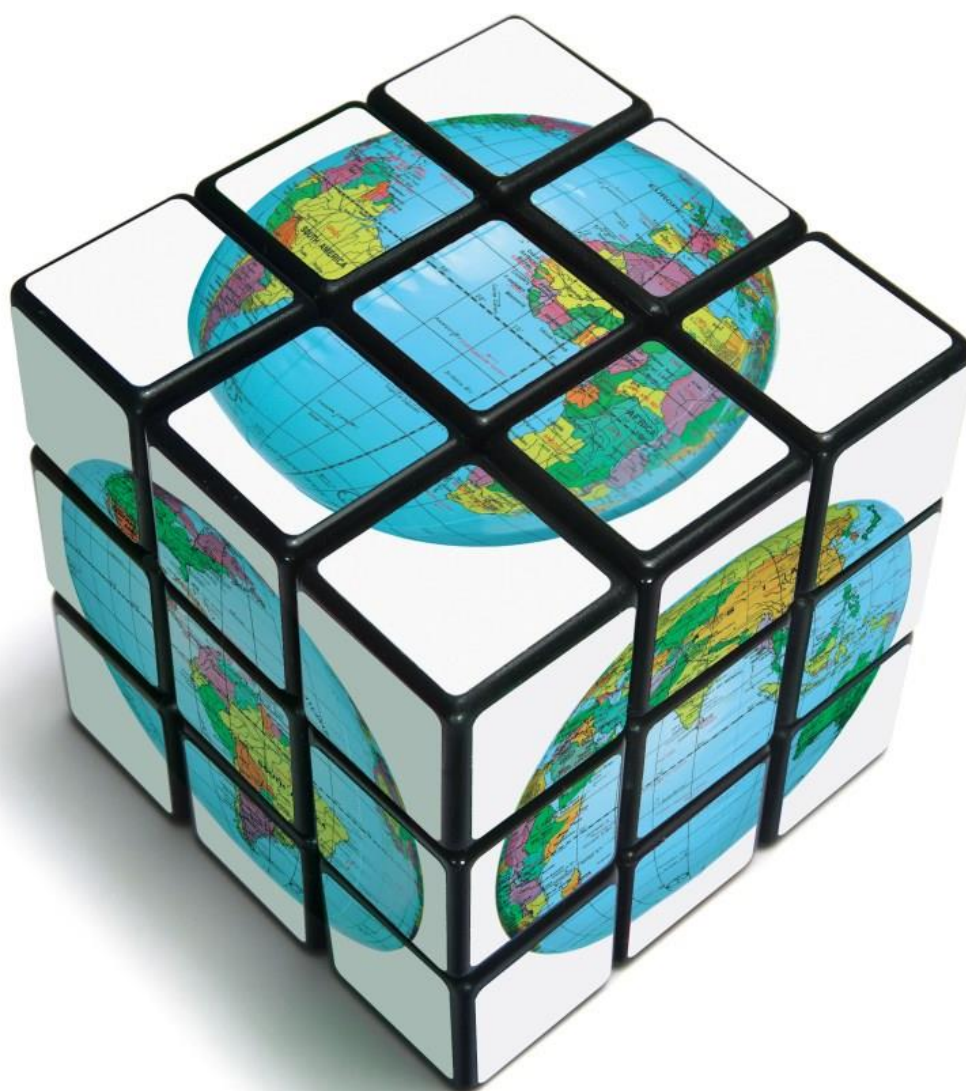


# SVQ3 in Travel Services (Leisure and Business Travel Services) at SCQF Level 6 (4931)

Qualification handbook for centres  
Leisure and Business



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# SVQ3 in Travel Services (Leisure and Business Travel Services) at SCQF Level 6 (4931)

## Qualification handbook for centres

Qualification title	Number	QAN
SVQ3 in Travel Services (Leisure and Business Travel Services) at SCQF level 6	4931-31	GC31 23

Version and date	Change detail	Section
3.0 Feb 2016	Units 502, 512, 602, 604, 607-609, 612, 614 edited to reflect updated NOS for these units. Unit 604 amended to be Level 5.	Units
	Removed pathways 4931-32 and -33, added new units: <ul style="list-style-type: none"> <li>Unit 622 Maintain a professional social network</li> <li>Unit 623 Advise and coach customers in-store/centre on the use of online facilities</li> <li>Unit 701 Develop and sustain collaborative relationships with other organisations</li> </ul>	Throughout document
3.1 May 2016	Edited title to add (Leisure and Business Travel Services)	Throughout document
21 October 2016	Unit 604 - deleted element <b>Remit foreign exchange to suppliers</b> which also included The assessor may assess 3a-3d through questioning.	Unit 604 TT17 Only

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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>	<b>City &amp; Guilds qualification number</b>	<b>Qualification accreditation number</b>	<b>Last registration date</b>	<b>Last certification date</b>
SVQ3 in Travel Services (Leisure and Business Travel Services) at SCQF Level 6	4931-31	GC31 23	Please consult the Walled Garden for last registration and certification dates	

<b>Area</b>	<b>The SVQ 3 Diploma in Travel Services (Leisure and Business Travel Services) at SCQF Level 6...</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.

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.

## 1.1 Qualification structure

To achieve the SVQ3 in Travel Services (Leisure and Business Travel Services) at SCQF Level 6, learners must achieve one mandatory unit and one unit from group A plus four units from group B. Units not taken in Group A may also be taken as optional.

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

City & Guilds unit number	Unit title	Mandatory/ optional for full qualification	SCQF level	SCQF credit value
<b>Mandatory</b>				
Unit 502	Make sure your own actions reduce risks to health and safety	Mandatory	5	8
Unit 603	Organise your work and personal development	Mandatory	6	3
<b>Group A</b>				
Unit 607	Sell travel-related products and services	Specialist optional	6	12
Unit 608	Sell tailor-made travel services	Specialist optional	6	10
Unit 609	Sell multi-sector air travel	Specialist optional	6	11
<b>Group B</b>				
Unit 512	Process travel services bookings	Optional	5	4
Unit 513	Build and maintain relationships with customers not present	Optional	5	5
Unit 602	Monitor and solve customer service problems	Optional	6	7
Unit 604	Complete foreign exchange transactions	Optional	5	6
Unit 605	Obtain and analyse customer feedback	Optional	6	4



Unit 610	Contribute to supporting and developing colleagues	Optional	6	5
Unit 611	Contribute to business travel account management	Optional	6	5
Unit 612	Build and maintain customers' profiles	Optional	6	2
Unit 613	Contribute to maintaining the quality of travel and tourism operations	Optional	6	4
Unit 614	Organise and implement travel and tourism promotional activities	Optional	6	3
Unit 615	Generate increased travel and tourism sales	Optional	6	5
Unit 616	Monitor business performance	Optional	6	4
Unit 622	Maintain a professional social network	Optional	6	4
Unit 623	Advise and coach customers in-store/centre on the use of online facilities	Optional	6	7
Unit 701	Develop and sustain collaborative relationships with other organisations	Optional	7	5

**LEISURE AND BUSINESS**

2 mandatory units:

Unit 603  
Organise your work  
and personal  
development  
(3 credits)

Unit 502  
Make sure your own  
actions reduce risks  
to health and safety  
(8 credits)

**Plus 1 specialist unit from:**

Unit 607  
Sell travel-related  
products and  
services  
(12 credits)

Unit 608  
Sell tailor-made  
travel services  
(10 credits)

Unit 609  
Sell multi-sector air  
travel  
(11 credits)

**Plus 4 optional units from:**

Unit 512  
Process travel  
services bookings  
(4 credits)

Unit 513  
Build and maintain  
relationships with  
customers not  
present  
(5 credits)

Unit 602  
Monitor and solve  
customer service  
problems  
(7 credits)

Unit 604  
Complete foreign  
exchange  
transactions  
(6 credits)

Unit 605  
Obtain and analyse  
customer feedback  
(4 credits)

Unit 610  
Contribute to  
supporting and  
developing  
colleagues  
(5 credits)

Unit 611  
Contribute to  
business travel  
account management  
(5 credits)

Unit 612  
Build and maintain  
customers' profiles  
(2 credits)

Unit 613  
Contribute to  
maintaining the  
quality of travel and  
tourism operations  
(4 credits)

Unit 614  
Organise and  
implement travel and  
tourism promotional  
activities  
(3 credits)

Unit 615  
Generate increased  
travel and tourism  
sales  
(5 credits)

Unit 616  
Monitor business  
performance  
(4 credits)

Unit 622  
Maintain a  
professional  
social network  
(4 credits)

Unit 623  
Advise and coach  
customers in-  
store/centre on the  
use of online  
facilities (7 credits)

Unit 701  
Develop and sustain  
collaborative  
relationships with  
other organisations  
(5 credits)

## 1.2 Opportunities for progression

On completion of this SVQ3 in Travel Services (Leisure and Business Travel Services) at SCQF Level 6 candidates may progress into the following City & Guilds qualifications:

- Apprenticeship
- Higher education or employment

## 1.3 Qualification support materials

<b>Description</b>	<b>How to access</b>
Qualification handbook	<a href="http://www.cityandguilds.com">www.cityandguilds.com</a>
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 SVQ3 in Travel Services (Leisure and Business Travel Services) at SCQF Level 6 (4931-31), which will be made available from the 01 April 2016.

### 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:

- a) have recent relevant experience in the specific area they will be assessing
- b) 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
- c) update their occupational expertise and industry knowledge in the areas being assessed and verified through Continuous Professional Development
- d) 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 quality assurers

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.

#### External quality assurers (EQA)

External quality assurers (EQAs) are appointed by City & Guilds to ensure that all assessments undertaken within centres are valid, consistent, sufficient, authentic and meet the requirements of the standards/syllabus. They will have an appropriate level of knowledge, experience and skill for the qualifications in which they are involved.

EQAs are responsible for:

- making approval visits/recommendations to confirm that organisations can satisfy the approval criteria
- ensuring that internal quality assurers/qualification co-ordinators are undertaking their duties satisfactorily
- monitoring internal quality assurance systems and sampling assessment activities, methods and records
- providing prompt, accurate and constructive feedback to all relevant parties on the operation of centres' assessment systems
- maintaining records of centre visits and making these available for auditing purposes

- promoting best practice
- helping centres to develop internal assessment and evidence evaluation systems that are fair, reliable, accessible and non-discriminatory
- acting as a source of advice and support.

For more information on external verification and non-compliance please refer to the Providing City & Guilds qualifications - A guide to centre and qualification approval available on [www.cityandguilds.com](http://www.cityandguilds.com)

### **External Quality Control**

External quality control is provided by the usual City & Guilds external verification process which includes the use of the online report form which is designed to provide an objective risk analysis of individual centre assessment and verification practice.

People 1<sup>st</sup>, the SSC for Hospitality, leisure, travel and tourism, holds an Awarding Body Forum which, amongst other things, will consider standardisation and interpretation issues identified via the external verification process.

City & Guilds implement a risk assessment and management of centres.

### **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**. For detailed People 1<sup>st</sup> Assessment Strategy please go to [www.people1st.co.uk](http://www.people1st.co.uk)

### 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:

- a) other approved assessors that are recognised to assess the relevant National Occupational Standards, or
- b) 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

People 1st does not permit the use of simulation, other than as listed below:

The overarching principle to be applied to units identified as suitable for simulation is that it should only be undertaken in a minority of cases where

- a) there is a high risk to the security or safety of the candidate, individuals, key people in their lives and others
- b) the opportunity to present evidence from work-based practice happens infrequently and therefore insisting that candidates wait for such an occurrence would be unreasonable or create blockages in the assessment system and might carry the risk of de-motivating candidates
- c) there would otherwise be a breach of confidentiality or privacy.

No Realistic Working Environments will be accepted:

### **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:

- a) City & Guilds reference number
- b) title
- c) level
- d) SCQF credit value
- e) unit aim
- f) unit content

### Summary of units

<b>City &amp; Guilds unit number</b>	<b>Title</b>	<b>SCQF level</b>	<b>SCQF credit value</b>
Unit 502	Make sure your own actions reduce risks to health and safety	5	8
Unit 512	Process travel services bookings	5	4
Unit 513	Build and maintain relationships with customers not present	5	5
Unit 602	Monitor and solve customer service problems	6	7
Unit 603	Organise your work and personal development	6	3
Unit 604	Complete foreign exchange transactions	5	6
Unit 605	Obtain and analyse customer feedback	6	4
Unit 607	Sell travel-related products and services	6	12
Unit 608	Sell tailor-made travel services	6	10
Unit 609	Sell multi-sector air travel	6	11
Unit 610	Contribute to supporting and developing colleagues	6	5
Unit 611	Contribute to business travel account management	6	5
Unit 612	Build and maintain customers' profiles	6	2
Unit 613	Contribute to maintaining the quality of travel and tourism operations	6	4
Unit 614	Organise and implement travel and tourism promotional activities	6	3
Unit 615	Generate increased travel and tourism sales	6	5
Unit 616	Monitor business performance	6	4
Unit 622	Maintain a professional social network	6	4
Unit 623	Advise and coach customers in-store/centre on the use of online facilities	6	7
Unit 701	Develop and sustain collaborative relationships with other organisations	7	5

## Unit 502

## Make sure your own actions reduce risks to health and safety (TT07) (ENTO Unit HSS1)

**Level:** 5  
**Credit value:** 8

### What is the unit about?

This unit is about the health and safety responsibilities for everyone in your workplace. It describes the competencies required to make sure that:

- your own actions do not create any health and safety hazards
- you do not ignore significant risks in your workplace, and
- you take sensible action to put things right, including: reporting situations which pose a danger to people in the workplace and seeking advice

Fundamental to this unit is an understanding of the terms "hazard", "risk" and "control".

### Who is the unit for?

This unit is for everyone at work (whether paid, unpaid, full or part-time). It is about having an appreciation of significant risks in your workplace, knowing how to identify and deal with them.

