12 credits)

Unit 308  
Contribute to  
supporting and  
developing  
colleagues  
(6 credits)

Unit 309  
Monitor and solve  
customer service  
problems  
(6 credits)

Unit 310  
Contribute to  
business travel  
account management  
(6 credits)

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

Unit 312  
Contribute to  
maintaining the  
quality of travel and  
tourism operations  
(5 credits)

Unit 313  
Organise and  
implement travel and  
tourism promotional  
activities  
(4 credits)

Unit 314  
Generate increased  
travel and tourism  
sales  
(5 credits)

Unit 326  
Complete foreign  
exchange  
transactions  
(7 credits)

Unit 327  
Obtain and analyse  
customer feedback  
(4 credits)

Unit 329  
Monitor business  
performance  
(4 credits)

**TOUR OPERATIONS (HEAD OFFICE)**

8 mandatory credits from:

Unit 301  
Organise your work  
and personal  
development  
(4 credits)

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

**Minimum of 30 credits from:**

Unit 214  
Process travel  
services bookings  
(5 credits)

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

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

Unit 304  
Sell tailor-made  
travel services  
(10 credits)

Unit 305  
Sell multi-sector air  
travel  
(12 credits)

Unit 306  
Sell travel-related  
products and  
services  
(12 credits)

Unit 307  
Analyse, evaluate  
and present tourism  
data  
(4 credits)

Unit 308  
Contribute to  
supporting and  
developing  
colleagues  
(6 credits)

Unit 309  
Monitor and solve  
customer service  
problems  
(6 credits)

Unit 312  
Contribute to  
maintaining the  
quality of travel and  
tourism operations  
(5 credits)

Unit 313  
Organise and  
implement travel and  
tourism promotional  
activities  
(4 credits)

Unit 314  
Generate increased  
travel and tourism  
sales  
(5 credits)

Unit 316  
Monitor procedures  
to safely control work  
operations  
(5 credits)

Unit 321  
Deal with travel and  
tourism problems and  
emergencies  
(3 credits)

Unit 322  
Research and  
develop tour  
itineraries  
(8 credits)

**TOUR OPERATIONS (FIELD STAFF)**

8 mandatory credits from:

Unit 301  
Organise your own work and personal development  
(4 credits)

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

**5 credits from:**

Unit 312  
Contribute to maintaining the quality of travel and tourism operations  
(5 credits)

**24 credits from:**

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

Unit 308  
Contribute to supporting and developing colleagues  
(6 credits)

Unit 309  
Monitor and solve customer service problems  
(6 credits)

Unit 313  
Organise and implement travel and tourism promotional activities  
(4 credits)

Unit 316  
Monitor procedures to safely control work operations  
(5 credits)

Unit 321  
Deal with travel and tourism problems and emergencies  
(3 credits)

Unit 323  
Plan and deliver on-site entertainment  
(5 credits)

Unit 325  
Manage the delivery of a tour  
(4 credits)

Unit 329  
Monitor business performance  
(4 credits)

Unit 330  
Manage accommodation and transfers  
(3 credits)

## 1.2 Opportunities for progression

On completion of this Level 3 NVQ Diploma in Travel Services candidates may progress into the following City & Guilds qualifications:

- City & Guilds Level 3 Apprenticeship in Travel Services
- City & Guilds Level 3 NVQ Certificate in Tourism Services

## 1.3 Qualification support materials

<b>Description</b>	<b>How to access</b>
Qualification handbook	Publications sales (SP034927)
Promotional materials	<a href="http://www.cityandguilds.com">www.cityandguilds.com</a>
Fast track approval form	<a href="http://www.cityandguilds.com">www.cityandguilds.com</a>

## 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 3 NVQ in Travel and Tourism Services (4847) will receive automatic approval for the new Level 3 NVQ Diploma in Travel Services (4927-31/32/33/34/35), 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 1<sup>st</sup> 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.

### **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](http://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
214	Process travel services bookings	A/601/6548	5
223	Build and maintain relationships with customers not present	F/601/6440	6
227	Employment Rights and Responsibilities in the hospitality, leisure, travel and tourism sector	T/601/7214	2
301	Organise your work and personal development	A/601/6601	4
304	Sell tailor-made travel services	T/601/6578	10
305	Sell multi-sector air travel	K/601/6576	12
306	Sell travel-related products and service	H/601/5149	12
307	Analyse, evaluate and present tourism data	D/601/6574	4
308	Contribute to supporting and developing colleagues	T/601/6600	6
309	Monitor and solve customer service problems	J/601/1515	6
310	Contribute to business travel account management	R/601/5776	6
311	Build and maintain customers' profiles	D/601/6610	3
312	Contribute to maintaining the quality of travel and tourism operations	L/601/6599	5
313	Organise and implement travel and tourism promotional activities	T/601/5785	4
314	Generate increased travel and tourism sales	T/601/6533	5
316	Monitor procedures to safely control work operations	F/601/9354	5

321	Deal with travel and tourism problems and emergencies	M/601/6496	3
322	Research and develop tour itineraries	R/601/6510	8
323	Plan and deliver on-site entertainment	K/601/6609	5
325	Manage the delivery of a tour	T/601/6516	4
326	Complete foreign exchange transactions	Y/601/5746	7
327	Obtain and analyse customer feedback	D/601/6607	4
329	Monitor business performance	J/601/6536	4
330	Manage accommodation and transfers	L/601/5789	3
331	Ensure responsibilities for actions to reduce risks to health and safety	A/601/5867	4

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## Unit 214

## Process travel services bookings

**Level:** 2  
**Credit value:** 5  
**NDAQ number:** A/601/6548

### Unit aim(s)

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 standards

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 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://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 for:

- at least **four** from **bookings**
  - 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**

### **Outcome 3**

## **Process travel services bookings**

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

### Outcome 4

## Process travel services bookings

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
  
- 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 223

# Build and maintain relationships with customers not present

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

### Unit aim(s)

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

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

### Learning outcomes

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

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

### Guided learning hours

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

### Details of the relationship between the unit and relevant national standards

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

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://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.

## 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 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://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.

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## Unit 301

# Organise your work and personal development

**Level:** 3  
**Credit value:** 4  
**NDAQ number:** A/601/6601

### Unit aim(s)

This unit supports workforce development for those who organise their own work and personal development.

The unit is designed for any staff 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 organising work and personal development
2. Be able to organise own workload
3. Be able to develop own personal performance
4. Know how to organise own work and personal development

### 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 Organise your own work and personal development (approved as National Occupational Standard) unit TT21.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## Unit 301

## Organise your work and personal development

### Outcome 1

Understand the principles of organising work and personal development

#### Assessment Criteria

The learner can:

1. explain the importance of continuously developing own skills and knowledge for self and the organisation
2. explain the importance of time management
3. explain the importance of planning and organising own work for self and for the organisation
4. explain the importance of having clear, realistic work objectives
5. describe how to clarify own objectives
6. explain the importance of planning for things that may go wrong
7. explain the importance of reviewing own work on a regular basis and adjusting own plans
8. explain the importance of updating own personal development plan on a regular basis and of involving other people in the process
9. explain the importance of practising new areas of skill and knowledge
10. describe how to find opportunities to practice new areas of skills and knowledge
11. explain the importance of prompt decision making to self and the organisation.

## Unit 301

## Organise your work and personal development

### Outcome 2

Be able to organise own workload

#### Assessment Criteria

The learner can:

1. meet **work objectives** by
  - making the best use of time and resources
  - prioritising and planning activities
2. agree planned **work objectives** with manager
3. work to ensure unhelpful interruptions and diversions are kept to a minimum
4. follow development plans as closely as possible
5. ensure that work is completed satisfactorily
6. achieve **work objectives** within the agreed deadlines.

#### 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 **work objectives**
  - a) quantity of work
  - b) type of work
  - c) quality of work.

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

## Unit 301

## Organise your work and personal development

### Outcome 3

Be able to develop own personal performance

#### Assessment Criteria

The learner can:

1. identify own personal career aspirations and the skills/knowledge needed to achieve them
2. assess own development needs against personal and the organisation's objectives at regular intervals
3. produce and agree suitable development plans with the relevant person where support from others is needed
4. recognise and take available opportunities to develop own skills and knowledge to meet known and anticipated work needs
5. seek and use feedback from others to help enhance own performance at work
6. review and update development plans at regular intervals.

## Unit 301

## Organise your work and personal development

### Outcome 4

Know how to organise own work and personal development

#### Assessment Criteria

The learner can:

1. compare different ways to develop self
2. describe how to set objectives which are specific, measurable and achievable
3. explain how to estimate the amount of time required to carry out planned activities
4. explain how to measure own work progress
5. describe how to plan and organise own work to meet work objectives, making best use of time and resources available
6. describe how to identify and minimise unhelpful interruptions to planned work
7. explain how to assess own current level of competence
8. describe how to plan and carry out self-reviews
9. describe how to encourage and receive feedback from colleagues and manager
10. explain how to make constructive use of such feedback
11. explain how to develop and manage a personal development plan
12. outline current and foreseeable travel and/or tourism industry changes
13. describe how travel and/or tourism industry changes may affect the skills and knowledge needed to remain employable.

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## Unit 304

## Sell tailor-made travel services

**Level:** 3  
**Credit value:** 10  
**NDAQ number:** T/601/6578

### Unit aim(s)

This unit supports workforce development for those who sell tailor-made travel services. The unit is designed for use primarily by travel agents in both leisure and business agencies 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 **eleven** outcomes to this unit. The candidate will:

1. Understand the principles of selling tailor-made travel services
2. Be able to investigate customers' travel needs
3. Be able to deliver tailor-made travel
4. Know the legislation and policy regarding the advice offered to customers
5. Know about a range of tailor-made travel products and services to meet customers' needs
6. Know about cruise products and services
7. Know about a range of destinations
8. Know how to create tailor-made travel itineraries
9. Understand the policy and legislation that may influence limits of tailor made travel options
10. Know how to propose tailor-made travel options to customers
11. Be able to settle the agreed transaction

### Guided learning hours

It is recommended that **75** 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 Sell tailor-made travel services (approved as National Occupational Standard) unit TT12.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 304**

### Outcome 1

## **Sell tailor-made travel services**

Understand the principles of selling tailor-made travel services

### **Assessment Criteria**

The learner can:

1. explain how to identify customers' requirements for tailor-made travel
2. describe the role of proposals in negotiating and finalising tailor-made travel transactions
3. explain the organisation's procedures relating to the sale of travel services and the importance of following them
4. explain how the organisation's objectives and own personal targets influence the selling of tailor-made travel services.

## Unit 304

### Outcome 2

## Sell tailor-made travel services

Be able to investigate customers' travel needs

### Assessment Criteria

The learner can:

1. confirm the customers' travel needs using appropriate **questioning techniques**
2. make customers aware of the range of possible **options** to best meet their expectations and enhance their travel experience
3. present customers with a range of travel **options** from different relevant suppliers
4. **record customer enquiries and needs** and ensure these are processed correctly.

### 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:

- **both** from **questioning techniques**
  - a) open questioning
  - b) closed questioning
- at least **two** from **options**
  - a) routings
  - b) modes of transport
  - c) types of accommodation
  - d) costings
  - e) places of interest
  - f) local culture and customs
  - g) special interests
- at least **one** from **records of customer enquiries and needs**
  - a) to improve efficiency of service for customer
  - b) for analysis to build customer profiles.

