

Travel Consultant Apprenticeship (9056-12)

February 2024 Version 2.1

End-point Assessment Pack

For Centres/End-Point Assessment Customers/Employers

Version and date	Change detail	Section
V1.1 August	Time scale for submission of the 'My Journey' Log updated.	Assessment – Professional Discussion - Task instruction for centres/employers
V2.0 November 2018	Grading details updated	Section 3 – Determining the apprenticeship grade
	Task instructions updated to add further clarity for centres and apprentices around the expectation of the My Journey Log (Showcase Portfolio) and how to use the standard and appendix 1.	Task instructions for Centres/Employers
	Showcase portfolio checklist added	
	Task instructions for the Professional Discussion updated	Task instructions for apprentices
	Outcomes and elements numbered	Appendix 1 My Journey Log – How you may evidence the learning outcomes
	Example evidence and mapping reference for My Journey Log added	Appendix 2
V2.1 February 2024	Amended guidance on re-sits and retakes	Section 3

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1 Introduction

About this Apprenticeship Occupation

Travel consultants have a highly responsible role as they provide outstanding customer service, delivering a range of often complex travel arrangements, accommodation bookings and ancillary services which help to ensure their travellers benefit from journeys and time at their destination that is positive and aims to exceed their expectations. Usually travel consultants specialise in either 'corporate' or 'leisure' travel but either way employers agree that their essential knowledge, skills and behaviours are transferable across the industry.

Corporate travel consultants typically work according to service level agreements, taking care of the unique needs of business travellers, and know how to tailor itineraries that ease their door-to-door experience, taking account of factors that may impact on their trip including location and times, business facilities and corporate budgets. A key part of a corporate travel consultant's role is appreciating that their customer must account for every single expense when travelling for business, and so must ensure travel time is organised and used as effectively as possible, and in compliance with the customer's corporate policy or preferred choices.

Leisure travel consultants work in a fast paced, customer focused sales environment which aims to sell experiences and memories and meet the unique needs of leisure customers by sourcing and matching them to a variety of travel options within their budget including: tailor made itineraries, package holidays, special interest holidays, weddings abroad, cruises and seasonal activity based holidays. A key part of a leisure consultant's role is keeping ahead of the ever-increasing demand from customers for new and different leisure experiences.

What is in this document

- The occupation standard
- Resource requirements for end-point assessment
- Timeline for end-point assessment
- End assessment tasks and guidance on grading
- Guidance for the independent end-point assessor
- Guidance for the centre/employer
- Guidance for the apprentice

This document must be used alongside the **End-point Assessment Handbook** and the **End-point Assessment Recording Forms for Independent End-point Assessors** documents.

End-points assessments

The focus of the end-point assessment (EPA) is for the candidate to fully demonstrate the values, knowledge, skills and behaviours set out in the apprenticeship standard and to be able to demonstrate this level of professional competence in authentic workplace contexts.

Apprentices will be asked to complete a number of EPAs to conclude their apprenticeship. The EPA is formal summative assessment that concludes the apprenticeship programme and is assessed in a number of ways to provide a clear indication of the candidate's knowledge and skills. These methods of EPA will be:

- Knowledge Test

- Professional Discussion.

This pack contains specific guidance around the assessments of the specific occupation, for an overview summary of all assessment methods that could be used as part of EPA please see the Independent End-point Assessor Manual.

Grading

This apprenticeship is graded Pass, Merit, Distinction. EPAs will be assessed and graded by City & Guilds Independent End-point Assessors (IEPA), more information about how each assessment is graded and how the overall apprenticeship grade is determined can be found in later sections of this document.

Entry requirements for end-point assessment

To be eligible for EPA the apprentice must have been on programme for a minimum of 12 months and successfully achieved the following:

- Completed the on-programme 'My Journey' log and formal meeting with line manager and on programme assessor or senior manager.
- Apprentices will also have achieved Level 2 Mathematics and Level 2 English qualifications (or relevant equivalent) either during or before their apprenticeship.

Gateway – prior to end-point assessment

When all on-programme content has been completed, the employer and provider are required to sign-off the apprentice as being ready to undertake the EPA. In order to do this, they will be required to submit a **City & Guilds EPA Gateway Declaration form**. This confirms that the apprentice has acquired the required knowledge, skills and behaviours, along with any mandatory qualifications. Each occupation has a specific Gateway Declaration form, a copy of this form for this occupation can be found in the appendices of this document.