### Outcomes of effective performance

You must be able to:

#### **1. Identify the hazards and evaluate the risks in your workplace, so that:**

- 1a. you identify which workplace instructions are relevant to your job
- 1b. you identify those working practices in your job which could harm you or others
- 1c. you identify those aspects of the workplace which could harm yourself or other persons
- 1d. you check which of the potentially harmful working practices and the potentially harmful aspects of the workplace present highest risks to you or to others
- 1e. you deal with hazards in accordance with workplace instructions and legal requirements
- 1f. you correctly name and locate the people responsible for health and safety in your workplace
- 1g. you report, to the people responsible for health and safety in your workplace, those hazards which present the highest risks

#### **2. Reduce the risks to health & safety in your workplace, so that:**

- 2a. you carry out your work in accordance with your level of competence, workplace instructions, and legal requirements
- 2b. you control those health and safety risks within your capability and job responsibilities
- 2c. you pass on suggestions for reducing risks to health and safety to the responsible people
- 2d. you make sure that your behaviour does not endanger the health and safety of you or others in the workplace
- 2e. you follow the workplace instructions for the safe use of equipment, materials and products
- 2f. you make sure that your personal presentation and behaviour at work:
  - i. protects the health and safety of you and others,
  - ii. meets any legal responsibilities, and
  - iii. is in accordance with workplace instructions
- 2g. you make sure that you follow environmentally friendly working practices

### Behaviours which underpin effective performance

- Act responsibly at all times
- Be observant to activities going on around you

### Performance evidence

This must be gathered through observing the candidate's work for:

- at least **three** from **Risks**:
  - a) the use and maintenance of machinery or equipment
  - b) the use of materials or substances
  - c) working practices which do not conform to laid down policies
  - d) unsafe behaviour
  - e) accidental breakages and spillages
  - f) environmental factors
- at least **four** from **Workplace instructions**:
  - a) the use of safe working methods and equipment
  - b) the safe use of hazardous substances
  - c) smoking
  - d) eating
  - e) drinking and drugs
  - f) what to do in the event of an emergency
  - g) personal presentation

### Knowledge and understanding

#### General knowledge and understanding

You must know:

- what hazards and risks are
- your responsibilities and legal duties for health and safety in the workplace

You must understand:

- the importance of remaining alert to the presence of hazards in the whole workplace
- the importance of dealing with, or promptly reporting, risks

#### Industry-specific knowledge and understanding

You must know:

- your scope and responsibility for controlling risks

You must understand:

- the importance of personal presentation in maintaining health and safety in your workplace
- the importance of personal behaviour in maintaining the health and safety of you and others

#### Context-specific knowledge and understanding

You must know:

- your responsibilities for health and safety as required by the law covering your job role
- the hazards which exist in your workplace and the safe working practices which you must follow
- the particular health and safety hazards which may be present in your own job and the precautions you must take
- the responsibilities for health and safety in your job description
- the responsible people you should report health and safety matters to
- where and when to get additional health and safety assistance
- workplace instructions for managing risks which you are unable to deal with
- workplace instructions for the safe use of equipment, materials and products which you must follow
- the risks to the environment which may be present in your workplace and/or in your own job

**Level:** 5

**Credit value:** 4

### **What is the unit about?**

Travel services bookings need to be processed accurately and quickly, making sure that customers' details are captured and that all post booking documentation is up-to-date and available for customers.

In recent years with the advent and increase of electronic bookings, and the reduction in travel ticket issues, it is particularly important that post booking documentation is completed accurately and quickly for ease of availability to customers.

### **Who is the unit for?**

The unit is recommended for all staff in contact with customers and responsible for ensuring that travel arrangements are confirmed and processed speedily and accurately after products and services have been sold.

### Outcomes of effective performance

You must be able to:

1. **Complete booking administration, processing and issue of documentation and additional services so that:**
  - 1a. customers' details and booking arrangements are accurate
  - 1b. appropriate booking systems are used correctly, safely and securely
  - 1c. customers' information is recorded accurately and confidentiality is maintained
  - 1d. documentation is processed promptly after the booking is complete, following the organisation's and suppliers' procedures
  - 1e. customers and suppliers have confirmation of the services booked
  - 1f. correct copies of travel and other documentation are issued to all the relevant parties within the timescale needed and according to your organisations procedures
  - 1g. travel and additional services documentation is updated promptly and accurately where necessary
  - 1h. any discrepancies are dealt with promptly
  - 1i. booking information and documentation is handled and stored securely following the organisation's procedures and legal requirements

### Behaviours which underpin effective performance

- Work methodically and with an eye to detail
- Refer all matters outside of your work responsibilities or experience to the relevant person
- Work speedily and accurately

### Scope

The items below describe a variety of circumstances for which evidence may be required:

- **Booking:** package holidays, flights, accommodation, journey, travel, coach, rail, cruise
- **Additional services:** car hire, VIP lounges, car parking, transport to and from departure point, accommodation, insurance, pre-bookable excursions and tickets, tour operators' extras, ski packs, upgrades, other transport.
- **Documentation:** pre-issued, on departure, e-tickets, ticketless

### Knowledge and understanding

#### General knowledge and understanding

You must know:

- current industry codes of practice and legislation regarding leisure or business travel ticket-issuing responsibilities

You must understand:

- the principles of the licensing and controlling authorities rules
- the importance of accurate and secure record keeping
- how legislation affects the ways in which you record and store personal information

#### Industry-specific knowledge and understanding

You must know:

- the types of travel documentation that can be issued and completed
- how to process booking documentation, monitor and log bookings

You must understand:

- booking terms and conditions
- abbreviations and terms used on travel documentation
- multi-channel methods of making documents available to customers

#### Context-specific knowledge and understanding

You must know:

- your organisation's and suppliers procedure for completing manual or electronic bookings
- the types of travel documentation for your organisation
- the types of customer information that must be recorded and means of maintaining necessary confidentiality
- how to use current travel services booking systems

You must understand:

- the consequences of booking errors or incorrect issue or process of documents
- the importance of accuracy in documentation



# Unit 512      Process travel services bookings (TT02)

## Evidence requirements

Unit	TT02 Process travel service bookings
<b>ELEMENT</b>	<b>Complete booking administration, processing and issue of documentation and additional services</b>
What you must <b>DO</b>	<p>The assessor <u>must</u> assess 1a-1c by directly observing the candidate's work or other documentary evidence demonstrating competence.</p> <p>The assessor <u>must</u> assess 1d-1i by directly observing the candidate's work.</p>
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• at least <b>four</b> from <b>bookings</b><ul style="list-style-type: none"><li>a) <b>package holidays</b></li><li>b) <b>flights</b></li><li>c) <b>accommodation</b></li><li>d) <b>journey</b></li><li>e) <b>travel</b></li><li>f) <b>coach</b></li><li>g) <b>rail</b></li><li>h) <b>cruise</b></li></ul></li><li>• at least <b>two</b> from <b>documentation</b><ul style="list-style-type: none"><li>a) <b>pre-issued</b></li><li>b) <b>on departure</b></li><li>c) <b>e-tickets</b></li><li>d) <b>ticketless</b></li></ul></li><li>• at least <b>five</b> from <b>additional services</b><ul style="list-style-type: none"><li>a) <b>car hire</b></li><li>b) <b>VIP lounges</b></li><li>c) <b>car parking</b></li><li>d) <b>transport to and from departure point</b></li><li>e) <b>accommodation</b></li><li>f) <b>insurance</b></li><li>g) <b>pre-bookable excursions and tickets</b></li><li>h) <b>tour operators' extras</b></li><li>i) <b>ski packs</b></li><li>j) <b>upgrades</b></li><li>k) <b>other transport</b></li></ul></li></ul>

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

## Unit 513

## Build and maintain relationships with customers not present (TT52)

**Level:** 5  
**Credit value:** 5

### **What is the unit about?**

This unit describes the essential competence of establishing and developing positive relationships with customers in our intensely people-oriented industry even when we are not face-to-face with them.

The unit covers the telephone, email, video and VOIP, text message, live chat and paper-based forms of contact that are either already being used or are likely to make their presence felt in the future.

Another unit complements this, covering the building and maintaining of face-to-face relationships with customers.

### **Who is the unit for?**

The unit is recommended for staff engaged in telephone or other remote forms of contact with customers.

**Outcomes of effective performance**

You must be able to:

- 1. Establish contact with customers**, so that:
  - 1a. the quality of **communication links** are confirmed
  - 1b. you and the customers are aware of the purpose of the contact
  - 1c. all relevant customer information is gathered, recorded and assessed
  - 1d. points raised and the responses made by customers are acknowledged
  - 1e. a respectful relationship is established with the customers
  - 1f. the levels of service and quality required by your organisation are met
  - 1g. any **special communication requirements** of the customers are addressed, in line with your organisation's procedures
  
- 2. Communicate effectively with customers** so that:
  - 2a. the **customers' requirements** are understood and confirmed
  - 2b. interactions with the customers are conducted at a pace and level to suit them
  - 2c. where necessary, switches between communication links are managed to make the process as seamless as possible for customers
  - 2d. the flow of dialogue is maintained to keep customers informed of relevant activities being undertaken as the interaction progresses
  - 2e. **resources** are used effectively
  - 2f. where appropriate, information is provided to customers in line with their needs
  - 2g. the average duration of any voice conversations is in line with your organisation's requirements
  - 2h. if a colleague is monitoring your voice conversation, customers are informed in line with your organisation's requirements
  - 2i. when necessary, customers are informed when and why the interaction needs to be transferred to a colleague and, where possible, the name of the person to whom they are being transferred
  - 2j. appropriate levels of confidentiality are maintained throughout the interaction
  
- 3. Manage difficult customers effectively** so that:
  - 3a. **difficult customers** are put at ease as soon as possible
  - 3b. customers are addressed by their name where it is appropriate to do so
  - 3c. the specific needs of customers are accurately identified using effective questioning
  - 3d. the expectations of customers are managed, whilst balancing effectively their requirements with those of your organisation
  - 3e. **further action** is taken through implementing approved procedures where problems are encountered in resolving the needs of difficult customers
  - 3f. your organisation's approved procedures are followed throughout the interaction

### Outcomes of effective performance

#### Behaviours which underpin effective performance

- Introduce yourself positively, concisely and clearly using words accepted by your organisation; reflecting an interest in the customers' needs using your tone of voice, inflection and language
- Handle the conversation in a professional manner and at a pace to suit the needs of customers throughout the conversation
- Close conversations effectively and on a positive note, using words accepted by your organisation
- Communicate clearly and concisely and at a pace to suit customers whilst maintaining control of the conversation
- Use appropriate questions to obtain relevant information and to clarify customers' requirements
- Choose words that fit with customers' level of understanding and avoid the use of jargon
- Acknowledge and confirm regularly throughout the conversation, your understanding of what customers are saying
- Give responses that demonstrate empathy
- Take positive action to develop and maintain a supportive atmosphere with customers
- Remain calm and maintain an effective level of control for the conversation

#### Scope

The items below describe a variety of circumstances for which evidence may be required:

- **Communication link:** telephone, email, SMS, on-line chat, paper-based
- **Special communication requirements:** customers with hearing difficulties, customers with language difficulties
- **Customers' requirements:** information, booking, complaint
- **Appropriate questions:** open, closed, probing
- **Resources:** communications equipment, information screens, materials, information, time
- **Difficult customers:** aggressive, abusive, confused, worried, insistent
- **Further action:** seeking advice, transferring the conversation, arranging for a relevant person to contact customers, terminating the conversation

**Knowledge and understanding****General knowledge and understanding**

You must know:

- when to use open, closed and probing questions, depending upon the information being sought and the requirements of different customers
- techniques which demonstrate that you are paying attention and which maintain customers' effective participation in the different types of interaction
- the principal skills required for effective communication, using the full range of communication links; how to apply and adapt these according to the needs of different types of customers and the needs of your organisation
- techniques for maintaining control of interactions whilst promoting a positive relationship with Customers
- how to handle voice conversations involving a 'translator' acting on behalf of someone with hearing difficulties and the importance of being patient during such conversations

You must understand:

- the importance of effective "listening" and how to apply this
- the importance of maintaining a flow of interaction with customers and techniques for ensuring that this occurs whilst you update screen and manage other resources relating to such interactions
- the importance of time management and how to apply this effectively in balancing the needs of your customers with those of your organisation

**Context-specific knowledge and understanding**

You must know:

- your organisation's accepted wording when greeting and communicating with customers
- your organisation's procedures for dealing with difficult customers
- your organisation's products and or services within your area of responsibility
- your organisation's procedures and facilities for addressing the needs of customers with special communications requirements
- your organisation's procedures for informing customers where colleagues are monitoring your conversation
- your level of responsibility and to whom to refer when such levels are exceeded

## Unit 513

## Build and maintain relationships with customers not present (TT52)

### Evidence requirements

Unit	TT52 Build and maintain relationships with customers not present
<b>ELEMENT</b>	<b>Establish contact with customers</b>
What you must <b>DO</b>	The assessor must assess 1a-1g by directly observing the candidate's work.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• at least <b>two</b> from <b>communication links</b><ul style="list-style-type: none"><li>a) <b>telephone</b></li><li>b) <b>email</b></li><li>c) <b>SMS</b></li><li>d) <b>Online chat</b></li><li>e) <b>Paper based</b></li></ul></li><li>• at least <b>one</b> from <b>special communication requirements</b><ul style="list-style-type: none"><li>a) <b>customers with hearing difficulties</b></li><li>b) <b>customers with language difficulties</b></li></ul></li></ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Communicate effectively with customers</b>
What you must <b>DO</b>	The assessor must assess 1h-1q by directly observing the candidate's work.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• at least <b>two</b> from <b>customers requirements</b><ul style="list-style-type: none"><li>a) <b>information</b></li><li>b) <b>booking</b></li><li>c) <b>complaint</b></li></ul></li><li>• at least <b>two</b> from <b>resources</b></li></ul>

- 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.