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

## **Unit 304**

### **Outcome 3**

## **Sell tailor-made travel services**

Be able to deliver tailor-made travel

### **Assessment Criteria**

The learner can:

1. create written and verbal proposals that meet customers' needs
2. present details and costs of travel itineraries, which are likely to meet or exceed customer expectations
3. present suitable alternatives where proposals do not specifically match customers' original requirements
4. ensure that the proposals meet legal and industry codes of practice requirements
5. ensure proposals meet customer expectations and the organisation's sales objectives
6. answer customers' queries and objections accurately.

### **What you must do**

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

## Unit 304

### Outcome 4

## Sell tailor-made travel services

Know the legislation and policy regarding the advice offered to customers

### Assessment Criteria

The learner can:

1. explain the importance of ATOL in relation to tailor-made holidays including:
  - the protection it offers
  - when an ATOL licence is required
  - which products are and are not covered by ATOL protection
2. explain the consequences of misrepresentation during discussions with customers
3. explain the importance of containing costs and the organisation's policy relating to this
4. describe import and export limits imposed by certain countries
5. explain the implications of using internal and/or external sourcing in relation to ATOL and package holiday legislation
6. describe the main industry trade associations, their main purposes and the benefits of membership to travel organisations and customers
7. summarise British Citizen Passport and British Subject Passport requirements for UK departures
8. identify sources of information for visa and passport entry requirements
9. describe the different entry requirements for EU and non-EU passport holders to major destinations worldwide
10. identify what information to give customers to enable them to find out current mandatory and recommended health precautions
11. describe the relationship between agents and principals.

## Unit 304

## Sell tailor-made travel services

### Outcome 5

Know about a range of tailor-made travel products and services to meet customers' needs

#### Assessment Criteria

The learner can:

1. describe the types of travel insurance available including amounts of cover, conditions, exclusions and excesses
2. provide examples of the questions to ask to determine customers' eligibility for insurance
3. compare sources of foreign exchange and how to obtain them
4. describe the main types of air travel products and suppliers
5. explain vehicle rental basic terms and abbreviations
6. compare the official grading schemes operating within countries worldwide
7. describe the different types of accommodation
8. describe the different methods of booking and paying for accommodation only, including the implications of guaranteed reservations
9. explain the terminology used when making accommodation only reservations, the main types of products and categories of principals, including specialist products and principals
10. identify the commissions payable by different suppliers
11. explain what service charges are and when they need to be applied
12. explain how to encode and decode 3-letter airport codes and 2-letter airline codes
13. interpret sources of European and worldwide travel information
14. explain how to use and interpret relevant brochures, timetables, fare schedules and price lists to provide information and costings
15. describe factors which can restrict the availability of some products, services and travel options.

## Unit 304

Outcome 6

## Sell tailor-made travel services

Know about cruise products and services

### Assessment Criteria

The learner can:

1. describe different cruise operators, routes, ship types, capacity and tonnage
2. locate major cruise ports
3. describe cruise terms and cabin types
4. explain the differences between cruise and other travel products
5. explain how to use and interpret cruise brochures to provide information on different types of cruise, European and worldwide, including
  - fly/cruise
  - special interest
  - round the world and cruise and stay
6. explain how to use and interpret cruise brochures to provide information on
  - deck plans
  - on-board facilities
  - excursions
  - entertainment
  - restaurant sittings
7. describe how to provide costings for all types of cruise.

## **Unit 304**

Outcome 7

## **Sell tailor-made travel services**

Know about a range of destinations

### **Assessment Criteria**

The learner can:

1. identify the names and locations of UK towns, cities, gateway airports and seaports and physical features, UK tourist attractions, regions and resorts and national parks
2. identify, in relation to outbound travel from the UK, the location of continents, countries, capitals, resorts, gateway airports and seaports, major towns, cities, tourist attractions, oceans and seas and main physical features
3. describe the climate, time zones, currencies and languages of outbound travel destinations
4. describe the food, clothing, shopping, entertainment, culture and special events available in a range of outbound travel destinations.

## Unit 304

### Outcome 8

## Sell tailor-made travel services

### Know how to create tailor-made travel itineraries

#### Assessment Criteria

The learner can:

1. explain how to put together an itinerary to achieve the best logical and economical sequence of events
2. explain how to arrange a travel itinerary including:
  - transfer
  - accommodation
  - sightseeing
  - stopover packages
3. describe how to apply knowledge of visa and passport requirements to individual circumstances
4. describe how to provide air travel costings and information on booking conditions
5. describe how to calculate service and credit card charges according to supplier's and your organisation's guidelines
6. describe how and when to use the phonetic alphabet
7. identify how and when to question customers about passports and visas
8. compare business insurance with leisure insurance to find the best deal for the customer
9. explain the implications of the disability discrimination legislation when giving advice and information to customers
10. explain how to calculate local times, distances and elapsed journey times
11. describe how to check the different booking conditions attached to travel products and services and any relevant restrictions
12. describe how to use and interpret reference sources to provide costings (in sterling) and information on different groups and models of rental vehicle including:
  - main conditions of rental including eligibility
  - insurance including collision damage waivers
  - personal accident insurance
  - additional insurance.

## **Unit 304**

## **Sell tailor-made travel services**

### Outcome 9

Understand the policy and legislation that may influence limits of tailor made travel options

#### **Assessment Criteria**

The learner can:

1. explain the organisation's main responsibilities under current industry codes of practice
2. describe the organisation's position on preferred operators
3. explain how to balance the organisation's needs with those of the customer
4. explain the need for confidentiality and the implications of data protection legislation
5. explain the importance of following Foreign Office advice
6. explain the legal implications of indemnities, advertising, contractual relationships and acting on behalf of customers and principles
7. explain the organisational, legal and industry codes of practice to which agreements with customers and records must conform.

## **Unit 304**

## **Sell tailor-made travel services**

### Outcome 10

Know how to propose tailor-made travel options to customers

#### **Assessment Criteria**

The learner can:

1. explain ways to avoid difficulties arising from the mismatch of proposals and customers' requirements and present alternatives
2. describe how to anticipate customer queries in response to proposals
3. describe how to present the proposals in a manner which is appropriate to the customer
4. explain relevant booking conditions and restrictions so that they are understood by customers
5. identify own limits of authority for modifying proposals
6. explain how to identify unresolved aspects of proposals
7. explain how to influence customers' decisions by using experience and knowledge to overcome objections
8. describe how to listen and respond sensitively and develop points and ideas
9. explain how to build rapport to encourage open dialogue and seek further information on customers' needs by:
  - matching language and style to suit the situation
  - structuring what is said to help customers follow a line of thought or number of points clearly
  - using verbal or visual illustrations to help customers understand any points.

## Unit 304

## Sell tailor-made travel services

Outcome 11

Be able to settle the agreed transaction

### Assessment Criteria

The learner can:

1. reach an agreement on the supply of travel services to which all parties agree
2. reassure customers about their choices following their decision to buy
3. summarise and accurately record the agreement reached
4. complete the transaction to meet 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:

- all from **requirements**
  - a) organisational
  - b) legal
  - c) industry codes of practice.

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

**Level:** 3  
**Credit value:** 12  
**NDAQ number:** K/601/6576

**Unit aim(s)**

This unit supports workforce development for those who sell multi-sector air travel and associated add-on services to travellers.

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

1. Understand the principles of selling multi-sector air travel
2. Be able to identify customers' air travel requirements and options
3. Know about world travel geography and air travel products, services and conditions
4. Be able to promote the features and benefits of different air travel arrangements
5. Know about multi-sector air travel-related products and services
6. Be able to handle customers' objections
7. Be able to close the sale
8. Know how to sell multi-sector air travel to customers

**Guided learning hours**

It is recommended that **93** hours should be allocated for this unit. This may be on a full-time or part-time basis.

**Support of the unit by a sector or other appropriate body**

This unit is endorsed by People 1<sup>st</sup>.

**Assessment**

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - **[www.people1st.co.uk](http://www.people1st.co.uk)**.

## **Unit 305**

### Outcome 1

## **Sell multi-sector air travel**

Understand the principles of selling multi-sector air travel

### **Assessment Criteria**

The learner can:

1. explain why it is important to ensure that information provided to customers is accurate and up-to-date
2. explain the need for confidentiality and the implications of data protection legislation
3. explain why it is important to use personal knowledge, colleagues' experience and team work to display a professional attitude and create a positive impression
4. explain travel agents' main responsibilities under current industry codes of practice
5. discuss the consequences of misrepresentation during discussions with customers.

## **Unit 305**

### Outcome 2

## **Sell multi-sector air travel**

Be able to identify customers' air travel requirements and options

### **Assessment Criteria**

The learner can:

1. summarise and confirm customers' travel requirements
2. offer options which best match the customers' expressed needs
3. explain any restrictions applicable to customers, using language they will understand
4. promote air travel arrangements to customers in an appropriate manner
5. take opportunities for selling additional services at a suitable time
6. accurately record the outcomes of discussions with customers following organisational procedures.

### **What you must do**

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

## Unit 305

### Outcome 3

## Sell multi-sector air travel

Know about world travel geography and air travel products, services and conditions

### Assessment Criteria

The learner can:

1. identify continents and major countries
2. identify major domestic and international tourist attractions and special events
3. identify currencies and conversion rates in major destinations worldwide
4. identify the official languages in major destinations worldwide
5. describe the climate in major tourist destinations worldwide
6. identify world time zones and describe the impact on travel arrangements
7. explain how to read and interpret worldwide maps to identify the location of major airports, tourist destinations, capital cities, major cities and country groups
8. describe British Citizen Passport and British Subject Passport requirements for UK departures
9. describe visa types and where to find information on visa and passport entry requirements
10. describe the different entry requirements for EU and non-EU passport holders to major destinations world wide
11. identify what information to give customers to enable them to find out current mandatory and recommended health precautions
12. describe how to apply knowledge of visa and passport requirements to individual circumstances
13. explain how to question customers about passports and visas.

## **Unit 305**

### Outcome 4

## **Sell multi-sector air travel**

Be able to promote the features and benefits of different air travel arrangements

### **Assessment Criteria**

The learner can:

1. describe the main features of air travel arrangements that match customer needs
2. generate further interest from customers
3. interpret buying signals correctly and act upon them
4. create opportunities for customers to fully discuss and explore features and benefits
5. promote travel services using methods that fully comply with organisational policies
6. describe air travel arrangements in ways that meet current industry codes of practice and legal requirements.