Completed Gateway Declaration forms are submitted to City & Guilds as part of the booking process and are checked by the EPA team, prior to the allocation of an IEPA to undertake the assessments.

Remote Assessment

Remote assessment is live assessment that is supported by technology where the IEPA and the apprentice are not in the same physical location when the assessment takes place

The following assessments can be conducted remotely

- Professional discussion

For more detailed information around the conditions and requirements that must be met for remote assessment please refer to the IEPA Manual

Security, confidentiality & copyright of end-point assessment materials (centres)

Additional conditions of use City & Guilds End-point Assessment Materials are protected by copyright and are supplied only to Approved Centres for use solely for the purpose of summative assessment.

The following conditions, which apply to City & Guilds End-point Assessment Materials, are additional to

- **the Standard Copying Conditions** which can be found at <http://www.cityandguilds.com/142.html>; and
- (where the City & Guilds End-point Assessment Materials are dated examinations), the JCQ Instructions for Conducting Examinations.

The tutor/employer must:

- only use the City & Guilds End-point Assessment Materials in formal, summative end-point assessment leading to the award of an apprenticeship and not for any other purpose (including, but not restricted to, teaching, revision, as practice assessments or for commercial purposes) · handle and store securely the City & Guilds End-point Assessment Materials in accordance with the following conditions
- City & Guilds End-point Assessment Materials must be accessible to apprentices only during formal end-point assessment as governed by the assessment conditions specified for the individual apprenticeship;
- The portfolio of the apprentice may contain assessment results referenced to the assessment taken but should not contain the City & Guilds End-point Assessment Materials (such as assessment tasks or questions or marked scripts if the tests may be reused (unless otherwise stated));
- The content of any City & Guilds End-point Assessment Materials must not be made public in any format, either in part or in full;
- City & Guilds End-point Assessment Materials must be securely handled and under no circumstances shared with third party organisations or individuals seek written permission from City & Guilds if they want to convert City & Guilds End-point Assessment Material for storage, retrieval and delivery in electronic form (ie using some form of e-assessment or e-learning system) · provide access, on request, to City & Guilds to the system(s) on which the End-point Assessment Materials appear.

2 Apprenticeship Occupational Standard

	Industry knowledge and understanding (Know it)	Industry skills (Show it)	Industry behaviours (Live it)
Geography	Know a varied range of world-wide geography and popular travel destinations to help inform customers' travel plans	Source and provide reliable and relevant geographical information that will help inform enquiries, support customers' travel decisions and close sales	Proactively keep up to date with worldwide geography and current affairs that could impact on customers
Travel information	Know travel information including: passport and visa requirements, diversity for example local cultures, customs and tradition, differences in time zones, climate, medical safety information, foreign office advice and foreign exchange information	Source and provide accurate and relevant travel information that will ensure customers have a positive travel experience	Proactively keep up to date with travel information according to the customer profile of the business and the ever changing dynamics of the industry
Industry practice	Know the travel industry and the systems that support it, including those for reservations and booking, the importance of booking the correct product / service and key information such as travel terminology, abbreviated industry codes, preferred operators' current fare and ticketing rules, and travel regulations	Carry out transactions, using a range of reservation and booking systems, according to standard industry practices and the procedures of the business, ensuring that customers are offered travel options that will meet their individual needs within agreed deadlines	Take a keen interest in travel industry developments to keep professional knowledge current and up to date
Travel options	Know the variety and alternative combination of travel options that are available to customers including modes of transportation, types of accommodation and how to produce an itinerary that will meet customers' precise needs	Source travel options, work with relevant industry suppliers and produce detailed itineraries that best meet customers' needs	Demonstrate commercial awareness and consideration for customers' unique needs when selecting and combining different elements of customers' travel plans
Product and service	Know the unique selling points of travel products and services and understand how to match their features to benefit the customer and provide an enhanced competitive proposition	Match customer needs to products and services and identify opportunities to upsell, suggest alternatives, introduce an enhanced competitive offer when appropriate and always aim to maximise profit when closing the sale	Promote confidence in customers by demonstrating a passion and belief in the products and services being sold
Customer	Know different customer profiles, including sole travellers and groups, how to recognise and identify their requirements and individual needs, their preferred method(s) of booking travel, the need for providing a flexible service to support the process, and how to meet the increasing demand for an enhanced travel experience	Engage customers by building rapport and take opportunities to adapt communication styles to match their needs and deliver an enhanced service which encourages repeat business and consistently aims to exceed their expectations	Respond positively and imaginatively to customers' requirements, demonstrating an enthusiasm to inspire and delight them
Legal and compliance	Know how to keep customers' details safely and to lawfully process business transactions, recognising the connection with travel industry regulations, business compliance and relevant legislation	Conduct the business transaction in compliance with travel industry regulations, approved codes of practice and business policy and continuously monitor the process to ensure accurate information and advice is given to customers	Be diligent in upholding protocols and business reputation to ensure customers receive the best quality service and advice and communicate and explain emerging issues and updates