ELEMENT	Manage difficult customers effectively
What you must DO	The assessor must assess 1r-1w by directly observing the candidate's work.
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"> <li>• at least <b>two</b> from <b>difficult customers</b> <ul style="list-style-type: none"> <li>a) <b>aggressive</b></li> <li>b) <b>abusive</b></li> <li>c) <b>confused</b></li> <li>d) <b>worried</b></li> <li>e) <b>insistent</b></li> </ul> </li> <li>• at least <b>two</b> from <b>effective questioning</b> <ul style="list-style-type: none"> <li>a) <b>open</b></li> <li>b) <b>closed</b></li> <li>c) <b>probing</b></li> </ul> </li> </ul>

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

## Unit 602

## Monitor and solve customer service problems (TT24) (ICS)

**Level:** 6

**Credit value:** 7

### **What is this unit about?**

This unit is all about the part of your job which involves customer contact in responding to repeated or on-going customer service problems.

It is about identifying and effectively solving repeated customer service problems. It is also about changing systems to avoid repeated customer service problems and about how you impress customers by sorting out those problems efficiently and effectively.

The unit is not about solving customer problems (such as lost tickets or medical problems). It is relevant where customers feel that they have not received satisfactory service from your organisation.

### **Who is this unit for?**

The unit is recommended for staff engaged in dealing with customers having problems with the service provided.



**Outcomes of effective performance**

When you monitor and solve customer service problems you must consistently:

1. **Identify repeated customer service problems and options for solving them**
  - 1a. identify repeated customer service problems
  - 1b. identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
  - 1c. work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation
  - 1d. solve problems with service systems and procedures that might affect customers before they become aware of them
  
2. **Take action to avoid the repetition of customer service problems**
  - 2a. obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
  - 2b. action your agreed solution
  - 2c. keep your customers informed in a positive and clear manner of steps being taken to solve any service problems
  - 2d. monitor the changes you have made and adjust them if appropriate

**Performance evidence**

This must be gathered through observing the candidate's work for:

- at least **three** from **problems**:
  - a) brought to your attention by customers or identified first by you and/or by a colleague
  - b) a difference between customer expectations and the products or services of your organisation
  - c) system or procedure failure
  - d) shortage of resources or human error
  - e) a difference between agreements with customers (eg service level agreements, contracts) and the service they actually receive
  
- **both** from **options**:
  - a) following formal organisational procedures or guidelines,
  - b) making agreed authorised exceptions to usual practice

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Problems**: brought to your attention by customers, or identified first by you and/or by a colleague; a difference between customer expectations and the products or services of your organisation, system or procedure failure, shortage of resources or human error, a difference between agreements with customers (eg service level agreements, contracts) and the service they actually receive
- **Options**: following formal organisational procedures or guidelines, making agreed authorised exceptions to usual practice

**Knowledge and understanding****General knowledge and understanding**

To be competent at monitoring and solving customer service problems you need to know and understand:

- organisational procedures and systems for dealing with customer service problems
- organisational procedures and systems for identifying repeated customer service problems
- possible consequences of repeated customer service failure
- impact of repeated customer service problems on contracts or other agreements with customers
- 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
- how to negotiate with and reassure customers while their problems are being solved

## Unit 603

## Organise your work and personal development (TT21)

**Level:** 6

**Credit value:** 3

### **What is the unit about?**

This unit is about planning and organising your workload effectively; developing your personal and professional skills and knowledge in order to meet the requirements of your job.

It is also about dealing with any changes to your role and recognising opportunities for progression in the industry.

### **Who is the unit for?**

The unit is recommended for staff engaged in any aspect of travel or tourism activities.

**Outcomes of effective performance**

You must be able to:

1. **Organise your own workload** so that:
  - 1a. **work objectives** are met by making best use of your time and resources and prioritising and planning your activities.
  - 1b. planned **work objectives** are agreed with your manager
  - 1c. unhelpful interruptions and diversions are kept to a minimum and plans are followed as closely as possible
  - 1d. work is completed satisfactorily
  - 1e. **work objectives** are achieved within the agreed deadlines
2. **Develop your personal performance** so that:
  - 2a. your own personal career aspirations and the skills and knowledge you need to achieve them are identified
  - 2b. your own development needs are identified at regular intervals and assessed against your personal and organisation's objectives
  - 2c. where support from others is needed, a suitable development plan is produced and agreed with the relevant person
  - 2d. all available opportunities to develop your skills and knowledge to meet known and anticipated work needs are recognised and taken
  - 2e. feedback from others is sought and used to help enhance your performance at work
  - 2f. development plans are reviewed and updated at regular intervals

**Behaviours which underpin effective performance**

- Review and reschedule your work to take account of things that may not go as planned
- Use your initiative to make decisions.
- Recognise how you learn and develop your skills and knowledge in the ways most effective for you

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Work objectives** - quantity of work, type of work, quality of work

**Knowledge and understanding****General knowledge and understanding**

You must know:

- different ways to develop yourself and their advantages and disadvantages
- how to set objectives for yourself which are specific, measurable and achievable
- how to estimate the amount of time required to carry out planned activities
- how to measure your work progress
- how to plan and organise your work to meet your work objectives, making best use of your time and resources available
- how to identify and minimise unhelpful interruptions to your planned work
- how to assess your own current level of competence
- how to plan and carry out self-reviews
- how to encourage and receive feedback from your colleagues and manager
- how to make constructive use of such feedback
- how to develop and manage your personal development plan

You must understand:

- the importance of continuously developing your own skills and knowledge for yourself and your organisation
- the importance of time management
- the importance of planning and organising your own work for yourself and for your organisation
- the importance of having clear, realistic work objectives and how to clarify your objectives when necessary
- the importance of planning for things that may go wrong
- the importance of reviewing your work on a regular basis and adjusting your plans
- the importance of updating your personal development plan on a regular basis and of involving other people in the process
- the importance of practising new areas of skill and knowledge and how to find opportunities to do so

**Industry-specific knowledge and understanding**

You must know:

- current and foreseeable travel and/or tourism industry changes and how these may affect the skills and knowledge needed to remain employable

**Context-specific knowledge and understanding**

You must know:

- the future responsibilities you would like to undertake and what you may need to learn to take these on
- who you should work with to identify the areas of skill and knowledge that you need to develop

You must understand:

- the importance of prompt decision making to yourself and your organisation

## Unit 603

## Organise your work and personal development (TT21)

### Evidence requirements

Unit	TT21 Organise your work and personal development
<b>ELEMENT</b>	<b>Organise own workload</b>
What you must <b>DO</b>	The assessor may assess 1a - 1e through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must <b>COVER</b>	There must be performance evidence, gathered through observing the candidate's work for: <ul style="list-style-type: none"><li>• <b>all from work objectives</b><ul style="list-style-type: none"><li><b>a) quantity of work</b></li><li><b>b) type of work</b></li><li><b>c) quality of work</b></li></ul></li></ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Develop personal performance</b>
What you must <b>DO</b>	The assessor may assess 2a-2f through questioning, witness testimony or other documentary evidence demonstrating competence.

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## Unit 604

## Complete foreign exchange transactions (TT17)

**Level:** 5

**Credit value:** 6

### **What is the unit about?**

This unit describes the competence required to maintain and undertake day-to-day foreign exchange services within a travel or tourism environment. It is appreciated that this unit may not be applicable to all candidates or work situations.

### **Who is the unit for?**

The unit is recommended for staff engaged in foreign exchange activities.



**Outcomes of effective performance**

You must be able to:

**1. Maintain foreign exchange supplies, so that:**

- 1a. foreign exchange orders are placed with your suppliers in time to meet anticipated demand and your organisation's procedures
- 1b. orders for foreign exchange are kept within your organisation's agreed branch limits
- 1c. the type and quantity of foreign exchange stocks are held in order to meet your customers' requirements at the time of demand
- 1d. the required stock balance is maintained in your own till each day
- 1e. your organisation's till audit requirements are complied with currencies are kept safe and secure at all times following your organisation's security procedures
- 1f. currency stock receipt records are accurate and up to date

**2. Sell and buy foreign exchange products to and from customers, so that:**

- 2a. up to date and accurate currency buying and selling exchange rates are displayed in the required
- 2b. the most advantageous currency to your customers is recommended, when relevant
- 2c. customers are advised on the best mix of currencies and travellers cheques to meet their individual needs
- 2d. each transaction is calculated accurately using the correct exchange rate
- 2e. all transactions are made in compliance with current regulations
- 2f. the transaction and any costs are clearly explained to your customers in a way they will understand
- 2g. any restrictions attached to foreign exchange products are clearly explained, when relevant
- 2h. prompt action is identified and taken to resolve any suspect transactions in a tactful way, following legal and your organisation's procedures
- 2i. all your transaction records are accurate and up to date and your till balances at the end of the day
- 2j. procedures are followed to maintain the safety and security of currency, documents, customers and yourself.

### Behaviours which underpin effective performance

- Work methodically and accurately
- Be alert to security and safety risks.

### Scope

The items below describe a variety of circumstances for which evidence may be required:

- **Anticipated demand:** immediate use, reserve stock, advance orders
- **Foreign exchange:** foreign currencies, currency cards
- **Exchange rate:** buy, sell

**Knowledge and understanding****General knowledge and understanding**

You must know:

- how to take payment from credit cards, debit cards and bank cheques, including validation checks
- the main requirements of current regulations affecting foreign exchange services and money laundering

**Industry-specific knowledge and understanding**

You must know:

- where to find information on national currencies worldwide
- the countries inside the Euro Zone
- currency limits and restrictions
- where to find exchange rates and what commission is charged
- where to find information on currency limits and or restrictions and what appropriate alternatives are available, if any
- the purpose and function of money transfer agents and when to use their services
- types of exchange rates and when and how to use them
- what documentation needs to be completed to record rate changes
- rules related to checking calculations
- frequency at which rates must be monitored
- when local rates must be recalculated
- how to advise customers of the best mix of currencies and currency cards when travelling in Europe, North America and the Caribbean, the Far East and Australasia
- how to explain currency transactions and their costs to customers
- how and where to access information on exchange rates
- how to calculate total transaction charges using exchange rates and commission rates

You must understand:

- the importance of offering rates that take into account local conditions (e.g. local competition, stock levels)
- the importance of displaying and using the correct exchange rates
- the importance of using competitive rates and monitoring competitors
- the significance of the spread between buying and selling rates
- the importance of giving accurate information about foreign exchange to customers

### Context-specific knowledge and understanding

You must know:

- currencies of the countries to which your organisation sends large amounts of customers
- where your branch buys foreign currency and currency cards from
- seasonal demands for particular currencies
- where to find information on orders and how to calculate anticipated needs
- the optimum amounts of stock that need to be held to meet anticipated demands
- company policy on stock management, safety and security
- your organisation's operating limits on stock holding and till cash holding limits
- minimum till floats
- who to inform regarding large buy or sell transactions and the significance of passing on information about such transactions
- organisational procedures receiving stock
- security procedures for stock handling and storage
- your organisation's stock and sales records and how to complete them
- how to document selling and buying transactions

You must understand:

- the importance of accurately forecasting needs and maintaining stocks
- company policy on establishing local exchange rates
- where to get authority to offer preferential rates
- audit requirements for checking your own till
- consequences of holding too high or too low levels of stock
- the importance of securely storing and despatching foreign exchange stocks
- limits of your personal authority to alter rates

## Unit 604

# Complete foreign exchange transactions (TT17)

## Evidence requirements

Unit	TT17 Complete foreign exchange transactions
<b>ELEMENT</b>	<b>Maintain foreign exchange supplies</b>
What you must <b>DO</b>	<p>The assessor <u>must</u> assess 1a-1c and 1e-1g by directly observing the candidate's work.</p> <p>The assessor may assess 1d through questioning, witness testimony or other documentary evidence demonstrating competence.</p>
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• at least <b>one</b> from <b>foreign exchange</b><ul style="list-style-type: none"><li>a) <b>foreign currencies</b></li><li>b) <b>currency cards</b></li></ul></li><li>• at least <b>two</b> from <b>anticipated demand</b><ul style="list-style-type: none"><li>a) <b>immediate use</b></li><li>b) <b>reserve stock</b></li><li>c) <b>advance orders</b></li></ul></li></ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Buy and sell foreign exchange products to and from customers</b>
What you must <b>DO</b>	<p>The assessor must assess assessment criteria 2a-2g, 2i &amp; 2j by directly observing the candidate's work.</p> <p>The assessor may assess 2h through questioning, witness testimony or other documentary evidence demonstrating competence.</p>
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• <b>both</b> from <b>exchange rate</b><ul style="list-style-type: none"><li>a) <b>buy</b></li><li>b) <b>sell</b></li></ul></li><li>• at least <b>one</b> from <b>foreign exchange</b><ul style="list-style-type: none"><li>a) <b>foreign currencies</b></li><li>b) <b>currency cards</b></li></ul></li></ul>

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

**Level:** 6

**Credit value:** 4

**What is the unit about?**

Customer feedback is critical to business success. In all service industries companies need to know how their customers feel about the service they have received. In the travel and tourism industries, reputation is based on trust and spread by customers, so measures to ensure that you know what customers think are essential to help ensure that any problems can be put right and positive feedback used to enhance the company's reputation.

**Who is the unit for?**

The unit is recommended for any staff who are in direct or indirect contact with customers. It is also relevant to managers who may have particular responsibility for service development, PR or supervising other staff who are providing services.