### **What you must do**

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

## Unit 305

## Sell multi-sector air travel

### Outcome 5

Know about multi-sector air travel-related products and services

#### Assessment Criteria

The learner can:

1. describe sources of information relating to air travel services and how to use and interpret them
2. describe the content of the current IATA knowledge specification at a minimum of Level 1, including fundamental knowledge of the BSP system
3. identify the main types of air products and suppliers
4. describe the types and functions of Global Distribution Systems (GDS)
5. explain car rental terms and abbreviations
6. describe the main conditions of car rental including eligibility
7. explain how to use and interpret reference sources to provide car hire information and costs on different groups and models
8. describe the car insurance provision offered by the car hire suppliers used by organisation
9. describe the features, benefits and costs of VIP lounges
10. identify main suppliers and restrictions to VIP lounge access
11. identify the location of parking sites in relation to major UK departure airports
12. describe the services offered by the main car parking organisations in the UK
13. identify where to access car parking charges and how to calculate costs
14. identify where to access information on the type and availability of transfers at major destination airports worldwide
15. describe how to purchase a transfer when not included in the price of flight tickets or accommodation booked
16. identify where to access and how to interpret information on onward transportation options worldwide
17. explain the different types of accommodation
18. describe official grading and categorisations for accommodation
19. explain the terminology used when making accommodation only reservations
20. describe the different methods of booking and paying for accommodation only, including the implications of guaranteed reservations
21. explain the types of travel insurance available including amounts of cover, conditions, exclusions and excesses
22. identify the differences and limitations of business insurance and leisure insurance, including sports cover
23. describe how to find the customer's eligibility for different insurance products
24. identify and explain relevant booking conditions and restrictions so that they are understood by your customers
25. describe service charges and when they need to be applied
26. explain how to calculate service and credit card charges.

## Unit 305

Outcome 6

## Sell multi-sector air travel

Be able to handle customers' objections

### Assessment Criteria

The learner can:

1. clarify customers' objections
2. resolve customers' objections where possible
3. match possible alternative solutions to customers' needs
4. take suitable **follow-on action** when objections cannot be resolved
5. build and retain customers' confidence.

### 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 **follow-on action**
  - a) ask a colleague for assistance
  - b) refer to a senior 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.

**Assessment Criteria**

The learner can:

1. re-assure customers when they confirm their intentions to buy
2. calculate the total costs of all services agreed and advise customers
3. complete sales following organisational procedures and in compliance with legal requirements
4. take opportunities to promote and sell **additional services**.

**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 **additional services**
  - a) car hire
  - b) VIP lounges
  - c) car parking
  - d) airport transfers
  - e) accommodation
  - f) insurance
  - g) other transport.

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

## **Unit 305**

### Outcome 8

## **Sell multi-sector air travel**

Know how to sell multi-sector air travel to customers

### **Assessment Criteria**

The learner can:

1. explain organisational procedures relating to the sale of air travel services and the importance of following them
2. describe your organisation's requirements for preferred operators
3. explain how to use selling techniques to make sales
4. explain your legal obligations when advising customers, including general requirements of air travel legislation
5. summarise legislation relating to multi-sector air travel.

## Unit 306

## Sell travel-related products and services

**Level:** 3  
**Credit value:** 12  
**NDAQ number:** H/601/5149

### Unit aim(s)

This unit supports workforce development for those who sell travel-related products and services eg travel agents selling travel services, holidays and components.

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

1. Understand the principles of selling travel related products and services
2. Be able to identify customers' travel needs
3. Be able to promote the features and benefits of travel products and services
4. Be able to close the sale
5. Understand how to identify customers' travel needs
6. Know how to promote the features and benefits of travel products and services
7. Know how to close the sale

### Guided learning hours

It is recommended that **89** hours should be allocated for this unit. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national standards

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

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 306**

### Outcome 1

## **Sell travel-related products and services**

Understand the principles of selling travel related products and services

### **Assessment Criteria**

The learner can:

1. describe the main principles of service and information provision to customers
2. explain the importance of up-to-date information systems
3. explain the need for confidentiality and the implications of data protection legislation
4. explain the main requirements of legislation when dealing with customers
5. summarise the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers
6. identify sources of information relating to products and services and how to interpret them
7. explain organisational policies and procedures relating to the sale of products and services and the importance of following them
8. summarise the main and current trade codes of practice when selling leisure or business travel.

## Unit 306

### Outcome 2

## Sell travel-related products and services

Be able to identify customers' travel needs

### Assessment Criteria

The learner can:

1. offer **travel products and services** that best match the customer's needs
2. record, process and store customer information to meet organisational procedures and legal requirements
3. confirm any **additional requirements** with the customer
4. present customers with clear responses to queries and solutions to issues
5. provide the customer with clear and accurate information on travel services, costs, legal requirements and additional services at the close of the sale.

### 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 **three** from **travel products and services**
  - a) package holidays
  - b) flights
  - c) accommodation
  - d) ferry travel
  - e) coach
  - f) rail
  - g) cruises
- at least **two** from **additional requirements**
  - a) dietary
  - b) health
  - c) mobility.

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

## Unit 306

### Outcome 3

## Sell travel-related products and services

Be able to promote the features and benefits of travel products and services

### Assessment Criteria

The learner can:

1. sell customers travel services that match their needs and are in line with organisational policies
2. explain to the customer features of **travel products and services** that match their needs clearly
3. confirm with the customer their understanding of **travel products and services** that match their needs
4. promote benefits clearly, accurately and in a way which generates further interest from the customer
5. give customers the opportunity to fully discuss and explore features and benefits
6. deal with customers' objections positively
7. describe clearly to the customer relevant terms, conditions and legal requirements relating to the sale.

### 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 products and services**
  - a) package holidays
  - b) flights
  - c) accommodation
  - d) ferry travel
  - e) coach
  - f) rail
  - g) cruises.

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

**Assessment Criteria**

The learner can:

1. seek customers' intention to buy at a suitable time in the discussion
2. identify and sell **extra travel products and services** that best match the customer's needs'
3. confirm with the customer the total cost of products and services
4. comply with organisational and legal requirements in any follow-up with customers
5. reassure customers following their buying decision
6. ensure that the sale meets the 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 **extra travel products and services**
  - a) car hire
  - b) VIP lounges
  - c) car parking
  - d) transport to and from departure point
  - e) accommodation
  - f) pre-bookable excursions and tickets
  - g) tour operators' extras
  - h) ski packs
  - i) upgrades
  - j) other transport
  - k) passports and visas.

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

## **Unit 306**

### Outcome 5

## **Sell travel-related products and services**

Understand how to identify customers' travel needs

### **Assessment Criteria**

The learner can:

1. describe how to use selling techniques
2. explain how to communicate with customers in different sales situations
3. outline the contractual responsibilities of the lead passenger
4. describe the consequences of misrepresentation during discussions with customers
5. illustrate the range of the organisation's products and services available
6. examine key features of the products and destinations which are popular with your organisation's customers
7. identify where information can be found on services
8. describe the range of technologies available to you and how these can be used
9. explain how the package of travel and additional services can be combined to match the needs of customers.

## **Unit 306**

### Outcome 6

## **Sell travel-related products and services**

Know how to promote the features and benefits of travel products and services

### **Assessment Criteria**

The learner can:

1. identify names, locations and conditions of popular destinations and travel geography and features of destinations
2. compare the different types of accommodation
3. compare the different methods of paying for travel services
4. describe how to use and interpret brochures and timetables to provide information and costing
5. describe how to identify and interpret booking conditions and specific restrictions relating to the products and services offered by the organisation
6. illustrate the range of the organisation's products and services available
7. describe key features of the products and destinations which are popular with customers
8. identify where information can be found on services.

## **Unit 306**

### Outcome 7

## **Sell travel-related products and services**

Know how to promote the features and benefits of travel products and services

### **Assessment Criteria**

The learner can:

1. summarise organisational and any legal requirements for advising customers
2. summarise booking conditions and insurance requirements.

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**Level:** 3  
**Credit value:** 4  
**NDAQ number:** D/601/6574

**Unit aim(s)**

This unit supports workforce development for those who are engaged in tourism data analysis for colleagues and managers eg tour operators, tourism organisations and tourist information service providers 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 processes for analysing and evaluating tourism data
2. Be able to analyse and evaluate tourism data
3. Know how to analyse and evaluate tourism data
4. Be able to present the results of tourism data analysis
5. Know how to present the results of tourism data analysis effectively

**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 the National Occupational Standards as stipulated by People 1<sup>st</sup>.

**Support of the unit by a sector or other appropriate body**

This unit is endorsed by People 1<sup>st</sup>.

**Assessment**

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 307**

### Outcome 1

## **Analyse, evaluate and present tourism data**

Understand processes for analysing and evaluating tourism data

### **Assessment Criteria**

The learner can:

1. explain the importance of factual reporting
2. explain the importance of maintaining confidentiality and security when handling tourism data
3. describe the operating implications of current data protection legislation.

**Unit 307**  
Outcome 2

**Analyse, evaluate and present tourism data**  
Be able to analyse and evaluate tourism data

**Assessment Criteria**

The learner can:

1. confirm the purpose of the data analysis with the relevant person
2. agree with the relevant person the required analysis and evaluation criteria
3. gather tourism data that is comprehensive, accurate and valid
4. extract and synthesise necessary information for the purpose of analysis
5. analyse and evaluate tourism data within agreed timescales and evaluation criterion.

**What you must do**

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

**Assessment Criteria**

The learner can:

1. describe the purpose for which an analysis and report is required
2. describe the evaluation and analysis criteria procedures to follow
3. know the timescale for work to be undertaken
4. identify relevant information and data from small and extended documents
5. identify relevant and reliable sources of information within the organisation
6. identify required specialist expertise and/or information
7. describe how to access all relevant sources of tourism data and information
8. describe how to compare tourism data and statistics
9. describe how to synthesise information obtained to achieve the aims of the analysis
10. describe how to formulate conclusions and recommendations based on evidence gathered
11. describe when and how to archive materials.

## Unit 307

### Outcome 4

## Analyse, evaluate and present tourism data

Be able to present the results of tourism data analysis

### Assessment Criteria

The learner can:

1. present statistical tourism data clearly which conforms to the organisation's house style
2. produce clear, concise and factual **reports** of the analysis supported by valid evidence
3. identify any obvious trends in the information gathered and subsequent analyses
4. justify conclusions and propose realistic recommendations based on the information gathered and subsequent analysis
5. adapt presentations of results to meet the needs and interests of the target audience
6. forward **reports** from data analysis promptly to the relevant person(s) and in the required format.

### 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 **reports**
  - a) written
  - b) oral.

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

## **Unit 307**

### Outcome 5

## **Analyse, evaluate and present tourism data**

Know how to present the results of tourism data analysis effectively

### **Assessment Criteria**

The learner can:

1. describe how to use appropriate language to suit the required formality and nature of a presentation
2. describe how to select an appropriate form of presentation of reports
3. describe how to organise written material coherently
4. describe ways to ensure presentations are accurate and error free
5. identify the person(s) to whom reports should be forwarded.

## Unit 308

# Contribute to supporting and developing colleagues

**Level:** 3  
**Credit value:** 6  
**NDAQ number:** T/601/6600

### Unit aim(s)

This unit supports workforce development for those who support and help develop colleagues in any kind of travel or tourism activities.