**Outcomes of effective performance**

You must be able to:

1. **Obtain customer feedback**, so that:
  - 1a. customer **feedback information** obtained is suitable for subsequent analysis
  - 1b. customers' goodwill is maintained throughout the **collection process**
  - 1c. the collection process does not damage the reputation of the company
  - 1d. information is **recorded** accurately
  - 1e. the confidentiality of customer information and feedback is maintained
  - 1f. information is stored according to organisation requirements
  
2. **Analyse customer feedback**, so that:
  - 2a. information selected for analysis is suited to the purpose of the evaluation
  - 2b. information for analysis is extracted and synthesised accurately
  - 2c. the results of analysis reflect customer feedback
  - 2d. the results of the analysis meet evaluation criteria; are presented clearly and on time
  - 2e. gaps and deficiencies in the data for analysis are identified and, where possible, rectified
  - 2f. the accuracy of analysis is enhanced as necessary, by seeking further assistance from others

**Behaviours which underpin effective performance**

- Establish and maintain productive relationship with customers providing feedback

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Feedback information:** quantitative, qualitative
- **Collection process:** face-to-face, telephone
- **Recorded:** manually, electronically



**Knowledge and understanding****General knowledge and understanding**

You must know:

- a variety of ways of obtaining feedback from customers
- how to identify key data that will meet the needs of the evaluation

You must understand:

- the principles of customer research
- the principles of sampling customers to obtain feedback

**Industry-specific knowledge and understanding**

You must know:

- suitable opportunities to approach customers for feedback
- a variety of means of asking customers for feedback
- the variety of feedback data that can be obtained from customers and its validity in meeting evaluation needs
- how to select the most useful feedback opportunities and plan data collection

**Context-specific knowledge and understanding**

You must know:

- factors affecting the collection and analysis of customer feedback data
- constraints of time, cost and staffing that affect obtaining and analysing customer feedback

# Unit 605 Obtain and analyse customer feedback (TT23)

## Evidence requirements

Unit	TT23 Obtain and analyse customer feedback
<b>ELEMENT</b>	<b>Obtain customer feedback</b>
What you must <b>DO</b>	The assessor may assess 1a-1f through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• at least <b>two</b> from <b>feedback</b><ul style="list-style-type: none"><li>a) <b>quantitative</b></li><li>b) <b>qualitative</b></li></ul></li><li>• at least <b>one</b> from <b>collection process</b><ul style="list-style-type: none"><li>a) <b>face-to-face</b></li><li>b) <b>telephone</b></li></ul></li><li>• at least <b>one</b> from <b>record</b><ul style="list-style-type: none"><li>a) <b>manually</b></li><li>b) <b>electronically</b></li></ul></li></ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Analyse customer feedback</b>
What you must <b>DO</b>	The assessor may assess 2a-2f through questioning, witness testimony or other documentary evidence demonstrating competence.

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## Unit 607

## Sell travel-related products and services (TT01)

**Level:** 6  
**Credit value:** 12

### **What is the unit about?**

Customers are increasingly aware of the choices available to them when booking leisure or business travel and any additional services that they need. This may be partly due to the availability of online resources for finding information and making tailored bookings, but it means that customers turn to travel practitioners for expert advice and help, beyond providing very basic information and websites.

It is important that customers are aware of the most suitable products and services that are in line with their needs, which are now often more complex and complicated to meet. It is part of the practitioner's job to help define those needs in order to offer the most suitable products.

This unit describes the competence needed to sell leisure or business travel services along with other products or services needed by the customer to complete their travel experience.

### **Who is this unit for?**

The unit is recommended for all staff in contact with customers and responsible for ensuring that the customers' needs are met in line with the products and services available from the organisation.

**Outcomes of effective performance**

You must be able to:

1. **Identify customers' travel needs, so that:**
  - 1a. travel products and services that best match the customer's needs are identified and offered
  - 1b. customer information is recorded, processed and stored to meet the organisation's procedures and legal requirements
  - 1c. any additional requirements of the customer are identified
  - 1d. customers are presented with clear responses to queries, and solutions to issues
  - 1e. the customer receives clear and accurate information on travel services, costs, legal requirements and additional services at the close of the sale
  
2. **Promote the features and benefits of travel products and services so that:**
  - 2a. customers are sold travel services that match their needs and are in line with organisational policies
  - 2b. those features of travel products and services that accurately match the customer's needs are clearly explained and customer understanding is confirmed
  - 2c. benefits are promoted clearly, accurately and in a way which generates further interest from the customer
  - 2d. customers are given opportunities to fully discuss and explore features and benefits
  - 2e. customers' objections are dealt with positively
  - 2f. relevant terms, conditions and legal requirements relating to the sale are described clearly
  
3. **Close the sale, so that:**
  - 3a. customers' intention to buy is sought at a suitable time in the discussion
  - 3b. extra travel products and services are identified and sold effectively
  - 3c. the total cost of all products and services is given to customers
  - 3d. any follow-up with customers complies with organisational and legal requirements
  - 3e. customers are positively reassured following their buying decision
  - 3f. the sale meets your organisation's procedures and legal requirements

**Behaviours which underpin effective performance**

- Greet customers in a prompt, friendly and confident manner
- Establish and maintain a positive relationship with customers so that the exchange is a positive and friendly one
- Find out your customers' needs by using suitable questioning techniques and effective listening skills
- Record customers' information accurately and maintain adequate confidentiality
- Demonstrate a clear understanding and awareness of the range of different customers and their needs
- Promote travel products and services in accordance with your organisation's policies and procedures
- Handle queries in ways that promote sales and/or requests and build customers' confidence
- Remain open and flexible in responding to customers, following their cues and using suitable questioning techniques and listening skills
- Take opportunities to promote new and different possibilities to enhance customers' experiences

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **travel products and services:** package holidays, flights, accommodation, ferry travel, coach, rail, cruises
- **additional requirements:** dietary, health, mobility
- **extra travel products and services:** car hire, VIP lounges, car parking, transport to and from departure point, accommodation, pre-bookable excursions and tickets, tour operators' extras, ski packs, upgrades, other transport, passports and visas.

**Knowledge and understanding****General knowledge and understanding**

You must know:

- sources of information (electronic, paper-based) relating to products and services and how to use and interpret them
- how to use questioning techniques and listening skills to identify customer needs
- how to use selling techniques, including: establishing rapport, investigating needs; matching up needs and wants; presenting features and benefits; offering alternatives; gaining commitment and closing the sale
- how to communicate effectively with customers in different sales situations

You must understand:

- the main principles of service and information provision to customers
- the importance of up to date information systems
- the need for confidentiality and the implications of data protection legislation
- the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers
- the main requirements of legislation when dealing with customers

**Industry-specific knowledge and understanding**

You must know:

- names, locations and conditions of popular destinations and travel geography; features of destinations
- the different types of accommodation, e.g. hotels, self-catering, guesthouses and B&Bs, caravan, camp sites and holiday centres; room types, facilities and meal basis
- the different methods of paying for travel services
- how to use and interpret websites, brochures and timetables to provide information and costings
- how to identify and interpret booking conditions and specific restrictions relating to the products and services offered by your organisation

You must understand:

- the contractual responsibilities of the lead passenger
- the main and current trade codes of practice when selling leisure or business travel
- why it is important to ensure that information provided to customers is accurate and up to date
- consequences of misrepresentation (e.g. in the context of brochure amendments and or updates) during discussions with customers

**Context-specific knowledge and understanding**

You must know:

- the range of the organisation's available products and services
- key features of the products and destinations which are popular with your organisation's customers
- your organisation's policies and procedures relating to the sale of products and services and the importance of following them
- where information can be found on services
- the range of technologies available to you and how these can be used
- your organisation's and any legal requirements for advising customers (e.g. retail-related requirements, booking conditions and insurance requirements, including current, applicable regulatory guidelines for insurance selling)

You must understand:

- how the package of travel and additional services can be combined to match the needs of customers



# Unit 607      Sell travel-related products and services (TT01)

## Evidence requirements

Unit	TT01 Sell travel-related products and services
ELEMENT	Identify customers' travel needs
What you must <b>DO</b>	The assessor <u>must</u> assess 1a - 1e by directly observing the candidate's work.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"> <li>• at least <b>three</b> from <b>travel products and services</b> <ul style="list-style-type: none"> <li>a) package holidays</li> <li>b) flights</li> <li>c) accommodation</li> <li>d) coach</li> <li>e) rail</li> <li>f) cruises</li> </ul> </li> <li>• at least <b>two</b> from <b>additional requirements</b> <ul style="list-style-type: none"> <li>a) dietary</li> <li>b) health</li> <li>c) mobility</li> </ul> </li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
ELEMENT	<b>Promote the features and benefits of travel products and services</b>
What you must <b>DO</b>	<p>The assessor <u>must</u> assess 2a-2d and 2f by directly observing the candidate's work.</p> <p>The assessor may assess 2e through questioning or witness testimony.</p>
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"> <li>• at least <b>three</b> from <b>travel products and services</b> <ul style="list-style-type: none"> <li>a) package holidays</li> <li>b) flights</li> <li>c) accommodation</li> <li>d) coach</li> <li>e) rail</li> <li>f) cruises</li> </ul> </li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>

**ELEMENT****Close the sale**

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What you must **DO**

The assessor must assess 3a-3c, 3e & 3f by directly observing the candidate's work.

The assessor may assess 3d through questioning or witness testimony.

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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.

**Level:** 6  
**Credit value:** 10

**What is the unit about?**

This unit describes the competence required to identify, research, formulate and agree tailor-made travel arrangements with customers. Customers are becoming increasingly knowledgeable with access to more information on options for travelling, holidays and destinations. The ability to fully understand individual customer requirements, identify and suggest alternatives and options to enhance your customers' travel experience is essential to be able to create packages, often specialist, to exactly meet their needs.

**Who is the unit for?**

The unit is recommended for any staff who need to create bespoke travel services packages, through face-to-face, telephone or electronic contact with customers.

**Outcomes of effective performance**

You must be able to:

1. **Identify and research your customer's travel needs**, so that:
  - 1a. customers are presented with a range of clearly presented and accurate travel options from different relevant suppliers
  - 1b. customer needs have been understood, summarised and confirmed through the use of appropriate questioning techniques and effective listening
  - 1c. customers have all possible options made available to them to best meet their expectations and enhance their travel experience
  - 1d. customers are made aware of all the possible options and their advantages
  - 1e. suitable records of customer enquiries and needs are made and correctly processed
  
2. **Formulate and present tailor made travel services and costings** so that:
  - 2a. travel itineraries and costings likely to meet your customers' expectations are put together using the outcomes of research
  - 2b. customer expectations and your organisation's sales objectives are met through proposals put to customers
  - 2c. specific features and benefits which match or exceed your customers' requirements are highlighted
  - 2d. customers are presented with suitable alternatives where proposals do not specifically match their original requirements
  - 2e. proposals meet legal and industry codes of practice requirements
  - 2f. customers' understanding of your proposals is confirmed and their queries and objections are answered accurately
  
3. **Discuss and agree the transaction** so that:
  - 3a. all parties are satisfied on the agreement of the supply of the travel services
  - 3b. you accurately summarise and record the agreement reached all agreements and records of agreements conform to requirements
  - 3c. customers are positively reassured following their buying choice
  - 3d. the transaction is completed, meeting your organisation's procedures and legal requirements

**Behaviours which underpin effective performance**

- Greet customers in a prompt, friendly and confident way
- Find out your customers' needs and expectations by using suitable questioning techniques and effective listening skills and recording the results
- Summarise your understanding of your customers' needs and expectations accurately
- Evaluate information about possible options to identify the potential advantages and disadvantages to both your customers and your organisation
- Present your proposals in a way that helps customers' understanding, creates goodwill and promotes a positive image of yourself and your organisation

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Questioning techniques** - open questioning, closed questioning
- **Options** - routings, modes of transport, types of accommodation, costings, places of interest, local culture and customs, special interests
- **Requirements** - organisational, legal, industry codes of practice
- **Records of customer enquiries and needs** - to improve efficiency of service for customer, for analysis to build customer profiles

**Knowledge and understanding****General knowledge and understanding**

You must know:

- types of travel insurance available including amounts of cover, conditions, exclusions and excesses
- the questions to ask to determine customers' eligibility for insurance (e.g. regarding age, pregnancy, medical history, etc.)
- British Citizen Passport and British Subject Passport requirements for UK departures
- visa types and where to find information on visa and passport entry requirements
- the different entry requirements for EU and non-EU passport holders to major destinations world wide
- what information to give customers to enable them to find out current mandatory and recommended health precautions
- sources of foreign exchange or currency cards and how to obtain them
- import and export limits imposed by certain countries
- car rental basic terms and abbreviations
- why it is important to ensure that information provided to customers is accurate and up to date
- the role of clear and accurate proposals in negotiating and finalising the transaction
- how to formulate and make both written and verbal proposals to customers for tailor-made travel
- how to identify your customers' requirements and expectations
- how to avoid difficulties arising from the mismatch of proposals and customers' requirements and present alternatives
- how to anticipate customer queries linked to the proposals you have made
- how to conduct the presentation of proposals in a manner which is appropriate to your customer
- how to explain relevant booking conditions and restrictions so that they are understood by your customers
- how to modify proposals and the limits of your own authority for doing so
- how to identify unresolved aspects of proposals
- how to influence customers' decisions by using your experience and knowledge to overcome objections
- how to balance the needs of your organisation and the customers
- how to listen and respond sensitively and develop points and ideas
- how to build rapport to encourage open dialogue and seek further information on customers' needs
- how to match your language and style to suit the situation and needs of your customers
- how to structure what you say to help customers follow a line of thought or number of points clearly
- how to use verbal or visual illustrations to help your customers understand any points you are making

You must understand:

- how to apply knowledge of visa and passport requirements to individual circumstances
- how and when to question customers about passports and visas
- the difference between business insurance and leisure insurance

**General knowledge and understanding (continued)**

You must understand:

- the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers

**Industry-specific knowledge and understanding**

You must know:

- the names and locations of:
  - i. UK towns, cities, gateway airports and seaports and physical features
  - ii. UK tourist attractions, regions and resorts, national parks
- the following in relation to outbound tourism from the UK to major travel destinations in the rest of the world:
  - i. the location of continents, countries, capitals, resorts, gateway airports and seaports, major towns, cities, tourist attractions, oceans and seas, main physical features
  - ii. climate, time zones, currencies and languages
  - iii. food, clothing, shopping, entertainment, and culture
- the locations and features of specialist destinations in relation to:
  - i. adventure and activity holidays
  - ii. health and wellness
  - iii. sporting events
  - iv. festivals and other special events
  - v. historical and architectural interest
  - vi. business centres and conference destinations
- where to source elements of tailor-made travel
- implications of using internal and or external sourcing in relation to ATOL and package holiday legislation, where relevant the main types of air products and suppliers
- the official grading schemes operating within countries worldwide and the differences between them
- the different types of accommodation including hotels, self-catering, all inclusive; private accommodation and holiday centres; room types, facilities and meal basis
- the different methods of booking and paying for accommodation only, including the implications of guaranteed reservations
- the terminology used when making accommodation only reservations (e.g. 'on request') the main types of products and categories of principals, including specialist products and principals
- the relationship between agents and principals
- the commissions payable by different suppliers
- service charges - what they are and when they need to be applied
- the main industry trade associations, their main purposes and the benefits of membership to your organisation and customers
- 3-letter airport codes, 2-letter airline codes and how to encode and decode them
- what ATOL stands for and what protection ATOL offers; when an ATOL licence is required and what products are and are not covered
- your legal obligations when advising customers (e.g. general requirements of package holiday legislation, ATOL financial protection arrangements (if appropriate); booking conditions; passport, visa, health and insurance requirements, including current, applicable regulatory guidelines for insurance selling)
- the consequences of misrepresentation (e.g. in the context of brochure/website amendments and or updates) during discussions with customers

**Industry-specific knowledge and understanding (continued)**

You must know:

- your organisation's policies relating to costs and the importance of containing costs
- sources of European and worldwide travel information and how to access and interpret them
- how to identify customers' requirements for tailor-made travel
- how to use and interpret any relevant websites, databases, brochures, timetables, fare schedules and price lists to provide information and costings
- how to put together an itinerary to achieve the most logical, realistic and economic sequence of events
- how to arrange transfer, accommodation, sightseeing and stopover packages and any other arrangements
- how to cost tailor-made travel
- how to provide air travel costings (including straightforward supplements and reductions) and information on booking conditions (e.g. transfers, reconfirmation, cancellation fees)
- how to calculate service and credit card charges according to suppliers' and your organisation's guidelines
- how and when to use the phonetic alphabet
- how to calculate local times, distances and elapsed journey times
- how to check the different booking conditions attached to travel products and services and any relevant restrictions
- how to use and interpret reference sources to provide costings (in sterling) and information on different groups and models of rental vehicle, main conditions of rental including eligibility (e.g. age, endorsements), insurance including collision damage waivers, personal accident insurance and top ups

You must understand

- the need for confidentiality and the implications of data protection legislation

**Context-specific knowledge and understanding**

You must know:

- your organisation's main responsibilities under current industry codes of practice
- your organisation's position on preferred operators
- the legal requirements for accurate quotations and record keeping
- the legal implications of indemnities, advertising, contractual relationships and acting on behalf of customers and principals
- the importance of following Foreign Office advice
- the importance of ATOL in relation to tailor-made holidays
- your organisation's objectives and your own personal targets
- the organisational, legal and industry codes of practice to which your agreements with customers and records must conform
- your organisation's procedures relating to the sale of travel services and the importance of following them



**Context-specific knowledge and understanding (continued)**

You must know:

**Cruising (Leisure only)**

- cruising operators, routes, ship types, capacity and tonnage
- major cruising ports
- cruising terms and cabin types
- differences between cruising and other travel products (e.g. dress codes, tipping, methods of payment on board)
- how to use and interpret brochures or websites to provide information on
  - i. all types of cruising, European and worldwide, including fly/cruise, special interest, round the world and cruise and stay
  - ii. deck plans, on-board facilities, excursions, entertainment and restaurant sittings
- how to provide costings for all types of cruising

**Rail holidays (Leisure only)**

- train and rail operators, types of train, types of train journey
- main train holiday or tourist routes worldwide and in Europe
- how to use and interpret brochures or websites to provide information on train or rail holidays including special interest
- how to provide costings for all types of train or rail holiday

# Unit 608 Sell tailor-made travel services (TT12)

## Evidence requirements

Unit	TT12 Sell tailor-made travel services
<b>ELEMENT</b>	<b>Identify and research customers' travel needs</b>
What you must <b>DO</b>	The assessor <u>must</u> assess 1a-1e by directly observing the candidate's work.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• <b>both</b> from <b>Questioning techniques</b><ul style="list-style-type: none"><li>a) <b>Open questioning</b></li><li>b) <b>Closed questioning</b></li></ul></li><li>• at least <b>two</b> from <b>Options</b><ul style="list-style-type: none"><li>a) <b>Routings</b></li><li>b) <b>Modes of transport</b></li><li>c) <b>Types of accommodation</b></li><li>d) <b>Costings</b></li><li>e) <b>Places of interest</b></li><li>f) <b>Local culture and customs</b></li><li>g) <b>Special Interests</b></li></ul></li><li>• At least <b>one</b> from <b>Records of customer enquiries and needs</b><ul style="list-style-type: none"><li>a) <b>To improve efficiency of service for customer</b></li><li>b) <b>For analysis to build customer profiles</b></li></ul></li></ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Formulate and present tailor made travel services and costings</b>
What you must <b>DO</b>	The assessor <u>must</u> assess 2a-2f by directly observing the candidate's work.
<b>ELEMENT</b>	<b>Discuss and agree the transaction</b>
What you must <b>DO</b>	The assessor <u>must</u> assess 3a-3d by directly observing the candidate's work.

What you must  
**COVER**

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

- At least **two** from **requirements**
  - a) 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.

## Unit 609

## Sell multi-sector air travel (TT27)

**Level:** 6  
**Credit value:** 11

### **What is the unit about?**

This unit describes the competence required to sell scheduled, multi-sector air travel. It also includes the sale of commonly used additional services related to air travel.

### **Who is the unit for?**

The unit is recommended for anyone in contact with customers and responsible for selling multi-sector air travel.

**Outcomes of effective performance**

You must be able to:

1. **Identify your customers' air travel requirements and options**, so that:
  - 1a. customers' requirements are accurately summarised and confirmed
  - 1b. options offered best match the customers' expressed needs
  - 1c. any restrictions applicable to your customers are accurately explained using language they will understand
  - 1d. air travel arrangements are promoted to customers in an appropriate manner
  - 1e. opportunities for selling additional services are taken at a suitable time
  - 1f. the outcomes of discussions with customers are accurately recorded using the organisation's procedures
  
2. **Promote the features and benefits of different air travel arrangements**, so that:
  - 2a. customers are aware of the main features of air travel arrangements that match their needs
  - 2b. further interest is generated from customers
  - 2c. buying signals are correctly interpreted and acted upon
  - 2d. customers have opportunities to fully discuss and explore features and benefits
  - 2e. methods of promoting travel services fully comply with organisational policies
  - 2f. descriptions of air travel arrangements meet current industry codes of practice and legal requirements
  
3. **Overcome customer's objections and answer their queries**, so that:
  - 3a. customers' objections are clarified
  - 3b. customers' objections are resolved where possible
  - 3c. possible alternative solutions match customers' needs
  - 3d. where objections cannot be resolved, suitable follow-on action is taken
  - 3e. customers' confidence is built and retained
  
4. **Close the sale**, so that:
  - 4a. customers' confirm their intention to buy and are positively reassured
  - 4b. the total cost of all services agreed is accurately calculated and advised to customers
  - 4c. the sale is completed following organisational procedures and in compliance with legal requirements
  - 4d. opportunities to promote and sell additional services are taken

### Behaviours which underpin effective performance

- Greet customers in a prompt, friendly and confident way
- Find out your customers' needs and budget by using suitable questioning techniques and effective listening skills
- Find and offer suitable options that best match your customers' needs in a helpful, friendly and positive manner
- Identify air travel arrangements that match your customers' needs
- Use of effective questioning and discussion

### Scope

The items below describe a variety of circumstances for which evidence may be required:

- **Follow-on action:** ask a colleague for assistance, refer to a senior colleague, apologise for the inability to progress things further
- **Additional services:** car hire, VIP lounges, car parking, airport transfers, accommodation, insurance, other transport
- **Questioning techniques:** open questioning, closed questioning, probing

**Knowledge and understanding****General knowledge and understanding**

You must know:

- the names and location of continents and countries
- the location of major domestic and international tourist attractions and special events
- the types of currencies and conversion rates in use in major destinations worldwide
- the official languages in use in major destinations worldwide the climate in major tourist destinations worldwide
- world time zones and their impact on travel arrangements
- how to read and interpret worldwide maps to identify the location of major airports, tourist destinations, capital cities, major cities and country groups
- how to use selling techniques to make sales, including establishing rapport; investigating needs (including the use of open, closed and probing questioning techniques, and listening skills); matching up needs and wants; presenting features and benefits; overcoming objections; offering alternatives; gaining commitment and closing the sale

You must understand:

- why it is important to ensure that information provided to customers is accurate and up to date
- the need for confidentiality and the implications of data protection legislation
- why it is important to show an interest in the customer and use personal knowledge, colleagues' experience and team work to display a professional attitude and create a positive impression

**Industry-specific knowledge and understanding**

You must know:

- Common air fare concepts and how these impact on the offer presented to the customer (including open-jaw itineraries, low-cost carriers, split ticketing, interline agreements, codeshares, airline alliances, net/consol fares, private fares, route deals, and niche fares e.g. marine and offshore fares).
- the main types of air products and suppliers
- the location and selling features of worldwide destinations car rental terms and abbreviations
- features, benefits and costs of VIP lounges
- main suppliers and any restrictions to VIP lounge access
- location of parking sites in relation to major UK departure airports
- the services offered by the main car parking organisations in the UK
- where to access information on the type and availability of transfers at major destination airports worldwide

**Industry-specific knowledge and understanding (continued)**

You must know:

- where to access and how to interpret information about onward transportation options worldwide
- official grading and categorisations for accommodation
- the different types of accommodation including hotels, self-catering, private accommodation and holiday centres; room types, facilities and meal basis
- the different methods of booking and paying for accommodation only, including the implications of guaranteed reservations
- the terminology used when making accommodation only reservations
- types of travel insurance available including amounts of cover, conditions, exclusions and excesses
- the differences and limitations of business insurance and leisure insurance, including sports cover
- British Citizen Passport and British Subject Passport requirements for UK departures
- visa types and where to find information on visa and passport entry requirements
- the different entry requirements for EU and non-EU passport holders to major destinations worldwide
- what information to give customers to enable them to find out current mandatory and recommended health precautions
- sources of information relating to air travel services and how to use and interpret them
- the content of the current IATA knowledge specification at a minimum of Level 1, including fundamental knowledge of the BSP system
- the types and functions of Global Distribution Systems (GDS)
- service charges - what they are and when they need to be applied
- your legal obligations when advising customers, including: general requirements of air travel legislation; ATOL financial protection arrangements (if appropriate); passenger liability restrictions (if appropriate); booking conditions; passport, visa, health and insurance requirements, including current, applicable regulatory guidelines for insurance selling
- the consequences of misrepresentation during discussions with customers
- the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers
- a travel agent's main responsibilities under current industry codes of practice
- how to use and interpret reference sources to provide car hire information and costs on different groups and models
- how to find the customer's eligibility for different insurance products (e.g. regarding age, pregnancy, medical history, etc.)
- how to apply knowledge of visa and passport requirements to individual circumstances
- how to question customers about passports and visas
- how to check the different booking conditions attached to travel services and any relevant restrictions
- how to explain relevant booking conditions and restrictions so that they are understood by your customers
- how to calculate service and credit card charges
- main conditions of car rental including eligibility (e.g. age, endorsements)



**Context-specific knowledge and understanding**

You must know:

- the car insurance provision offered by the car hire suppliers used by your organisation, including collision damage waiver, personal accident insurance and top-ups
- where to access car parking charges and how to calculate costs
- where to access information on whether transfers are included in the price of flight tickets or accommodation booked
- your organisation's procedures relating to the sale of air travel services and the importance of following them
- your organisation's requirements on preferred operators
- how to purchase a transfer when not included

## Unit 609 Sell multi-sector air travel (TT27)

### Evidence requirements

Unit	TT27 Sell multi sector air travel
<b>ELEMENT</b>	<b>Identify your customers' air travel requirements and options</b>
What you must <b>DO</b>	The assessor <u>must</u> assess 1a-1f by directly observing the candidate's work.
<b>ELEMENT</b>	<b>Promote the features and benefits of different air travel arrangements</b>
What you must <b>DO</b>	The assessor must assess 2a-2f by directly observing the candidate's work.
<b>ELEMENT</b>	<b>Overcome customer's objections and answer their queries</b>
What you must <b>DO</b>	The assessor must assess 3a-3d by directly observing the candidate's work.
	The assessor may assess 3e through questioning or witness testimony if no naturally occurring evidence is available.
What you must <b>COVER</b>	There must be performance evidence, gathered through observing the candidate's work for: <ul style="list-style-type: none"><li>• at least <b>two</b> from <b>follow on action</b><ul style="list-style-type: none"><li><b>a) ask a colleague for assistance</b></li><li><b>b) refer to a senior colleague</b></li><li><b>c) apologise for the inability to progress things further</b></li></ul></li></ul> Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
<b>ELEMENT</b>	<b>Close the sale</b>
What you must <b>DO</b>	The assessor must assess 4a-4d by directly observing the candidate's work.
What you must <b>COVER</b>	There must be performance evidence, gathered through observing the candidate's work for: <ul style="list-style-type: none"><li>• at least <b>three</b> from <b>additional services</b><ul style="list-style-type: none"><li><b>a) car hire</b></li><li><b>b) VIP lounges</b></li><li><b>c) car parking</b></li><li><b>d) airport transfers</b></li><li><b>e) accommodation</b></li><li><b>f) insurance</b></li><li><b>g) other transport</b></li></ul></li></ul> Evidence for the remaining points under 'what you must cover' may be assessed through questioning ( <b>at least two points</b> ) or witness testimony.

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## Unit 610

## Contribute to supporting and developing colleagues (TT22)

**Level:** 6

**Credit value:** 5

### **What is the unit about?**

Our industry is very much about teamwork, whether in a travel shop, tourism office, head office or even in a resort. This unit covers the competence required to support your colleagues by keeping them informed, supporting them in their day to day work activities and helping to improve their skills and knowledge on the job.

### **Who is the unit for?**

The unit is recommended for staff engaged in supporting colleagues in any kind of travel and tourism activities.

**Outcomes of effective performance**

You must be able to:

1. **Arrange and carry out team briefings** so that:
  - 1a. accurate information for the **team briefing** session is obtained from the relevant source
  - 1b. the team briefing is held at a time and place that is suitable for the people involved and they have sufficient notice and prior information
  - 1c. the purpose of the **team briefing** and the issues to be discussed are clearly explained
  - 1d. information is presented confidently and as completely and accurately as possible
  - 1e. information is presented in a format and way that is easily understood by your colleagues
  - 1f. the **team briefing** is kept to time, and purpose and discussions are relevant
  - 1g. all your team members are encouraged to contribute and are offered feedback, when necessary
  - 1h. colleagues have understood the content of the briefing and any misunderstandings are dealt with before closing the briefing session
  
2. **Support colleagues to improve their effectiveness and personal development** so that:
  - 2a. colleagues are aware of the skills and knowledge you could share with them to help improve and/or assist their work
  - 2b. support is only offered in those areas in which you are confident and competent
  - 2c. suitable support is identified and given on those occasions where your colleagues need immediate assistance
  - 2d. colleagues are allowed to practice the tasks you have demonstrated under your supervision until they are confident and competent
  - 2e. instructions and explanations are given in a clear and structured way using language your colleagues understand
  - 2f. colleagues are given information that is relevant and sufficient for their work needs
  - 2g. colleagues' understanding of what is expected is checked and any misunderstandings corrected
  - 2h. all your instructions and task demonstrations are in line with organisational and any legal requirements.

**Behaviours which underpin effective performance**

- Correctly demonstrate tasks to your colleagues when they lack the skills, knowledge and confidence to perform them
- Give constructive feedback in a way that supports your colleagues' self confidence and praise them when they perform tasks correctly

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Team briefings** for: product updates, organisational updates, supplier promotions, competitors' activity, sharing customer feedback
- **Organisational and any legal requirements:** Performance management, employment law, diversity policy, staff welfare requirements, retention policy

**Knowledge and understanding****General knowledge and understanding**

You must know:

- ways you can discuss the issues with those who cannot attend briefings and why this is important
- the areas in which you are likely to need to give support to your colleagues
- what might happen if you undermine colleagues' self-confidence when you are correcting their mistakes
- how to keep the discussions relevant to the agenda and what may happen if you do not
- how and what support you could give to your colleagues
- how to recognise a colleague in need of support
- how to instruct colleagues and demonstrate tasks clearly and correctly
- how to give constructive feedback

You must understand:

- the importance of making sure your colleagues understand what they have to do
- the importance of making sure your colleagues continue to be supported until they can achieve the standard required
- why team briefings are important to the work of your organisation
- the importance of finding a time and place that is appropriate to the briefing
- the importance of explaining the purpose of the briefing and the issues to be discussed
- why it is important for all team members to contribute and how to encourage them to do so
- the importance of achieving your objectives for the briefing
- why you should praise achievements

**Industry-specific knowledge and understanding**

You must understand:

- the importance of complying with local and UK employment law,
- the importance of staff retention to field operations

**Context-specific knowledge and understanding**

You must know:

- who else in your organisation could provide support
- organisational requirements regarding performance management, employment law, diversity policy, staff welfare requirements, retention policy

You must understand:

- any legal and organisational requirements that are relevant to any tasks you are demonstrating to colleagues and or information you give

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## Unit 611

# Contribute to business travel account management (TT25)

**Level:** 6

**Credit value:** 5

### **What is this unit about?**

This unit describes the competence required to track and supply business travel information relating to usage and costs against agreed travel policies.

It also includes assisting the individual business traveller to keep within budget, achieve best value for money and make advantageous travel arrangements.

### **Who is this unit for?**

The unit is recommended for those working with business customers.



**Outcomes of effective performance**

You must be able to:

- 1 **Maintain and supply information on business travel usage, so that:**
  - 1a. travel-related information gathered from relevant **sources** on a regular and frequent basis, using time and cost-effective methods, is reliable and current
  - 1b. travel arrangements and costs are accurately recorded and tracked against agreed current travel policies
  - 1c. cost control analysis for your customers is based on valid and accurate information
  - 1d. travel-related information and advice supplied to the relevant person(s) is accurate, current and provided promptly to assist the updating of travel policies
  - 1e. business travel usage information supplied to the relevant person(s) is accurate, in the correct format and available at the time required
  
- 2 **Assist customers to keep within travel policy, so that:**
  - 2a. the profile of the traveller established with the travel booker is accurate, complete and current
  - 2b. the requested travel arrangements are compared against the traveller's current profile and company travel policy before making any travel arrangements
  - 2c. any deviations from current policy are tactfully pointed out and the traveller is guided in gaining the necessary authorisation
  - 2d. suitable and cost effective alternative recommendations are made to enable them to keep within their budget and meet their requirements
  - 2e. travellers are aware of any current incentives that would enable them to keep within budget and or enjoy improved services
  - 2f. any infringements of travel policy are reported to the relevant person(s) following your organisation's procedures.

**Behaviours which underpin effective performance**

- Identify useful sources of information
- Build positive relationships to aid information collection
- Record information accurately and maintain confidentiality
- Deal sensitively with situations where infringements of travel policy have to be reported

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Sources:** supplier updates, Global Distribution System (GDS), Trade press, internet, intranet, organisation's or consortia's briefings

**Knowledge and understanding****Industry-specific knowledge and understanding**

You must know:

- sources of suitable information and how to access them
- where to access information on ground transport arrangements in major cities worldwide
- where to find information on the surface transportation available within different countries
- car rental terminology and abbreviations
- the main types of air and rail products and suppliers
- where to find information on available airport services
- 3-letter airport codes, 2-letter airline codes and how to encode and decode them
- where to find information on airport facilities for key gateways and transfer points
- British Citizen Passport and British Subject Passport requirements for UK departures
- visa types and where to find information on visa and passport entry requirements
- the different entry requirements for EU and non-EU passport holders to major destinations world wide
- what information to give customers to enable them to find out current mandatory and recommended health precautions
- the official grading schemes operating within countries worldwide and the differences between them
- where to find information on accommodation availability
- the consequences of misrepresentation with regard to restricted price procedures
- the relevant parts of the disability discrimination legislation and its implications when giving advice and information to travel customers
- the legal requirements for accurate quotations and record keeping
- how to identify your customers' main requirements and expectations
- how to use the Global Distribution System (GDS)
- 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 (e.g. age, endorsements), insurance including collision damage waivers, personal accident insurance and top ups
- how to provide air and rail travel costings (including supplements and reductions) and information on booking conditions (e.g. transfers, reconfirmation)
- how to calculate local times, distances and elapsed journey times
- how to apply knowledge of visa and passport requirements to individual circumstances
- how to question customers about passports and visas

You must understand:

- the purpose of business travel profiles and how they are used when arranging travel
- that the information you supply will inform the Management Information System (MIS) and the implications of supplying inaccurate information
- the need for confidentiality and the implications of the data protection legislation
- a business travel agent's main responsibilities under current industry codes of practice
- the importance of following Foreign Office advice

### Context-specific knowledge and understanding

You must know:

- when and to whom to supply information and the format in which it should be supplied
- where to access the approved profiles for travellers
- where to access travel security information
- the travel policies of your customers and how and where to access them
- when and where to obtain authorisation for travel arrangements outside policy and in short-notice situations
- your organisation's procedures relating to the sale of travel services and the importance of following them
- your organisation's requirements on preferred operators
- your organisation's policies relating to costs and the importance of containing costs
- the organisational, legal and industry codes of practice to which your agreements with customers and records must conform
- the procedure for reporting infringements of travel policy

## Unit 611

## Contribute to business travel account management (TT25)

### Evidence requirements

<b>Unit</b>	<b>TT25 Contribute to business travel account management</b>
<b>ELEMENT</b>	<b>Maintain and supply information on business travel usage</b>
What you must <b>DO</b>	The assessor may assess 1a-1e through questioning, witness testimony or other documentary evidence demonstrating competence.
<b>ELEMENT</b>	<b>Maintain travel related information</b>
What you must <b>DO</b>	The assessor must assess 1a-1e by directly observing the candidate's work.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• at least <b>four</b> from <b>sources</b><ul style="list-style-type: none"><li>a) supplier updates</li><li>b) global distribution systems (GDS)</li><li>c) trade press</li><li>d) internet</li><li>e) intranet</li><li>f) organisations or consortia's briefings</li></ul></li></ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Assist customers to keep within travel policy</b>
What you must <b>DO</b>	The assessor must assess 2a-2f by directly observing the candidate's work.

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**Level:** 6

**Credit value:** 2

**What is the unit about?**

This unit is about the competence required to develop and maintain customer profiles for travellers. Such profiles are used to guide and inform the recommendation and booking of travel arrangements for the individual concerned. They are also very valuable in the marketing of travel and tourism products and services, enabling travel trends to be spotted and customer needs and preferences to be promptly identified.

**Who is the unit for?**

The unit is recommended for anyone involved with customer contact roles and in a position to obtain customer information.

**Outcomes of effective performance**

You must be able to:

- 1 **Obtain personal travel details**, so that:
  - 1a. customer contact details are accurate and up to date
  - 1b. information on the traveller's personal travel preferences and travel document data are accurate and up to date
  - 1c. it is confirmed that any information to be used is still accurate and current prior to compiling or updating the customer's profile
  - 1d. all information is kept secure and available only to authorised people following your organisation's procedures
  
- 2 **Compile and maintain a personal travel profile**, so that:
  - 2a. Travellers personal document data is accurately recorded and updated in response to changes
  - 2b. the content of the profile is compatible with your organisation's travel offer and supplier availability
  - 2c. the profile content accurately reflects customers' requirements and preferences within the boundaries of any agreed travel policy
  - 2d. the profile is agreed with the relevant person(s) prior to inputting the information on your organisation's system
  - 2e. the profile is in the required format
  - 2f. the completed and agreed profile is securely stored following your organisation's procedures
  - 2g. the profile is made available and accessible to all authorised people

**Behaviours which underpin effective performance**

- Demonstrate a clear understanding of different customers and their real and perceived needs
- Use cost-effective, time-efficient and ethical means to gather, store and retrieve customer information
- Comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
- Brief colleagues and check their understanding
- Monitor the validity and reliability of customer information
- Check that customers' profiles are fit for purpose and adjust collection and analysis processes as necessary
- Reflect regularly on your own and others' experiences and use these to inform future action

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Contact details:** name and title, relevant address/es, telephone numbers, electronic communication details, organisation department
- **Personal travel preferences:** Seating, room type, car hire, airline, departure airport, smoking, diet, mobility requirements, visual and hearing requirements
- **Travel document data:** passport number and expiry date, nationality, visas held, vaccination certificates held and expiry dates, restricted entry endorsements, insurance details



**Knowledge and understanding****Industry-specific knowledge and understanding**

You must know:

- the benefits of travel profiling
- how and where to access detailed information on suppliers' products and services

You must understand:

- the importance of keeping files up to date and what circumstances will necessitate an update
- the importance of recording data 'right first time'
- the importance of ensuring your profiles are compatible with travel offers and supplier availability
- why it is important to check profile details and the person with whom you should agree any amends
- the need for confidentiality and the implications of the data protection legislation
- how to benefit from supplier loyalty schemes

**Context-specific knowledge and understanding**

You must know:

- the sources of personal information from within your customers' organisations
- the type, quantity and quality of personal information to collect
- the person with whom you should confirm the accuracy of data
- your customers' agreed and current travel policy
- the required format for customer profiles
- who has access to customer profiles
- how customers access and manage their own electronic profile
- your organisation's security procedures for keeping customer data safe and secure
- how to access and use your organisation's Global Distribution System (GDS)

**Context-specific knowledge and understanding (Business only)**

You must understand:

- the relationship and inter-dependency between the corporate traveller's personal profile and the business profile the traveller works for

## Unit 612 Build and maintain customers' profiles (TT26)

### Evidence requirements

Unit	TT26 Build and maintain customer profiles
<b>ELEMENT</b>	<b>Obtain personal travel details</b>
What you must <b>DO</b>	The assessor <u>must</u> assess 1b-1d by directly observing the candidate's work.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"> <li>• at least <b>four</b> from <b>contact details</b> <ul style="list-style-type: none"> <li>a) name and title</li> <li>b) relevant address/es</li> <li>c) telephone numbers</li> <li>d) electronic communication details</li> <li>e) organisation department</li> </ul> </li> <li>• at least <b>four</b> from <b>personal travel preferences</b> <ul style="list-style-type: none"> <li>a) seating</li> <li>b) room type</li> <li>c) car hire</li> <li>d) airline</li> <li>e) departure airport</li> <li>f) smoking</li> <li>g) diet</li> <li>h) mobility requirements</li> <li>i) visual and hearing requirements</li> </ul> </li> <li>• at least <b>four</b> from <b>travel document data</b> <ul style="list-style-type: none"> <li>a) passport number and expiry date</li> <li>b) nationality</li> <li>c) visa's held</li> <li>d) vaccination certificates held and expiry dates</li> <li>e) restricted entry endorsements</li> <li>f) insurance details</li> </ul> </li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Compile and maintain personal travel profiles</b>
What you must <b>DO</b>	The assessor may assess 2a-2g through questioning, witness testimony or other documentary evidence demonstrating competence.

## Unit 613

# Contribute to maintaining the quality of travel and tourism operations (TT38)

**Level:** 6

**Credit value:** 4

### **What is the unit about?**

This unit describes the competence involved in quality assuring day-to-day operations and systems, including security procedures, and maintaining the standard of products and services supplied to travel and tourism customers by external contractors. Making suitable suggestions for improvements are also included.

### **Who is the unit for?**

The unit is recommended for anyone responsible for ensuring the smooth running of tourism operations.