The unit is designed for use primarily by supervisors, subject experts 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 supporting and developing colleagues
2. Be able to arrange and carry out team briefings to support and develop colleagues
3. Know how to plan and provide team briefings
4. Be able to support and train colleagues to improve effectiveness and personal development
5. Know how to support colleagues to improve their effectiveness and personal development

### Guided learning hours

It is recommended that **44** hours should be allocated for this unit. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national standards

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

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## Unit 308

## Contribute to supporting and developing colleagues

### Outcome 1

Understand the principles of supporting and developing colleagues

#### Assessment Criteria

The learner can:

1. explain the importance of making sure colleagues understand what they have to do
2. explain the importance of making sure colleagues continue to be supported until they can achieve the standard required
3. explain why team briefings are important to the work of the organisation
4. explain the importance of discussing issues with colleagues absent from team briefings
5. identify ways in which issues can be discussed with those who cannot attend the briefings
6. explain the importance of acknowledging colleagues' achievements
7. explain the importance of complying with local and UK employment law when supporting and developing colleagues
8. explain the importance of staff retention to the organisation's operations
9. explain how organisational requirements affect support for colleagues.

## Unit 308

## Contribute to supporting and developing colleagues

### Outcome 2

Be able to arrange and carry out team briefings to support and develop colleagues

#### Assessment Criteria

The learner can:

1. obtain accurate information for **team briefings** from relevant sources
2. arrange **team briefings** conveniently for colleagues
3. explain the objectives of **team briefings** to colleagues clearly
4. prepare all necessary information for **team briefings**
5. present confidently and clearly, accurate information to colleagues at **team briefings**
6. conduct relevant **team briefings** to schedule
7. fulfil and maintain the objectives of **team briefings**
8. encourage colleagues to contribute to **team briefings**
9. offer feedback to colleagues when necessary
10. confirm that colleagues have understood the content of **team briefings**
11. deal with any misunderstandings before closing **team briefings**.

#### What you must do

The assessor must assess assessment criteria 1-11 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 **team briefings**
  - a) product updates
  - b) organisational updates
  - c) supplier promotions
  - d) competitors activities
  - e) sharing customer feedback.

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

## **Unit 308**

## **Contribute to supporting and developing colleagues**

### **Outcome 3**

Know how to plan and provide team briefings

#### **Assessment Criteria**

The learner can:

1. explain the importance of arranging team briefings conveniently for colleagues
2. explain the importance of ensuring colleagues are aware of the objectives of team briefings
3. explain the importance for colleagues to contribute to team briefings
4. explain how to encourage colleagues to contribute to team briefings
5. describe the importance of achieving the objectives of team briefings
6. explain why all instructions given and demonstration of tasks need to conform to legal and organisational requirements.

## Unit 308

## Contribute to supporting and developing colleagues

### Outcome 4

Be able to support and train colleagues to improve effectiveness and personal development

#### Assessment Criteria

The learner can:

1. make all colleagues aware of the skills and knowledge that can be shared within a team to help improve and/or assist with effectiveness
2. offer colleagues support in areas which can be confidently and competently demonstrated
3. identify and provide suitable support/assistance to colleagues as soon as is required
4. allow colleagues to practice demonstrated tasks under supervision until they are confident and competent
5. give colleagues clear and structured instructions and explanations using language at an appropriate level
6. give colleagues relevant and sufficient information to meet work needs
7. ensure colleagues understand all work expectations and any misunderstandings are corrected
8. provide instructions and task demonstrations that are in line with **organisational 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 **three** from **organisational and any legal requirements**
  - a) performance management
  - b) employment law
  - c) diversity policy
  - d) staff welfare requirements
  - e) retention policy.

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

## Unit 308

## Contribute to supporting and developing colleagues

### Outcome 5

Know how to support colleagues to improve their effectiveness and personal development

#### Assessment Criteria

The learner can:

1. identify areas in which support for colleagues is required
2. describe the implications of undermining colleagues' confidence
3. describe how discussions can be kept relevant to an agenda
4. describe the consequences of discussions becoming irrelevant to an agenda
5. describe how to recognise a colleague in need of support
6. explain how to instruct colleagues and demonstrate tasks clearly and correctly
7. describe how to provide constructive feedback
8. identify resources within in the organisation capable of providing support.

**Level:** 3

**Credit value:** 6

**NDAQ number:** J/601/1515

### **Unit aim**

The learner's job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

### **Learning outcomes**

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

1. Solve immediate customer service problems
2. Identify repeated customer service problems and options for solving them
3. Take action to avoid the repetition of customer service problems
4. Understand how to monitor and solve 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 C5 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 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - **[www.people1st.co.uk](http://www.people1st.co.uk)**.

## **Unit 309**

### Outcome 1

## **Monitor and solve customer service problems**

### Solve immediate customer service problems

#### **Assessment Criteria**

The learner can:

1. respond positively to customer service problems following organisational guidelines
2. solve customer service problems when they have sufficient authority
3. work with others to solve customer service problems
4. keep customers informed of the actions being taken
5. check with customers that they are comfortable with the actions being taken
6. solve problems with service systems and procedures that might affect customers before customers become aware of them
7. inform managers and colleagues of the steps taken to solve specific problems.

## **Unit 309**

### Outcome 2

## **Monitor and solve customer service problems**

Identify repeated customer service problems and options for solving them

### **Assessment Criteria**

The learner can:

1. identify repeated customer service problems
2. identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
3. work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation.

## **Unit 309**

### Outcome 3

## **Monitor and solve customer service problems**

Take action to avoid the repetition of customer service problems

### **Assessment Criteria**

The learner can:

1. obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
2. action their agreed solution
3. keep their customers informed in a positive and clear manner of steps being taken to solve any service problems
4. monitor the changes they have made and adjust them if appropriate.

## **Unit 309**

Outcome 4

## **Monitor and solve customer service problems**

Understand how to monitor and solve customer service problems

### **Assessment Criteria**

The learner can:

1. describe organisational procedures and systems for dealing with customer service problems
2. describe the organisational procedures and systems for identifying repeated customer service problems
3. explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
4. explain how to negotiate with and reassure customers while their problems are being solved.

## **Unit 309            Monitor and solve customer service problems**

### 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. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

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 evidence must include examples of problems which are:

- brought to your attention by customers
- are identified first by you and/or by a colleague.

The problems included in your evidence must include examples of a:

- difference between customer expectations and what is offered by your organisation
- problem resulting from a system or procedure failure
- problem resulting from a shortage of resources or human error.

You must show that you have considered the options for solving problems from the point of view of:

- your customer
- the potential benefits to your organisation
- the potential risks to your organisation.

You must provide evidence that you have made use of options that:

- follow organisational procedures or guidelines
- make agreed and authorised exceptions to usual practice.

## Unit 310

# Contribute to business travel account management

**Level:** 3  
**Credit value:** 6  
**NDAQ number:** R/601/5776

### Unit aim(s)

This unit supports workforce development for those who arrange travel for business clients. The unit is designed for use primarily by business 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 **six** outcomes to this unit. The candidate will:

1. Understand the principles of business travel account management
2. Be able to monitor clients' business travel usage
3. Be able to maintain travel-related information
4. Know how to maintain business travel-related information
5. Be able to assist customers to keep within travel policies
6. Know how to assist customers with travel arrangements whilst keeping within company travel policies

### Guided learning hours

It is recommended that **44** 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 Contribute to business travel account management (approved as National Occupational Standard) unit TT25.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## Unit 310

## Contribute to business travel account management

### Outcome 1

Understand the principles of business travel account management

#### Assessment Criteria

The learner can:

1. explain the purpose of business travel profiles and how they are used when arranging travel
2. explain how the information supplied will inform the Management Information System (MIS)
3. explain the implications of supplying inaccurate information to a Management Information System (MIS)
4. explain the need for confidentiality and the implications of the data protection legislation
5. describe a business travel agent's main responsibilities under current industry codes of practice
6. explain the importance of following organisational procedures relating to the sale of travel services
7. explain the importance of containing costs
8. explain the importance of following Foreign Office advice
9. explain the consequences of misrepresentation with regard to restricted price procedures
10. describe the relevant parts of the disability discrimination legislation and its implications when giving advice and information to travel customers
11. explain the legal requirements for accurate quotations and record keeping.

## **Unit 310**

## **Contribute to business travel account management**

### **Outcome 2**

Be able to monitor clients' business travel usage

#### **Assessment Criteria**

The learner can:

1. record and track travel arrangements and costs accurately against agreed current travel policies
2. ensure that information is valid and accurate when used in cost control analysis
3. supply accurate business travel usage information to the relevant person(s) in the correct format and at the time required.

#### **What you must do**

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

## Unit 310

## Contribute to business travel account management

### Outcome 3

Be able to maintain travel-related information

#### Assessment Criteria

The learner can:

1. gather reliable and current travel-related information from relevant **sources** on a regular and frequent basis using time- and cost-effective methods
2. supply accurate and current travel-related information and advice to assist the updating of travel policies promptly to the relevant person(s)
3. provide accurate business travel usage information to relevant person when required and in the correct format.

#### 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 **four** from **sources**
  - a) supplier updates
  - b) Global Distribution Systems (GDS)
  - c) trade press
  - d) internet
  - e) intranet
  - f) organisations or consortia's briefings.

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

## Unit 310

## Contribute to business travel account management

### Outcome 4

Know how to maintain business travel-related information

#### Assessment Criteria

The learner can:

1. identify suitable sources of business travel information
2. describe how to access suitable sources of business travel information
3. identify where to access information on ground transport arrangements in major cities worldwide
4. identify where to find information on the surface transportation available within different countries
5. describe car rental terminology and abbreviations
6. describe the main types of air and rail products and suppliers
7. identify where to find information on available airport services
8. describe 3-letter airport codes, 2-letter airline codes and how to encode and decode them
9. identify where to find information on airport facilities for key gateways and transfer points
10. describe British Citizen Passport and British Subject Passport requirements for UK departures
11. describe visa types and where to find information on visa and passport entry requirements
12. describe the different entry requirements for EU and non-EU passport holders to major destinations worldwide
13. describe what information to give customers to enable them to find out current mandatory and recommended health precautions
14. compare the official grading schemes operating within countries worldwide and the differences between them
15. identify where to find information on accommodation availability.

## Unit 310

## Contribute to business travel account management

### Outcome 5

Be able to assist customers to keep within travel policies

#### Assessment Criteria

The learner can:

1. establish accurate, complete and current traveller profiles with the travel booker
2. compare requested travel arrangements against the traveller's current profile and company travel policy before making any travel arrangements
3. identify any deviations from current policy
4. guide the traveller to gain required authorisation
5. make suitable and cost effective alternative recommendations to enable travellers to keep within budget and meet requirements
6. ensure that travellers are aware of any current incentives that would enable them to keep within budget and/or enjoy improved services
7. report any infringements of travel policy to the relevant person(s) following organisational procedures.

#### What you must do

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

## Unit 310

## Contribute to business travel account management

### Outcome 6

Know how to assist customers with travel arrangements whilst keeping within company travel policies

#### Assessment Criteria

The learner can:

1. identify where to access the approved profiles for travellers
2. identify when and where to obtain authorisation for travel arrangements outside policy and in short notice situations
3. describe organisational procedures relating to the sale of travel services and it's importance
4. describe organisational requirements on preferred operators
5. describe organisation policies relating to containing costs
6. outline organisational, legal and industry codes of practice to which agreements with customers and records must conform
7. describe procedure for reporting infringements of travel policy
8. identify where to access travel security information
9. describe the travel policies of your customers and how and where to access them
10. describe how to use the Global Distribution System (GDS)
11. describe how to use and interpret reference sources to provide costings and information on different groups and models of rental vehicle, main conditions of rental including eligibility
12. describe how to provide air and rail travel costings and information on booking conditions
13. describe how to calculate local times, distances and elapsed journey times
14. describe how to apply knowledge of visa and passport requirements to individual circumstances
15. describe how to question customers about passports and visas.