**Outcomes of effective performance**

You must be able to:

1. **Help maintain the quality and security of operations**, so that:
  - 1a. less experienced colleagues are aware of the standards of performance expected of them and the systems in place to measure them
  - 1b. **operations** and **security procedures** are monitored against given measures at specified intervals
  - 1c. any operational deficiencies are promptly rectified
  - 1d. agreed changes and improvements are implemented according to instructions
  - 1e. quality assurance records and reports are complete, accurate and promptly forwarded to the correct person
  
2. **Help maintain the standard of supplied products and services**, so that:
  - 2a. variations from specification in the delivery of contracted products and services are identified and the reasons for them reported to the appropriate person
  - 2b. the effects on customers of products and services being below specification are minimised, following correct procedures
  - 2c. the goodwill of external suppliers and the good image of the organisation is maintained

**Behaviours which underpin effective performance**

- Make suitable suggestions for improvements to operational systems, clearly identifying the potential benefits
- Freely share and encourage the sharing of information to keep everyone up to date and well informed
- Respond positively to any agreed changes to operational procedures and or standards of performance
- Keep the relevant people aware of any local information or events likely to adversely affect operations
- Make suitable recommendations for changes to suppliers clearly explaining the benefits changes would bring to your organisation

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Operations:** for the benefit of customers, to meet the needs of the organisation
- **Security procedures:** cash (and equivalents), staff, customers, premises, equipment, information

**Knowledge and understanding****General knowledge and understanding**

You must know:

- how to make suggestions for improvement in a constructive way

You must understand:

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

**Industry-specific knowledge and understanding**

You must know:

- the types of measures available for quality assuring on-site travel and tourism operations, security and supplier performance
- the types of supplier problems that can commonly affect customers
- how to deal with operational quality failures

**Context-specific knowledge and understanding**

You must know:

- the contractual obligations of the suppliers in the area(s) for which you are responsible
- the items in the area where you work that are classified as 'high value' and subject to special security arrangements
- any keyholders, their responsibilities and how to contact them
- your role and responsibilities for ensuring the quality of operations, maintaining security and the delivery of services by suppliers
- the standards of personal performance, service and conduct expected by your organisation
- organisational policies and procedures covering all workplace operations, security and services provided to customers
- your organisation's and local policies for sustainable tourism and how they should be implemented
- aspects of current data protection legislation relevant to the information you store and for which you are responsible
- the quality control and monitoring systems used in your organisation and how to apply them
- the type(s) of quality control records required by your organisation and how and when to complete them
- the person(s) to whom you should report any quality related problems
- how to deal with suppliers and others when things go wrong and the types of remedial action that are available to you

## Unit 613

# Contribute to maintaining the quality of travel and tourism operations (TT38)

## Evidence requirements

Unit	TT38 Contribute to maintaining the quality of travel and tourism operations
<b>ELEMENT</b>	<b>Help maintain the quality and security of operations</b>
What you must <b>DO</b>	The assessor may assess 1a-1e through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• <b>both from operations</b><ul style="list-style-type: none"><li>a) <b>for the benefit of customers</b></li><li>b) <b>to meet the needs of the organisation</b></li></ul></li><li>• at least <b>three</b> from <b>security procedures</b><ul style="list-style-type: none"><li>a) <b>cash (and equivalents)</b></li><li>b) <b>staff</b></li><li>c) <b>customers</b></li><li>d) <b>premises</b></li><li>e) <b>equipment</b></li><li>f) <b>information</b></li></ul></li></ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Help maintain the standard of supplied products and services</b>
What you must <b>DO</b>	The assessor may assess 2a-2c through questioning, witness testimony or other documentary evidence demonstrating competence.

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## Unit 614

# Organise and implement travel and tourism promotional activities (TT42)

**Level:** 6

**Credit value:** 3

### **What is the unit about?**

This unit describes the competence necessary to plan, implement and evaluate travel and tourism related promotional activities. These may be one-off local activities, part of a series of activities and/or part of a larger programme at national level that have to be organised and delivered locally.

### **Who is the unit for?**

The unit is recommended for staff involved in organising and implementing promotional activities.



**Outcomes of effective performance**

You must be able to:

1. **Plan promotional activities**, so that:
  - 1a. the aims, objective and success criteria of the promotional activity are agreed with the relevant person(s)
  - 1b. opportunities to maximise promotional activities at local or national events are identified
  - 1c. where appropriate, others are encouraged to contribute ideas for the promotional activity
  - 1d. all necessary resources for the promotional activity are identified and their availability secured
  - 1e. realistic logistics for the promotional activity are included in the plan
  - 1f. activities are planned to meet the organisation's needs, procedures and legal requirements
  - 1g. plans include contingency arrangements to take account of predictable problems
  - 1h. plans are presented in a format to suit the needs of all others involved
  - 1i. suitable arrangements are made for the evaluation of the promotional activity
2. **Implement promotional activities**, so that:
  - 2a. the promotional activity and evaluation is undertaken according to the agreed plan
  - 2b. suitable promotional resources are available and meet the quality and quantity needs of the activity
  - 2c. any problems are identified and resolved to minimise disruption
  - 2d. any necessary changes to the plan are notified to all those affected
3. **Evaluate and revise promotional activities**, so that:
  - 3a. the activities are evaluated against the planned objectives and success criteria
  - 3b. the results of the evaluation are reported promptly, clearly and accurately to the relevant person(s)
  - 3c. outcomes of the evaluation are used to inform the type, use and content of future promotional activities
  - 3d. recommendations for future activities are supported by evaluation information

**Behaviours which underpin effective performance**

- Work with others to develop and implement a plan
- Secure the support of others involved in implementing the promotional activity
- Encourage feedback from colleagues and customers

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Resources:** time, funding, people, materials, location/space, technology, media
- **Legal requirements:** health, safety, security, confidentiality, risk assessment, trade description
- **Plans:** aims, objectives, activities, resources, success criteria, transport, logistics, costing, roles and responsibilities, methods of evaluation
- **Promotional resources:** display materials, information materials, technology, media, giveaways or free gifts

**Knowledge and understanding****General knowledge and understanding**

You must know:

- the roles of promotional activities in the wider context of marketing products and services

**Industry-specific knowledge and understanding**

You must know:

- what motivates travel and tourism businesses to carry out promotional activities
- factors affecting the success of promotional activities in travel and tourism
- legislation and regulation relevant to the activity being planned and undertaken
- possible local and national events which could provide opportunities to carry out promotional activities

**Context-specific knowledge and understanding**

You must know:

- the type of promotional activities undertaken by the organisation
- how to carry out promotional activities in line with organisational procedures and objectives
- how to carry out promotional activities at local or national events
- the success criteria used by the organisation to measure the impact of promotional activities
- the features of the travel and tourism products and services to be promoted
- organisational procedures for sourcing and securing promotional resources
- the outcomes of previous promotional activities run by the organisation

## Unit 614

# Organise and implement travel and tourism promotional activities (TT42)

## Evidence requirements

Unit TT42 Organise and implement travel and tourism promotional activities

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### ELEMENT

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### Plan promotional activities

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What you must **DO**

The assessor may assess 1a-1i through questioning, witness testimony or other documentary evidence demonstrating competence.

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What you must **COVER**

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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
  - f) technology
  - g) media
  
- at least **three** from **legal requirements**
  - a) health
  - b) safety
  - c) security
  - d) confidentiality
  - e) risk assessment
  - f) trade description
  
- at least **two** from **plans**
  - a) aims
  - b) objectives
  - c) activities
  - d) resources
  - e) success criteria
  - f) transport
  - g) logistics
  - h) costing
  - i) roles and responsibilities
  - j) methods of evaluation

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

<b>ELEMENT</b>	<b>Implement promotional activities</b>
What you must <b>DO</b>	The assessor may assess 2a-2d through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"> <li>• at least <b>two</b> from <b>promotional resources</b> <ul style="list-style-type: none"> <li><b>a) display materials</b></li> <li><b>b) information materials</b></li> <li><b>c) technology</b></li> <li><b>d) media</b></li> <li><b>e) giveaways / free gifts</b></li> </ul> </li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Evaluate and revise promotional activities</b>
What you must <b>DO</b>	The assessor may assess 3a-3d through questioning, witness testimony or other documentary evidence demonstrating competence.

## Unit 615

## Generate increased travel and tourism sales (TT46)

**Level:** 6

**Credit value:** 5

### **What is the unit about?**

This unit describes the competence involved in contacting existing and potential customers to increase the level of sales of travel and tourism products and services, and evaluating your success in increasing sales.

### **Who is the unit for?**

The unit is recommended for staff engaged in direct sales of travel and tourism products.

**Outcomes of effective purpose**

You must be able to:

1. **Source contacts to increase sales, so that:**
  - 1a. sales-drive objectives, targets and evaluation methods are identified and agreed with the relevant person(s)
  - 1b. potential **sales leads** are selected according to agreed criteria
  - 1c. **products and services** potentially of interest to customers are identified
2. **Promote sales of travel and tourism products and services, so that:**
  - 2a. customers and sales leads are contacted using the most effective **methods** and times
  - 2b. products and services promoted are based on previous buying history and potential needs, opportunities for up-selling and switch-selling
  - 2c. sales techniques used are adapted and suit customer reaction
  - 2d. information provided to potential customers is valid and suited to their needs
  - 2e. **details of the customer contact** are recorded accurately
3. **Evaluate success in increasing sales, so that:**
  - 3a. valid comparisons are made between the agreed objectives and the actual sales achieved, and any variations explained
  - 3b. recommendations for future sales-drives are based on sound evaluation and promptly provided to the relevant person(s)

**Behaviours which underpin effective performance**

- Research existing customer base to identify potential leads to sales of selected products and services
- Build and maintain good relationships with new and existing customers
- Adapt approach and language used with customers in response to their reactions
- Identify opportunities for sales in the course of a conversation
- Identify “buying signals” from customers to trigger closure of the sale
- Evaluate data, draw conclusions and make recommendations for future sales-drives

**Scope**

The items below describe a variety of circumstances for which evidence may be required:

- **Sales leads:** recent customer enquiries not converted to sales, recently returned travellers, repeat customers, colleague suggestions
- **Products and services:** core products, additional products and services
- **Methods:** telephone, post
- **Details of the customer contact:** customer information, further action, sales, referrals

**Knowledge and understanding****General knowledge and understanding**

You must know:

- methods of researching a customer database to identify potential sales leads
- how to use selling techniques to make sales, including establishing rapport
- how to adapt your sales approach to meet different customers' reactions

You must understand:

- the place and value of local direct sales drives in promoting sales and identifying customers' needs
- the benefits and limitations of different means of contacting customers
- the importance of recording customers' reactions to sales offerings
- the importance of carefully listening/watching to customers' reactions during sales conversations

**Industry-specific knowledge and understanding**

You must know:

- the range of customers' needs for travel and tourism products and services
- current economic and social conditions that affect travel and tourism product purchasing
- means of evaluating the success of sales-drives
- how to effectively present information to customers to generate interest in products and services
- how to recognise opportunities to up-sell and switch-sell

You must understand:

- the influence of current conditions on customers' reactions to travel and tourism sales-drives
- the importance of providing only accurate and relevant information to potential customers

**Context-specific knowledge and understanding**

You must know:

- the range, features and prices of all available travel and tourism products and services
- current promotional deals and sales objectives
- the main products and services being offered by competitors
- to whom you can refer customer contacts and from whom you can obtain further information and advice that may be needed

# Unit 615      Generate increased travel and tourism sales (TT46)

## Evidence requirements

Unit	TT46 Generate increased travel and tourism sales
<b>ELEMENT</b>	<b>Source contacts to increase potential sales</b>
What you must <b>DO</b>	The assessor may assess 1a-1c through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"> <li>• at least <b>two</b> from <b>sales leads</b> <ul style="list-style-type: none"> <li><b>a) recent customer enquiries not converted to sales</b></li> <li><b>b) recently returned travellers</b></li> <li><b>c) repeat customers</b></li> <li><b>d) colleague suggestions</b></li> </ul> </li> <li>• at least <b>one</b> from <b>products and services</b> <ul style="list-style-type: none"> <li><b>a) core products</b></li> <li><b>b) additional products and services</b></li> </ul> </li> <li>• at least <b>one</b> from <b>methods</b> <ul style="list-style-type: none"> <li><b>a) telephone</b></li> <li><b>b) post</b></li> <li><b>c) email</b></li> </ul> </li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
<b>ELEMENT</b>	<b>Promote sales of travel and tourism products and services</b>
What you must <b>DO</b>	The assessor may assess 2a-2e through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"> <li>• at least <b>two</b> from <b>details of customer contact</b> <ul style="list-style-type: none"> <li><b>a) customer information</b></li> <li><b>b) further action</b></li> <li><b>c) sales</b></li> <li><b>d) referrals</b></li> </ul> </li> </ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>



**ELEMENT****Evaluate success in increasing sales**

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What you must **DO**

The assessor may assess 3a & 3b through questioning, witness testimony or other documentary evidence demonstrating competence.

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**Level:** 6

**Credit value:** 4

**What is the unit about?**

Business objectives and targets are applied in all industries to establish a framework, against which the performance of the business and its staff can be compared. It is vital to be aware of areas in which effort towards improvement is needed, in order that resources can be most effectively deployed.

**Who is the unit for?**

The unit is recommended for those responsible for monitoring or reporting business performance. These will generally be managers but may involve other staff in collecting data and some analysis.