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

**Unit aim(s)**

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

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

**Learning outcomes**

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

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

**Guided learning hours**

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

**Details of the relationship between the unit and relevant national standards**

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

**Support of the unit by a sector or other appropriate body**

This unit is endorsed by People 1<sup>st</sup>.

**Assessment**

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 311**

### Outcome 1

## **Build and maintain customers' profiles**

Understand the value of accurate account tracking and management

### **Assessment Criteria**

The learner can:

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

## Unit 311

### Outcome 2

## Build and maintain customers' profiles

Be able to obtain personal travel details

### Assessment Criteria

The learner can:

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

### What you must do

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

### What you must cover

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

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

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

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

## **Unit 311**

### **Outcome 3**

## **Build and maintain customers' profiles**

Be able to compile and maintain personal travel profiles

### **Assessment Criteria**

The learner can:

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

### **What you must do**

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

## **Unit 311**

### Outcome 4

## **Build and maintain customers' profiles**

Know how to build and maintain personal travel profiles

### **Assessment Criteria**

The learner can:

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

## Unit 312

# Contribute to maintaining the quality of travel and tourism operations

**Level:** 3  
**Credit value:** 5  
**NDAQ number:** L/601/6599

### Unit aim(s)

This unit supports workforce development for those who quality assure day-to-day operations and systems including security procedures across the travel and tourism industries ie leisure and business travel agencies, tour operations, visitor services and guiding.

The unit is designed for use primarily by managers and supervisors 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 importance of maintaining standards
2. Be able to help maintain the quality and security of operations
3. Be able to help maintain the standard of supplied goods and services
4. Know how to help maintain the quality of travel and tourism operations

### 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 the National Occupational Standards as stipulated by People 1<sup>st</sup>.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 312**

## **Contribute to maintaining the quality of travel and tourism operations**

### Outcome 1

Understand the importance of maintaining standards

#### **Assessment Criteria**

The learner can:

1. explain the importance of monitoring operations and taking prompt remedial action
2. explain why it is important to identify the causes of problems and take effective action to resolve them and prevent their recurrence
3. explain the importance of keeping self and colleagues up-to-date on quality assurance and security procedures
4. explain the importance of maintaining and enhancing customer and supplier goodwill and the image of the organisation.

## Unit 312

## Contribute to maintaining the quality of travel and tourism operations

### Outcome 2

Be able to help maintain the quality and security of operations

#### Assessment Criteria

The learner can:

1. ensure that less experienced colleagues are aware of:
  - the standards of performance expected of them
  - the systems in place to measure standards of performance
2. monitor **operations** and **security procedures** against given measures at specified intervals
3. promptly rectify any operational deficiencies
4. implement agreed changes and improvements according to instructions
5. complete quality assurance records and reports accurately
6. forward completed quality assurance records and reports to the correct person.

#### 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 **operations**
  - a) for the benefit of customers
  - b) to meet the needs of the organisation
- at least **three** from **security procedures**
  - a) cash (and equivalents)
  - b) staff
  - c) customers
  - d) premises
  - e) equipment
  - f) information.

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

## **Unit 312**

## **Contribute to maintaining the quality of travel and tourism operations**

### **Outcome 3**

Be able to help maintain the standard of supplied goods and services

#### **Assessment Criteria**

The learner can:

1. identify variations from specification in the delivery of contracted products and services
2. report reasons for variations from specifications to the appropriate person
3. follow correct procedures to minimise the effects on customers of products and services being below specification
4. maintain the goodwill of external suppliers and the good image of the organisation.

#### **What you must do**

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

## Unit 312

## Contribute to maintaining the quality of travel and tourism operations

### Outcome 4

Know how to help maintain the quality of travel and tourism operations

#### Assessment Criteria

The learner can:

1. describe the types of supplier problems that can commonly affect customers
2. describe the types of measures available for quality assuring on-site travel and tourism operations, security and supplier performance
3. describe quality control and monitoring systems used in the organisation and how to apply them
4. summarise the contractual obligations of the suppliers in the area(s) for which you are responsible
5. describe the standards of personal performance, service and conduct for the organisation
6. describe how to deal with operational quality failures
7. identify the items in the area where you work that are classified as 'high value' and subject to special security arrangements
8. identify key holders responsibilities and how to contact them
9. describe role and responsibilities in ensuring the quality of operations, maintaining security and the delivery of services by suppliers
10. identify and summarise organisational policies and procedures covering all workplace operations, security and services provided to customers
11. outline organisational and local policies for sustainable tourism and how they should be implemented
12. summarise aspects of current data protection legislation relevant to the information that is stored
13. describe the type(s) of organisational quality control records and how and when to complete them
14. identify the person(s) to whom to report any quality related problems
15. describe how to deal with suppliers and others when things go wrong.

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## Unit 313

# Organise and implement travel and tourism promotional activities

**Level:** 3  
**Credit value:** 4  
**NDAQ number:** T/601/5785

### Unit aim(s)

This unit supports workforce development for those who promote travel and tourism for visitors eg local heritage sites, industrial sites, walking tours, bus tours.

The unit is designed for use primarily by travel agents, tour operators, providers of visitor services 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 organisation and implementation of promotional activities
2. Be able to plan promotional activities
3. Be able to implement promotional activities
4. Be able to evaluate and revise promotional activities
5. Know how to organise and implement travel and tourism promotional activities

### 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 Organise and implement travel and tourism promotional activities (approved as National Occupational Standard) unit TT42.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 313**

## **Organise and implement travel and tourism promotional activities**

### Outcome 1

Understand the organisation and implementation of promotional activities

#### **Assessment Criteria**

The learner can:

1. explain the roles of promotional activities in the wider context of marketing products and services
2. identify and describe factors affecting the success of promotional activities in travel and tourism
3. summarise legislation and regulation relevant to promotional activities being planned and undertaken.

## Unit 313

# Organise and implement travel and tourism promotional activities

## Outcome 2

Be able to plan promotional activities

### Assessment Criteria

The learner can:

1. agree the aims, objectives and success criteria of promotional activities with the relevant person(s)
2. encourage others to contribute ideas for promotional activities
3. secure **resources** for the promotional activities
4. plan activities to meet organisational needs, procedures and **legal requirements**
5. plan contingency arrangements to take account of predictable problems
6. present **plans** in a format to suit the needs of all others involved
7. make suitable arrangements for the evaluation of the promotional activities.

### 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 **resources**
  - a) time
  - b) funding
  - c) people
  - d) materials
  - e) location/space
- at least **three** from **legal requirements**
  - a) health
  - b) safety
  - c) security
  - d) confidentiality
- at least **two** from **plans**
  - a) aims
  - b) objectives
  - c) activities
  - d) resources
  - e) success criteria
  - f) costing
  - g) roles and responsibilities
  - h) methods of evaluation.

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

## Unit 313

# Organise and implement travel and tourism promotional activities

## Outcome 3

Be able to implement promotional activities

### Assessment Criteria

The learner can:

1. undertake promotional and evaluation activities according to the agreed plan
2. check that suitable **promotional resources** are available and meet the quality and quantity needs of the activities
3. resolve any problems to minimise disruption
4. notify any necessary changes to the plan to all those affected.

### 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:

- **both** from **promotional resources**
  - a) display materials
  - b) information materials.

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

## **Unit 313**

## **Organise and implement travel and tourism promotional activities**

### **Outcome 4**

Be able to evaluate and revise promotional activities

#### **Assessment Criteria**

The learner can:

1. evaluate promotional activities against the planned objectives and success criteria
2. report the results of the evaluation promptly, clearly and accurately to the relevant person(s)
3. use outcomes of the evaluation to inform the type, use and content of future promotional activities
4. make recommendations for future activities that are supported by evaluation information.

#### **What you must do**

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

## **Unit 313**

## **Organise and implement travel and tourism promotional activities**

### **Outcome 5**

Know how to organise and implement travel and tourism promotional activities

#### **Assessment Criteria**

The learner can:

1. describe the promotional needs and procedures of the organisation
2. describe the features of the travel and tourism products and services to be promoted
3. describe organisational procedures for sourcing and securing promotional resources
4. explain the outcomes of previous promotional activities run by the organisation.

## Unit 314

## Generate increased travel and tourism sales

**Level:** 3  
**Credit value:** 5  
**NDAQ number:** T/601/6533

### Unit aim(s)

This unit supports workforce development for those who undertake sales drives to increase sales in travel and tourism.

The unit is designed for use primarily by leisure and business 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 **five** outcomes to this unit. The candidate will:

1. Understand the principles of increasing travel and tourism sales
2. Be able to source contacts to increase potential sales
3. Be able to promote travel and tourism product and services
4. Be able to evaluate success in increasing sales
5. Know how to generate increased sales of travel and tourism products and services

### Guided learning hours

It is recommended that **46** 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 Generate increased travel and tourism sales (approved as National Occupational Standard) unit TT46.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 314**

### Outcome 1

## **Generate increased travel and tourism sales**

Understand the principles of increasing travel and tourism sales

### **Assessment Criteria**

The learner can:

1. describe the purpose and value of local direct sales drives in promoting sales and identifying customers' needs
2. explain the importance of carefully monitoring customers' reactions during sales conversations
3. explain the importance of recording customers' response to sales offerings
4. explain the influence that economic and social conditions can have on customers' reactions to travel and tourism sales drives
5. explain the importance of providing only accurate and relevant information to potential customers.

## Unit 314

### Outcome 2

## Generate increased travel and tourism sales

Be able to source contacts to increase potential sales

### Assessment Criteria

The learner can:

1. identify agreed sales-drive objectives and evaluation **methods** with the relevant person(s)
2. select potential **sales leads** according to agreed criteria
3. identify potential **products and services** of interest to customers.

### What you must do

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

### What you must cover

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

- at least **two** from **sales leads**
  - a) recent customer enquiries not converted to sales
  - b) recently returned travellers
  - c) repeat customers
  - d) colleague suggestions
- at least **one** from **products and services**
  - a) core products
  - b) additional products and services
- at least **one** from **methods**
  - a) telephone
  - b) post
  - c) email.

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

## Unit 314

### Outcome 3

## Generate increased travel and tourism sales

Be able to promote travel and tourism product and services

### Assessment Criteria

The learner can:

1. contact customers and sales leads effectively
2. promote products and services based on customers' previous buying history and potential needs
3. identify opportunities for up-selling and switch-selling
4. adapt sales techniques to suit customers' reactions
5. provide valid information to suit customers' requirements
6. accurately record **customer contact details**.

### 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 **details of customer contact**
  - a) customer information
  - b) further action
  - c) sales
  - d) referrals.

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

**Unit 314**  
Outcome 4

**Generate increased travel and tourism sales**  
Be able to evaluate success in increasing sales

**Assessment Criteria**

The learner can:

1. compare sales drive objectives with actual sales agreed
2. compare and explain discrepancies between sales achieved and agreed objectives
3. provide recommendations for future sales-drives based on accurate evaluation
4. provide recommendations for future sales-drives to the relevant person(s).

**What you must do**

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

## **Unit 314**

### **Outcome 5**

## **Generate increased travel and tourism sales**

Know how to generate increased sales of travel and tourism products and services

### **Assessment Criteria**

The learner can:

1. compare the benefits and limitations of different means of contacting customers
2. describe how to use a customer database to identify potential sales leads
3. describe how to use selling techniques to make sales
4. describe how to adapt a sales approach to suit different customers' reactions
5. outline the range of customers needs for travel and tourism products and services
6. identify current economic and social conditions that affect the purchasing of travel and tourism products and services
7. describe ways of evaluating the success of sales-drives
8. describe how information can be presented to customers to generate interest in travel and tourism products and services
9. describe how to up-sell and switch-sell
10. identify the range, features and prices of available travel and tourism products and services
11. describe current promotional deals and sales objectives
12. identify the main travel and tourism products and services offered by competitors
13. identify with whom you can refer customer contacts and share information.

## Unit 316

# Monitor procedures to safely control work operations

**Level:** 3

**Credit value:** 5

**NDAQ number:** F/601/9354

### Unit aim

This unit is about making sure that statutory and workplace instructions are being carried out. It describes the competences required to make sure that:

- a) health and safety procedures are being followed within work areas
- b) appropriate action is undertaken to control workplace hazards.

### Learning outcomes

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

1. Be able to check that health and safety instructions are followed
2. Be able to recommend changes to health and safety workplace instructions
3. Be able to make sure that hazards and risks are controlled safely and effectively
4. Know how to monitor procedures to safely control work operations

### Guided learning hours

It is recommended that **35** 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 is based on National Occupational Standards originally developed by ENTO and now managed by ProSkills.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by Pro Skills.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 316**

## **Monitor procedures to safely control work operations**

### **Outcome 1**

Be able to check that health and safety instructions are followed

#### **Assessment Criteria**

The learner can:

1. keep up-to-date with health and safety regulations and workplace instructions, making sure that information is from reliable sources
2. conduct monitoring of the workplace at agreed intervals and in accordance with workplace instructions
3. confirm that workers are health and safety competent as defined in their job role and that identified health and safety training needs have been met
4. communicate workplace instructions and receive feedback.

## **Unit 316**

## **Monitor procedures to safely control work operations**

### **Outcome 2**

Be able to recommend changes to health and safety workplace instructions

### **Assessment Criteria**

The learner can:

1. respond to any breaches of health and safety instructions in a way which meets workplace and legal requirements
2. make recommendations for any changes to health and safety workplace instructions to the responsible people.

## **Unit 316**

## **Monitor procedures to safely control work operations**

### **Outcome 3**

Be able to make sure that hazards and risks are controlled safely and effectively

#### **Assessment Criteria**

The learner can:

1. maintain accurate records of workplace irregularities
2. check other people are aware of the hazards/risks and know the action(s) to be taken to minimise them
3. confirm that appropriate precautions to control risks have been agreed with the people responsible for health and safety
4. review to make sure all recommended action has been taken
5. report any conflicts that still exist between workplace and legal requirements.

## **Unit 316**

## **Monitor procedures to safely control work operations**

### **Outcome 4**

Know how to monitor procedures to safely control work operations

#### **Assessment Criteria**

The learner can:

1. explain employers' and employees' legal responsibilities for health and safety in the workplace
2. explain the difference between 'hazard', 'risk' and 'control'
3. describe the types of information available from reports and records covering the workplace
4. explain the importance of evaluating information from reports and records covering the workplace.

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## Unit 321

# Deal with travel and tourism problems and emergencies

**Level:** 3  
**Credit value:** 3  
**NDAQ number:** M/601/6496

### Unit aim(s)

This unit supports workforce development for those who are responsible for helping customers eg resort representatives and managers on site and those in a relevant role at tour operator's head office.

The unit is designed for use primarily by tour operator 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 need for effective responses to problems and emergencies
2. Be able to respond to problems and emergency situations
3. Know how to respond to problems and emergencies
4. Be able to co-ordinate post-emergency situations
5. Know how to co-ordinate post-emergency situations

### Guided learning hours

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

### Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Deal with travel and tourism problems and emergencies (approved as National Occupational Standard) unit TT37.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 321**

# **Deal with travel and tourism problems and emergencies**

### Outcome 1

Understand the need for effective responses to problems and emergencies

#### **Assessment Criteria**

The learner can:

1. explain why prompt help and good communications with customers, colleagues and other affected parties is important
2. describe the extent to which taking the correct action helps maintain good customer relationships and its value to the organisation
3. explain the importance of giving on-going support to those closely affected by emergencies.

## Unit 321

## Deal with travel and tourism problems and emergencies

### Outcome 2

Be able to respond to problems and emergency situations

#### Assessment Criteria

The learner can:

1. produce an immediate plan of action that prioritises needs and is based on an accurate assessment of the **emergency situation** or **problem**
2. provide prompt and effective action to prevent escalation of the situation
3. give clear and relevant instructions to others assisting with the situation
4. call any relevant emergency services promptly
5. alert the correct authorities to any situation beyond personal authority or control
6. minimise any danger or distress to customers in the immediate vicinity
7. maintain an appropriate balance between the needs of the individuals and the group as a whole
8. ensure responses comply with organisational procedures and local requirements
9. minimise inconvenience to customers and maintain goodwill
10. keep accurate records of critical factors and key information where appropriate.

#### 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 **emergency situation**
  - a) accident
  - b) fire
  - c) natural disaster
  - d) death
  - e) epidemics
  - f) serious individual illness and or condition
  - g) customer arrest
  - h) violence
  - i) lost people
- at least **two** from **problem**
  - a) accommodation
  - b) lost travel documents
  - c) non availability of transport
  - d) customers property.

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

## Unit 321

## Deal with travel and tourism problems and emergencies

### Outcome 3

Know how to respond to problems and emergencies

#### Assessment Criteria

The learner can:

1. outline your organisation's procedures and guidelines for handling emergency situations
2. identify the limits of your authority and legal responsibilities for dealing with emergencies
3. describe action that can be taken to contain and handle emergency situations and the consequences of each
4. describe the factors that must be considered in order to arrive at the most suitable course of action and the consequences of failure to take such action
5. explain why different approaches may have to be used when considering the local situation and organisational policy
6. describe how to assess emergency situations
7. identify the position of emergency exits in the location(s) where you are working
8. identify the location of available emergency equipment and describe how to use it
9. identify emergency contact numbers and the nature of the help available
10. describe the role and scope of the local emergency services
11. describe the role and scope of the main support services provided by the local authorities
12. identify the types of records that must be completed in the event of an emergency and describe how to complete and submit them.

## Unit 321

## Deal with travel and tourism problems and emergencies

### Outcome 4

Be able to co-ordinate post-emergency situations

#### Assessment Criteria

The learner can:

1. promptly and clearly notify all affected parties of the situation and its implications for them
2. secure the support of the correct authorities and **sources of assistance**
3. resolve any conflicts between local customs and the organisation's procedures
4. ensure that all customers affected by the emergency are aware of the situation and reassured
5. ensure that alternative arrangements are in place for customers unable to continue with their original plans
6. ensure that sympathetic support is provided as required to those directly affected
7. make available full and accurate records of the emergency to meet local, legal and the organisation's requirements.

#### 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 **sources of assistance**
  - a) insurers
  - b) suppliers
  - c) colleagues
  - d) fellow tour operators
  - e) assistance companies or services.

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

## **Unit 321**

## **Deal with travel and tourism problems and emergencies**

### Outcome 5

Know how to co-ordinate post-emergency situations

#### **Assessment Criteria**

The learner can:

1. describe the role of any applicable assistance companies
2. give examples of the types of arrangements that can be made for customers unable to continue with their plans and how to instigate these.

## Unit 322

## Research and develop tour itineraries

**Level:** 3  
**Credit value:** 8  
**NDAQ number:** R/601/6510

### Unit aim(s)

This unit supports workforce development for those who develop tour itineraries for visitors eg local heritage sites, industrial sites, walking tours, bus tours.

The unit is designed for use primarily by tour designers, tour leaders 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 of researching and developing tour itineraries
2. Be able to research market opportunities for tours
3. Know how to research market opportunities for tours
4. Be able to research and develop tour outlines
5. Be able to develop detailed tour itineraries
6. Know how to develop tour outlines and itineraries

### Guided learning hours

It is recommended that **72** 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 Research and develop tour itineraries (approved as National Occupational Standard) unit TT39.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 322**

### Outcome 1

## **Research and develop tour itineraries**

Understand the principles of researching and developing tour itineraries

### **Assessment Criteria**

The learner can:

1. explain the importance of identifying several tour options
2. diagnose hazards and potential risks to different customer groups
3. explain the importance of detailed itinerary planning
4. explain the importance of agreeing the operating parameters of tours and agreeing the degree of responsibility and authority the guide has in managing the tour
5. explain why confidentiality is important in researching and developing tours.

## Unit 322

### Outcome 2

## Research and develop tour itineraries

### Be able to research market opportunities for tours

#### Assessment Criteria

The learner can:

1. conduct research so that outcomes are based on relevant **market research techniques** and suitable sources of market information
2. examine viable gaps in the tour market for the geographical areas in which the organisation operates
3. formulate tour routes that show best potential for success
4. categorise target customer group(s) for tours and the means of reaching them
5. describe the tour and customer profiles with the greatest market potential
6. appraise any risks associated with promoting and selling proposed tours and measures suggested to manage such risk.

#### 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 **market research techniques**
  - a) desk research
  - b) field based research.

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

## **Unit 322**

### **Outcome 3**

## **Research and develop tour itineraries**

Know how to research market opportunities for tours

### **Assessment Criteria**

The learner can:

1. identify suitable sources of market information and describe how to access them
2. explain how to use and apply effective market research techniques
3. compare the key characteristics of different customer groups and the general requirements of each when on tour
4. develop the general criteria for assessing the success of tours
5. explain how to assess the market potential of a tour
6. identify the potential risks associated with marketing and selling tours and explain how to minimise risks
7. describe the type and depth of information necessary in order to make a realistic projection of customer take-up for a tour
8. explain how to carry out and produce a cost benefit analysis linked to each potential route.

## Unit 322

### Outcome 4

## Research and develop tour itineraries

Be able to research and develop tour outlines

### Assessment Criteria

The learner can:

1. develop **tour outlines** so that informed decisions can be made about the likely level of uptake by the **target customer group**
2. assemble the key features and components of the tour
3. identify potential suppliers that meet the expectations of the **target customer group**
4. identify the route options and hazards and potential risks for the **target customer group**
5. describe the levels of co-operation and availability needed from suppliers
6. identify any advanced booking requirements
7. calculate cost-benefit analysis for each potential route
8. agree a tour outline for further detailed development and identify any necessary development resources
9. specify targets and success criteria for the proposed tour.

### 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 **target customer group**
  - a) older people
  - b) mixed age
  - c) special interest
  
- at least **three** from **tour outline**
  - a) geographical area
  - b) subject
  - c) theme
  - d) distance
  - e) timescale
  - f) proposed start and finish points
  - g) places of interest
  - h) transport.