### Outcomes of effective performance

You must be able to:

**Monitor business performance**, so that:

- 1a. key business **targets and performance indicators** are identified
- 1b. relevant business records are accurate and up-to-date
- 1c. the causes of significant variations between planned and actual performance are investigated
- 1d. colleagues are encouraged to make suggestions for improving business performance
- 1e. viable plans for improving business performance are developed

### Behaviours which underpin effective performance

- Carry out monitoring efficiently to minimise disruption
- Careful analysis of performance data
- Involve colleagues in identifying possible causes of significant variations

### Scope

The items below describe a variety of circumstances for which evidence may be required:

1. **Targets and performance indicators:** sales, costs, service provision

**Knowledge and understanding****General knowledge and understanding**

You must know:

2. how to keep accurate and up-to-date records
3. how to analyse business performance data

You must understand:

- factors that can affect the performance of a business
- means of presenting ideas for measures to improve business performance

**Industry-specific knowledge and understanding**

You must know:

- how to identify key indicators by which business performance might be judged
- current market conditions in the industry and their possible effects on business performance

You must understand:

- possible factors that may cause variations between target performance and that achieved
- the importance of involving staff in the collections and analysis of performance data

**Context-specific knowledge and understanding**

You must know:

- current operational features in the organisation
- how frequently you need to check actual business performance to obtain reliable data
- current local market conditions and possible effects on business performance
- the consequences of possible changes in operational processes
- the activities of your colleagues and the effects that they may have on business performance
- what information on business performance you need to provide to others
- any required presentation formats for business performance information
- the availability of resources needed to implement possible improvements

# Unit 616      Monitor business performance (TT50)

## Evidence requirements

Unit	TT50 Monitor business performance
ELEMENT	Monitor and improve business performance
What you must <b>DO</b>	The assessor may assess 1 a-1 e through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must <b>COVER</b>	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"><li>• at least <b>one</b> from <b>targets and performance indicators</b><ul style="list-style-type: none"><li><b>a) sales</b></li><li><b>b) costs</b></li><li><b>c) service provision</b></li></ul></li></ul> <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>

**Level:** 6

**Credit value:** 4

**What is the unit about?**

This standard is about initiating and moderating a social network as a method of promoting travel and tourism products and services to customers and for gathering information.

Comments posted by customers on social networking sites can impact on the organisation almost instantly and so need to be monitored carefully and dealt with promptly.

**Outcomes of effective performance**

You must be able to:

1. take into account the access points and devices that customers will use to gain access to the social network
2. use the social network to promote all of the markets in which the business operates
3. ensure the social network operates in a way that is consistent with the brand values of the business
4. promote the benefits of the social network to colleagues
5. encourage colleagues to suggest ideas for discussion topics
6. choose online discussion topics that are likely to help the business achieve its objectives and targets
7. initiate and contribute to online discussions at times when doing so will best support the objectives and targets of the business
8. monitor the social network sufficiently closely to allow effective moderation
9. moderate discussions in accordance with the agreed rules
10. ensure that all the content which you contribute to the network is in line with your organisation's social networking policy, is factually accurate, up-to-date, legally compliant and, where necessary, authorised by colleagues
11. alert colleagues to customers' comments where these are relevant to those colleagues' responsibilities
12. keep up-to-date with trends and technological developments relating to social networking

**Scope**

- a) **Access points and devices** – These may include for example: computer monitors, mobile phones, kiosks, television screens
- b) **Brand values**: The core values and qualities that define the business from the customer's viewpoint
- c) **Colleagues**: Those who work in any of the following: your team, the same area of the business, other areas of the business



**Knowledge and understanding**

You need to know and understand:

1. legal and your organisation's requirements relating to maintaining a social network as part of travel and tourism, and their impact for your work
2. your organisation's social networking policy
3. the access points and devices currently available to customers and the implications of each of these for a social network
4. which parts of your organisation's business could benefit from or contribute to the success of the social network
5. the brand values of the business
6. the currently accepted conventions of social networking and how these are evolving
7. how using social networking is expected to help your organisation's business to achieve its objectives and targets
8. the rules under which the network(s) operates
9. your role as moderator in ensuring discussions stay within the rules
10. how to recognise when to intervene in discussions
11. where to find accurate, up-to-date information about the products and services offered by the business
12. which colleagues can authorise content for the social network
13. sources of up-to-date information about trends and technological developments relating to social networking

## Unit 623

# Advise and coach customers in-store/centre on the use of online facilities (TT53)

**Level:** 6  
**Credit value:** 7

### What is the unit about?

This standard is about advising and helping customers in the use of the web-based facilities available to them within your store or centre. This includes their use of, for example, tablets, pods and mobile apps, and how customers can use these to browse and research products and services, to check product and service availability, to book or purchase products and services, and where appropriate, to pay for their purchases.

In helping, or coaching, customers in the use of the web-based facilities you will need to demonstrate the online processes in a manner which promotes understanding and which is sensitive to different customers' existing understanding and attitude to online technology.

**Outcomes of effective performance**

You must be able to:

1. operate all aspects of your organisation's relevant in-store/centre web-based research and selling facilities correctly and with confidence
2. determine customers' needs in accessing the web-based facilities and their level of understanding regarding how to use the facilities
3. promote the use of your organisation's web-based facilities with enthusiasm, relating their features and benefits to the relevant needs of your customers
4. determine and explain clearly and correctly the use of the web-based facilities in meeting your customers' needs
5. determine and explain the use of the facilities in a manner which promotes understanding and which is appropriate to your customers' existing appreciation and attitude to the technology being demonstrated
6. encourage customers to ask questions, check for understanding, and respond in ways that promote sales and goodwill
7. encourage customers to operate the web-based facilities as appropriate to their learning needs and level of confidence
8. seek feedback from customers upon their experience of using your organisation's web-based facilities and respond appropriately
9. use the feedback constructively in informing the relevant person regarding positive comments and any aspects for enhancement

### Knowledge and understanding

You need to know and understand:

1. how to operate the range of web-based research and selling facilities available in-store/centre within your organisation, including any mobile apps
2. the features of the web-based research and selling facilities and their associated benefits, both to your customers and to your organisation
3. the impact of multi-channel retailing upon in-store/centre selling within your organisation, including its impact for your customers' ability to research and order products from your organisation and its competitors
4. the importance of achieving a balance between demonstration, instruction and customers' own activity in operating the facilities, as appropriate to customers' levels of expertise, attitude and confidence
5. how customers learn and develop their skills in using the web-based technology
6. different learning styles and their impact for coaching customers on the use of online facilities
7. your organisation's practices and requirements relating to advising and coaching customers on the use of web-based facilities

## Unit 701

# Develop and sustain collaborative relationships with other organisations (TT55)

**Level:** 7

**Credit value:** 5

### **What is the unit about?**

This unit is about developing and sustaining collaborative relationships with other organisations which share objectives that are similar or complementary to your own organisation's objectives.

This standard is relevant to managers and leaders who are the main point of contact with external organisations and are responsible for ensuring effective relationships with them.

This standard links closely with all the other standards in key area DD Build and sustain relationships.

**Outcomes of effective performance**

You must be able to:

1. Identify organisations which share common or complementary objectives and evaluate the feasibility of collaboration in line with your organisation's strategic objectives.
2. Decide whether to collaborate with other organisations, based on an evaluation of potential benefits, the compatibility of the organisations and your ability to mitigate any risks involved.
3. Seek to create a climate of trust and mutual respect, particularly where you have no authority, or shared authority, over those you are working with.
4. Agree internally and with the other organisations:
  - 4.1. the aims and objectives of collaboration
  - 4.2. the benefits each organisation expects from collaboration
  - 4.3. the costs to each organisation from collaboration
  - 4.4. the actions each organisation will take and when
  - 4.5. the required outcomes from collaboration
  - 4.6. the risks involved in the collaboration and how these will be managed
  - 4.7. arrangements for communicating with each other and reporting progress
  - 4.8. arrangements for processing information in line with relevant legislation
  - 4.9. how and when you will review the effectiveness of your collaboration.
5. Take agreed actions at the agreed time; inform the other organisations if you are unable to do so and the reasons for this.
6. Seek to understand difficult situations and issues from the other organisations' perspective and provide support, where necessary, to move things forward.
7. Report to, and receive reports from, the other organisations according to arrangements agreed.
8. Provide feedback to the other organisations in ways that help them to perform effectively and reinforce their commitment and enthusiasm for collaboration.
9. Process information supplied by the other organisations in line with arrangements and relevant legislation
10. Review the effectiveness of your collaboration at agreed times and agree:
  - 10.1 the extent to which the aims and objectives have been achieved
  - 10.2 the actions carried out by each organisation, any deviations from the actions agreed and reasons for these
  - 10.3 any failures or mistakes, the reasons for these and ways of avoiding these failures or mistakes in the future
  - 10.4 the costs to each organisation of collaboration and ways in which these costs may be reduced in the future
  - 10.5 the benefits to each organisation, the value of these benefits and how mutual benefits may be increased in the future
  - 10.6 the extent to which the expectations of each organisation have been met
  - 10.7 any changes to make your collaboration more effective in the future.

**Knowledge and understanding****General knowledge and understanding**

You need to know and understand:

1. The importance of identifying and evaluating potential organisations with which to collaborate.
2. How to identify the potential benefits to each party of collaboration.
3. How to identify the aims, values and working practices of other organisations and assess how compatible these are with your organisation's aims, values and working practices.
4. How to identify the potential costs, in terms of money, time and resources, to each organisation of working together.
5. The importance of agreeing with partners the benefits and costs to each organisation of working together.
6. The importance of basing your decision to collaborate with other organisations on your evaluation of potential benefits, the compatibility of the organisations and your ability to mitigate any risks involved, and how to do so.
7. The importance of identifying and agreeing with other organisations the aims and objectives of collaboration, and how to do so.
8. The importance of identifying and agreeing the actions each organisation will take and when, and how to do so.
9. The importance of identifying and agreeing the arrangements for communicating with each other and reporting progress, and how to do so.
10. How to identify and evaluate any risks involved in working together.
11. The importance of identifying and agreeing how and when you will review the collaboration and its effectiveness, and how to do so.
12. The importance of taking agreed actions at the agreed time and informing people promptly if you are unable to do so and the reasons for this.
13. The importance of supporting collaborating organisations to take their agreed actions at the agreed time, and how to do so.
14. The importance of reporting and receiving reports from collaborating organisations according to arrangements agreed, and how to do so.
15. How to provide feedback to collaborating organisations in ways that help them to perform effectively and reinforce their commitment and enthusiasm for collaboration.
16. How to process information supplied by collaborating organisations in line with arrangements and data protection legislation.
17. The principles of effective communication and how to apply them.

**Industry-specific knowledge and understanding**

You need to know and understand:

18. Industry/sector requirements and legislation for collaboration with other organisations to achieve common or complementary objectives.

**Context-specific knowledge and understanding**

You need to know and understand:

19. Your organisation's aims, values and working practices.
20. Legal and organisational requirements for data protection.
21. Confidentiality policies for each organisation and how they may impact on the collaboration.
22. Who has a right to the information and knowledge you are communicating.

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## 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:

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

NQF NVQ units		SVQ units	
Unit Number/Title		Unit Number/Title	
Unit 202	Ensure your own actions reduce risks to health and safety	Unit 502	Make sure your own actions reduce risks to health and safety
Unit 214	Process travel services bookings	Unit 512	Process travel services bookings
Unit 301	Organise your work and personal development	Unit 603	Organise your work and personal development
Unit 302	Improve the customer relationship		
Unit 303	Sell travel services	Unit 607	Sell travel-related products and services
Unit 304	Sell tailor made travel services	Unit 608	Sell tailor made travel services
Unit 305	Sell multi sector air travel	Unit 609	Sell multi sector air travel
Unit 306	Develop and maintain supportive relationships with telephone callers		
Unit 307	Analyse, evaluate and present tourism data	Unit 617	Analyse, evaluate and present tourism data
Unit 308	Contribute to supporting and developing colleagues	Unit 610	Contribute to supporting and developing colleagues
Unit 309	Monitor and solve customer service problems	Unit 602	Monitor and solve customer service problems
Unit 310	Contribute to business travel account management	Unit 611	Contribute to business travel account management

Unit 311	Build personal business traveller profiles	Unit 612	Build and maintain customers' profiles
Unit 312	Contribute to maintaining the quality of travel and tourism operations	Unit 613	Contribute to maintaining the quality of travel and tourism operations
Unit 313	Organise and implement travel and tourism promotional activities	Unit 614	Organise and implement travel and tourism promotional activities
Unit 314	Generate increased travel and tourism sales	Unit 615	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 601	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 618	Deal with travel and tourism problems and emergencies
Unit 322	Research and develop tour itineraries	Unit 619	Research and develop tour itineraries
Unit 323	Plan and deliver on site entertainment	Unit 620	Plan and deliver on site entertainment
Unit 324	Research, plan and develop interpretative commentaries		
Unit 325	Manage the delivery of a tour	Unit 621	Manage the delivery of a tour
Unit 326	Complete foreign exchange transactions	Unit 604	Complete foreign exchange transactions
		Unit 513	Build and maintain relationships with customers not present
		Unit 605	Obtain and analyse customer feedback
		Unit 616	Monitor business performance
		Unit 606	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:

- a) The centre and qualification approval process and forms
- b) Assessment, verification and examination roles at the centre
- c) Registration and certification of candidates
- d) Non-compliance
- e) Complaints and appeals
- f) Equal opportunities
- g) Data protection
- h) 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
- a) ***Events***  
Contains dates and information on the latest Centre events
- ***Online assessment***  
Contains information on how to register for GOLLA assessments.

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

## Useful contacts

Type	Contact	Query
UK learners	T: +44 0844 543 0000 E: learnersupport@cityandguilds.com	a) General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com	a) General qualification information
Centres	T: +44 (0)20 7294 2787 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com	b) Exam entries c) Registrations/enrolment d) Certificates e) Invoices f) Missing or late exam materials g) Nominal roll reports h) Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	i) Exam entries j) Results k) Certification l) Missing or late exam materials m) Incorrect exam papers n) Forms request (BB, results entry) o) Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	p) Results q) Entries r) Enrolments s) Invoices t) Missing or late exam materials u) Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	v) Re-issue of password or username w) Technical problems x) Entries y) Results z) GOLLA aa) Navigation bb) User/menu option problems
Employer	T: +44 (0)121 503 8993 E: business_unit@cityandguilds.com	cc) Employer solutions dd) Mapping ee) Accreditation ff) Development Skills gg) Consultancy
Publications	T: +44 (0)20 7294 2850 F: +44 (0)20 7294 3387	hh) Logbooks ii) Centre documents jj) Forms kk) Free literature

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