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

## **Unit 322**

Outcome 5

## **Research and develop tour itineraries**

Be able to develop detailed tour itineraries

### **Assessment Criteria**

The learner can:

1. plan and specify the detail of tours
2. present detailed tour itineraries in the required format
3. negotiate agreements with all suppliers and parties involved in the tour that are clear comprehensive, acceptable, confirmed in writing and that maintain goodwill
4. define the roles of suppliers, colleagues and self in the tour.

### **What you must do**

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

## Unit 322

### Outcome 6

## Research and develop tour itineraries

### Know how to develop tour outlines and itineraries

#### Assessment Criteria

The learner can:

1. describe the roles and services that could be provided by suppliers
2. identify how to assess the type and extent of services required from suppliers when matched to the needs of the target customer group
3. describe how to define the tour requirements
4. describe how to identify and agree the relevant roles and responsibilities of self and suppliers
5. describe how to define the type and quantity of resources needed to develop a detailed itinerary
6. describe how to define and set tour objectives and criteria for success
7. identify factors commonly affecting itinerary design and planning
8. describe how to produce detailed tour costings
9. describe common difficulties in itinerary planning and ways to overcome them
10. explain how to plan for contingencies and the types of common problems that should be subject to contingency planning
11. describe how to estimate the effects of contingencies and unexpected delays
12. illustrate how to design flexibility into itineraries to enable suitable responses to changing circumstances during tours
13. describe how to identify and satisfy the itinerary requirements of customers with special needs
14. describe how to negotiate and agree contractual arrangements
15. describe how to identify and agree any constraints on what third parties can do
16. identify the basic current legal requirements affecting itinerary planning and agreement
17. identify format requirements of tour itinerary agreements
18. identify suitable channels and media through which to market tours to target customer groups
19. describe suitable sources of information for identifying key features and components of tours and how to access them
20. identify local regulations and customs affecting travel and tourism
21. describe any itinerary format and presentation requirements
22. explain how to agree operating parameters and define extents and levels of responsibility and authority, in tour planning.

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## Unit 323

## Plan and deliver on-site entertainment

**Level:** 3  
**Credit value:** 5  
**NDAQ number:** K/601/6609

### Unit aim(s)

This unit supports workforce development for those who provide small-scale on-site entertainment for visitors eg in resorts, in clubs, in theatres.

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

1. Understand the principles for the planning and delivery of on-site entertainment
2. Be able to plan entertainment
3. Know how to plan on-site entertainment
4. Be able to deliver and evaluate entertainment
5. Know how to deliver and evaluate entertainment

### Guided learning hours

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

### Details of the relationship between the unit and relevant national standards

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

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 323**

## **Plan and deliver on-site entertainment**

### Outcome 1

Understand the principles for the planning and delivery of on-site entertainment

#### **Assessment Criteria**

The learner can:

1. diagnose the critical factors to consider when selecting and structuring the content of events to meet customers' requirements
2. express the importance of leaving your customers with a positive impression at the close of events
3. illustrate the importance of making an evaluation of own performance and using this to inform changes to future events
4. explain the importance of establishing good working relationships with local supplier contacts
5. explain the importance of allowing sufficient time for practice and rehearsal
6. explain the importance of encouraging audience participation.

## Unit 323

### Outcome 2

## Plan and deliver on-site entertainment

### Be able to plan entertainment

#### Assessment Criteria

The learner can:

1. identify the **needs and expectations** for entertainment activities
2. check the availability of potential types of entertainment and venues
3. identify timings likely to meet needs and expectations
4. agree with the appropriate person(s), criteria for success of the planned entertainment and the methods by which customer feedback is to be gathered
5. select and plan entertainment that is suited to the venue and shows greatest potential for success
6. book **venues** to ensure that **requirements** are met
7. ensure that all necessary **resources** are available and within budget
8. brief all suppliers
9. identify health and safety hazards or potential risks and minimise their impact
10. secure necessary support from colleagues
11. ensure that suitable arrangements are in place for rehearsals and evaluation
12. identify **success criteria** for entertainment
13. plan venue layout and set-up to suit the entertainment and ensure safety.

#### What you must do

The assessor must assess assessment criteria 1-13 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 **needs and expectations**
  - a) the intended audience
  - b) the organisation
- at least **two** from **venue requirements**
  - a) location and access
  - b) type of venue
  - c) venue facilities
  - d) capacity of venue
  - e) customer facilities
  - f) health and safety
  - g) cost
- at least **two** from **resources**
  - a) equipment and material
  - b) people
  - c) publicity materials and channels
- at least **two** from **success criteria**
  - a) attendance figures

- b) timing
- c) effectiveness of content and delivery
- d) suitability of venue,
- e) level of customer satisfaction.

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

**Assessment Criteria**

The learner can:

1. describe how to set suitable, measurable criteria for the success of different events
2. explain how to select and assess venues for entertainment events, including health and safety requirements
3. identify the types and quantities of resources needed for entertainment events
4. identify where and how to source materials and equipment
5. explain when and how to use music to create and change atmosphere and mood at an entertainment event
6. describe how to set suitable, measurable criteria for the success of different events
7. describe how to structure content to make an event lively and entertaining
8. describe how to estimate venue set-up and preparation times
9. explain how different types of entertainment link to different customer groups
10. summarise the critical aspects of current health and safety legislation relevant to delivering the entertainment events
11. summarise local regulations affecting the planning and delivery of entertainment events
12. summarise the organisational requirements, standards and procedures relating to the provision of on-site entertainment by staff
13. describe types of venues available and their suitability for different events
14. explain how venue set-up and layouts can affect the effectiveness of entertainment
15. explain how to enlist the support of colleagues to participate in events
16. identify the person(s) with whom resources should be agreed
17. explain how to identify the profile of your likely customers and their needs and expectations
18. explain how and where to publicise entertainment events in order to gain maximum impact and response
19. analyse the types of entertainment possible at the resort and how these link to different customer groups.

## Unit 323

### Outcome 4

## Plan and deliver on-site entertainment

### Be able to deliver and evaluate entertainment

#### Assessment Criteria

The learner can:

1. ensure that the layout and set-up of the venue is safe and suited to the entertainment
2. ensure that customers are welcomed to the event
3. ensure that customers are comfortable and have a clear view prior to the entertainment starting
4. ensure the entertainment is delivered according to plan
5. make any necessary impromptu changes to the event in response to audience reaction
6. enhance audience enjoyment of the event through delivery style, music, pace, timing and audience participation
7. capture and retain the attention of the audience throughout the event
8. ensure that the event leaves a positive impression of the entertainment and of the organisation
9. capture and evaluate reliable customer feedback on the event to inform plans for future events.

#### What you must do

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

## **Unit 323**

Outcome 5

## **Plan and deliver on-site entertainment**

Know how to deliver and evaluate entertainment

### **Assessment Criteria**

The learner can:

1. describe how to meet and greet customers
2. explain the importance of starting and ending entertainment events on time
3. describe how to pace and time verbal material to achieve the maximum audience impact and entertainment value
4. describe how to gauge audience reaction and respond accordingly
5. describe procedures for noting and forwarding immediate customer feedback.

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## Unit 325

## Manage delivery of a tour

**Level:** 3  
**Credit value:** 4  
**NDAQ number:** T/601/6516

### Unit aim(s)

This unit supports workforce development for those who manage the delivery of tours for visitors eg bus tours.

The unit is designed for use primarily by tour managers (rather than tour guides) 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 importance of managing tours effectively
2. Be able to ensure the delivery of tour itineraries
3. Be able to care for customers on a tour
4. Be able to carry out tour administration
5. Know how to manage tour group dynamics
6. Know how to manage delivery of a tour

### 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 Manage delivery of a tour (approved as National Occupational Standard) unit TT41.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 325**

### Outcome 1

## **Manage delivery of a tour**

Understand the importance of managing tours effectively

### **Assessment Criteria**

The learner can:

1. explain the importance of maintaining good customer relations and goodwill
2. explain the importance of good time management when leading groups
3. explain the importance of giving accurate information on route and timings, before, during and at the conclusion of the tour
4. explain why it is important to brief customers fully on safety, welfare, local issues
5. explain the importance of respecting local customs, environmental, cultural and regulatory requirements in a tour area
6. explain factors affecting group behaviour
7. explain how age, customer mix and the size of group can affect the conduct of the tour
8. explain the importance of maintaining regular contact with colleagues.

## Unit 325

### Outcome 2

## Manage delivery of a tour

Be able to ensure the delivery of tour itineraries

### Assessment Criteria

The learner can:

1. comply with the **programme** and timing agreed between the organiser and suppliers
2. deliver services to the standards and quality agreed by the organiser
3. give customers relevant, clear and accurate **information** at key points throughout the tour
4. implement contingency arrangements as necessary in response to any problems and disruptions
5. handle any unforeseen events to minimise disruption and reassure customers
6. maintain the goodwill of external suppliers and customers' positive image of the organiser.

### 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 **programme**
  - a) route
  - b) breaks
  - c) visits
  - d) timings
  - e) accommodation
  - f) refreshments
- at least **three** from **information**
  - a) tour programme
  - b) local practical
  - c) local customs
  - d) local environment
  - e) basic local history
  - f) basic local socio-economic.

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

**Assessment Criteria**

The learner can:

1. maintain a welcoming, calm, available and professional approach to customers
2. maintain customers' comfort, well-being and enjoyment
3. create a positive impression of the organisation
4. meet the needs and realistic expectations of customers
5. maintain customers' awareness of any **local expectations**
6. balance the needs and expectations of individuals with those of the whole group
7. avoid identified hazards that present an unacceptable risk to group members
8. take action in case of **problems** to minimise the effects and maintain goodwill
9. deal with emergency situations promptly and calmly.

**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 **local expectations**
  - a) cultural
  - b) social
  - c) environmental
  
- at least **two** from **problems**
  - a) vehicle difficulties
  - b) minor accidents
  - c) illness
  - d) customers fail to follow the leaders instructions
  - e) customers conflict with one another
  - f) customer safety or security is compromised.

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

## **Unit 325**

Outcome 4

## **Manage delivery of a tour**

Be able to carry out tour administration

### **Assessment Criteria**

The learner can:

1. complete all required tour records and customer information and keep them safe and secure
2. ensure that customer and baggage check-in and check-out is smooth and efficient
3. provide clear and accurate information bulletins at suitable times and places
4. ensure that all administrative procedures comply with local, national and organisation requirements
5. promptly report any factors likely to affect future tours clearly to relevant person(s).

### **What you must do**

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

## Unit 325

### Outcome 5

## Manage delivery of a tour

### Know how to manage tour group dynamics

#### Assessment Criteria

The learner can:

1. describe likely causes and consequences of disruptions to the group and others
2. identify potential risks to the health, safety and security of tour groups
3. describe means of controlling risks to the health, safety and security of tour groups
4. describe the relevant parts of current legislation to include Health & Safety, working with minors, equal opportunities and Disability Discrimination and their impact on conducting a tour
5. explain the importance of assessing risks throughout a tour
6. describe how to assess risks on an ongoing basis throughout a tour
7. describe how to handle groups on a tour including dealing with disruptive customers
8. describe how to ensure the smooth and effective transition of customers in and out of accommodation and other venues.

## Unit 325

### Outcome 6

## Manage delivery of a tour

### Know how to manage delivery of a tour

#### Assessment Criteria

The learner can:

1. describe the detailed itinerary of the tour(s) and procedures for leading it
2. identify features of the itinerary in terms of what will be seen and what will be visited
3. describe customs, environmental, cultural and regulatory requirements in the tour area
4. identify the suppliers to be used and summarise their contractual arrangements
5. identify quality standards agreed by the organiser and describe the way these are to be monitored and measured
6. outline the background information you should give to customers for the tour(s) you are managing (ie local practical information, local customs, basic geographical features, basic historical and socio-economic aspects)
7. describe the options available and extent of your authority to deal with unforeseen events
8. describe the health and safety advice, guidance and procedures relevant to the tour you are conducting
9. describe the courses of action to take in the event of problems and emergencies and identify the local facilities available to deal with them and how to access them
10. identify the type(s) of documentation necessary for the particular tour(s) you are managing and describe how to complete them.

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## Unit 326

## Complete foreign exchange transactions

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

### Unit aim(s)

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 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://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
- 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
  
- 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.

## Unit 327

## Obtain and analyse customer feedback

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

### Unit aim(s)

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 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://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
- explain how to plan data collection for the most useful feedback opportunities.

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## Unit 329

## Monitor business performance

**Level:** 3  
**Credit value:** 4  
**NDAQ number:** J/601/6536

### Unit aim(s)

This unit supports workforce development for those who monitor business performance.

The unit is designed for use primarily by managers and supervisors in leisure and business travel agencies, 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 **three** outcomes to this unit. The candidate will:

1. Understand business performance monitoring
2. Be able to monitor and improve business performance
3. Know how to monitor and improve business performance

### Guided learning hours

It is recommended that **33** 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 Monitor business performance (approved as National Occupational Standard) unit TT50.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 329**

Outcome 1

## **Monitor business performance**

Understand business performance monitoring

### **Assessment Criteria**

The learner can:

1. explain the key factors that can affect business performance in the travel and tourism industry
2. explain the importance of involving staff in the collection and analysis of performance data
3. describe how to identify key business targets and performance indicators by which business performance might be judged
4. identify what information on business performance needs to be provided to others.

## Unit 329

### Outcome 2

## Monitor business performance

Be able to monitor and improve business performance

### Assessment Criteria

The learner can:

1. identify level of achievement of key business **targets and performance indicators**
2. ensure that relevant business records are accurate and up-to-date
3. investigate the causes of significant variations between planned and actual performance
4. encourage colleagues to make suggestions for improving business performance
5. develop viable plans for improving business performance.

### 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 **targets and performance indicators**
  - a) sales
  - b) costs
  - c) service provision.

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

## **Unit 329**

### Outcome 3

## **Monitor business performance**

Know how to monitor and improve business performance

### **Assessment Criteria**

The learner can:

1. explain how to keep accurate and up-to-date records
2. describe current operational features in the organisation
3. describe how to analyse business performance data
4. describe a range of internal and external factors that may cause variations between target performance and that achieved
5. describe current market conditions in the industry and their possible effects on business performance
6. identify how frequently actual business performance needs to be checked to obtain reliable data
7. describe current local market conditions and the effects on the performance of the organisation
8. describe the consequences of possible changes in operational processes
9. explain the roles of colleagues and the effects that they may have on business performance
10. describe means of presenting ideas for measures to improve business performance
11. describe any required presentation formats for business performance information
12. describe how to assess the availability of resources needed to implement possible improvements.

**Level:** 3  
**Credit value:** 3  
**NDAQ number:** L/601/5789

### Unit aim(s)

This unit supports workforce development for those who quality assure accommodation eg hotels and apartments and manage guest transfers eg arrival point to accommodation.

The unit is designed for use primarily by resort managers and supervisors 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 managing accommodation and transfers
2. Be able to manage transfers of customers from and to arrival and departure points
3. Be able to ensure that standards of customer accommodation are maintained
4. Know how to manage accommodation and transfers

### Guided learning hours

It is recommended that **25** 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 Manage accommodation and transfers (approved as National Occupational Standard) unit TT51.

### Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1<sup>st</sup>.

### Assessment

This unit should be assessed against People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 330**

Outcome 1

## **Manage accommodation and transfers**

Understand the principles of managing accommodation and transfers

### **Assessment Criteria**

The learner can:

1. explain the importance of maintaining customer confidence and goodwill
2. explain the key issues of supervising local (non-head office) staff.

## Unit 330

### Outcome 2

## Manage accommodation and transfers

Be able to manage transfers of customers from and to arrival and departure points

### Assessment Criteria

The learner can:

1. ensure that manifests and arrival and departure lists are available and correct
2. book adequate and suitable transport in advance
3. ensure that booked transport is present and available when it is needed
4. ensure that adequate numbers of staff are planned in advance and available to meet to **customers**
5. respond to any referred **customer emergencies**, problems and **requirements** promptly and in accordance with company policies
6. report any situation which cannot be resolved locally to head office
7. liaise and communicate with handling agents to maintain good working relationships whilst achieving required levels of service
8. ensure that **travel terminal** procedures and security requirements are complied with
9. accurately record reported non-compliance of the agreed standards of transfer service
10. identify non-compliance of the agreed standards of transfer service to the suppliers.

### 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 **three** from **customers**
  - a) adults
  - b) children
  - c) elderly
  - d) individuals
  - e) families
  - f) groups
- at least **one** from **customer emergencies**
  - a) medical
  - b) repatriation
- at least **one** from **customer problems**
  - a) lost luggage
  - b) lost passport
  - c) lost tickets
- at least **one** from **customer requirements**
  - a) mobility
  - b) access

- at least **one** from **travel terminal**
  - a) air
  - b) sea
  - c) coach.

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

## Unit 330

### Outcome 3

## Manage accommodation and transfers

Be able to ensure that standards of customer accommodation are maintained

### Assessment Criteria

The learner can:

1. ensure that checks on **accommodation** standards are carried out at the required frequency
2. ensure that **accommodation** standards are judged against agreed current standards
3. accurately record non-compliance of the agreed standards of **accommodation**
4. identify non-compliance of the agreed standards of **accommodation** to the suppliers
5. ensure that, where necessary, re-inspection of **accommodation** is carried out on time and against agreed standards
6. ensure that, where necessary, non-compliance with standards are reported to the appropriate person(s).

### 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 **accommodation**
  - a) hotel
  - b) self-catering.

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

## Unit 330

### Outcome 4

## Manage accommodation and transfers

Know how to manage accommodation and transfers

### Assessment Criteria

The learner can:

1. explain transport terminal procedures
2. describe suitable means of managing different types of customers
3. describe how to communicate clearly, by voice and gesture, with groups of customers on vehicles and at travel termini
4. explain how to deal with delayed or otherwise dissatisfied customers who are referred to you
5. describe the problems that can arise in transfers and accommodation and suitable means of resolving them
6. describe how to communicate effectively with local staff, handling agents (including local), transfer and accommodation providers and service providers
7. explain company procedures for transfers and inspection of accommodation
8. describe the working arrangements between carrier, handling agent and your company
9. outline expected standards of service of transfers and accommodation
10. describe procedures for referring emergencies and problems to head office
11. describe means of dealing with shortfall in standards of transfers and accommodation.

## 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.

### Details of the relationship between the unit and relevant national standards

This unit is linked to the Pro Skills Assessment Strategy

### 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 People 1<sup>st</sup> assessment strategy which can be found on People 1<sup>st</sup> website - [www.people1st.co.uk](http://www.people1st.co.uk).

## **Unit 331**

## **Ensure responsibility for actions to reduce risks to health and safety**

### **Outcome 1**

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

#### **Assessment Criteria**

The learner can:

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

## Unit 331

## Ensure responsibility for actions to reduce risks to health and safety

### Outcome 2

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

#### Assessment Criteria

The learner can:

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

## **Unit 331**

## **Ensure responsibility for actions to reduce risks to health and safety**

### Outcome 3

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

#### **Assessment Criteria**

The learner can:

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

# Appendix 1 Relationships to other qualifications

## Links to other qualifications and frameworks

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

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

This qualification has connections to the:

- Level 3 NVQ in Travel and Tourism Services (4847)

NQF units		QCF units	
Unit Number/Title		Unit Number/Title	
Unit 202	Ensure your own actions reduce risks to health and safety	Unit 331	Ensure your own actions reduce risks to health and safety
Unit 214	Process travel services bookings	Unit 214	Process travel services bookings
Unit 301	Organise your work and personal development	Unit 301	Organise your work and personal development
Unit 302	Improve the customer relationship		
Unit 303	Sell travel services	Unit 303	Sell travel-related products and services
Unit 304	Sell tailor made travel services	Unit 304	Sell tailor made travel services
Unit 305	Sell multi sector air travel	Unit 305	Sell multi sector air travel
Unit 306	Develop and maintain supportive relationships with telephone callers		
Unit 307	Analyse, evaluate and present tourism data	Unit 307	Analyse, evaluate and present tourism data
Unit 308	Contribute to supporting and developing colleagues	Unit 308	Contribute to supporting and developing colleagues
Unit 309	Monitor and solve customer service problems	Unit 309	Monitor and solve customer service problems
Unit 310	Contribute to business travel account management	Unit 310	Contribute to business travel account management
Unit 311	Build personal business traveller profiles	Unit 311	Build and maintain customers' profiles
Unit 312	Contribute to maintaining the quality of travel and tourism operations	Unit 312	Contribute to maintaining the quality of travel and tourism operations

Unit 313	Organise and implement travel and tourism promotional activities	Unit 313	Organise and implement travel and tourism promotional activities
Unit 314	Generate increased travel and tourism sales	Unit 314	Generate increased travel and tourism sales
Unit 315	Deliver and evaluate interpretive commentaries		
Unit 316	Monitor procedures to control risk to health and safety	Unit 316	Monitor procedures to safely control work operations
Unit 317	Contribute to the production of promotional and interpretative media		
Unit 318	Organise the receipt and storage of goods		
Unit 319	Source required goods and services		
Unit 320	Maintain the availability of goods for sale to customers		
Unit 321	Deal with travel and tourism emergencies	Unit 321	Deal with travel and tourism problems and emergencies
Unit 322	Research and develop tour itineraries	Unit 322	Research and develop tour itineraries
Unit 323	Plan and deliver on site entertainment	Unit 323	Plan and deliver on site entertainment
Unit 324	Research, plan and develop interpretative commentaries		
Unit 325	Manage the delivery of a tour	Unit 325	Manage the delivery of a tour
Unit 326	Complete foreign exchange transactions	Unit 326	Complete foreign exchange transactions
		Unit 223	Build and maintain relationships with customers not present
		Unit 302	Obtain and analyse customer feedback
		Unit 329	Monitor business performance
		Unit 330	Manage accommodation transfers

## 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](http://www.cityandguilds.com).

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

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

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

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

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

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

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

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

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## Useful contacts

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

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**1 Giltspur Street**  
**London**  
**EC1A 9DD**  
**T +44 0844 543 0000**  
**F +44 (0)20 7294 2400**  
**[www.cityandguilds.com](http://www.cityandguilds.com)**

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