Industry technology	Know how to utilise technology in line with customer and business requirements and the scope of technology used within the business and the industry as a whole	Use technology effectively and efficiently and input data accurately in accordance with business procedures	Use technology responsibly and embrace developments in travel technology
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	Generic knowledge and understanding (Know it)	Generic skills (Show it)	Generic behaviours (Live it)
Business	Know the business vision, objectives and brand standards, the market it competes in, external factors that affect customer behaviour and business performance and understand the importance of meeting customers' needs profitably	Actively support business performance by meeting agreed targets and providing travel solutions for customers varying needs and budgets in a way that is profitable to the business	Engage with the culture and ethos of the business and be a positive advocate and driver for high quality performance and achievement
Sales	Know how to operate commercially with the aim of exceeding sales target, how to calculate complex travel costings, understanding the difference between turnover and profit, and how own targets contribute to achieving the overall sales budget	Achieve and exceed commercial targets by applying selling techniques that are appropriate to all customer types, take opportunities to maximise sales for example by selling promotions and preferred supplier programmes and maximise financial performance by upselling, cross-selling and calculating fares and refunds accurately	Proactively seek ways of engaging customers to increase and enhance sales
Team and personal performance	Know and understand the factors that both motivate and impair individual and team performance and recognise how own and team dynamics impact on the experience of the customer and ultimately business success	Work constructively with team members to deliver travel plans and experiences that meet customer needs and recognise opportunities for self and team development to improve performance	Evaluate own personal performance in a consistently positive and professional manner, take on feedback and welcome personal development opportunities
Communication	Understand how to professionally communicate to different audiences using a variety of methods, including available digital resources	Select and use appropriate methods of communication including digital technologies according to the customer and the nature of the travel details being conveyed, ensuring quotes and prices are presented accurately	Be clear and coherent to effectively communicate accurate and complex information professionally and confidently to a diverse audience, in line with business expectations
Sustainability	Understand the impact that the business activity has on the environment and the organisation's approach to operate in a more responsible and sustainable manner	Adapt working practices to minimise the negative effect on the environment	Demonstrate an on-going commitment to reducing impact on the environment in all work activities

3 End-point assessment guidance for Centres/Employers

Introducing the end-point assessment to the apprentice

Employers/training providers should make the apprentice aware of the different assessment methods that make up the end-point assessment (EPA) of the apprenticeship prior to the gateway process.

While EPAs will be assessed by the Independent End-point Assessor (IEPA), in this apprenticeship for the following assessment methods it is the responsibility of the employer/training provider to introduce the assessments to the apprentice ahead of the IEPA visit.

- 9056-300/301 End-point Assessment –Knowledge Test
- My Journey Log (Showcase Portfolio)
- 9056- 700/750/701/751 Professional Discussion

Further information around what can be shared and the timelines around this can be found in the **Task Instructions for Centres/Employers** sections within this document. When introducing any assessments a realistic timeframe should be set for completion of each task, in line with the timeline agreed with City & Guilds when booking EPA. If tasks are not completed within the agreed timeframe without the apprentice having a good reason, the timeline for any IEPA visit may be reviewed.

Health and safety / Codes of practice

The importance of safe working practices, the demands of the Health and Safety at Work Act and any Codes of Practice associated with the industry **must** always be adhered to.

The requirement to follow safe working practices is an integral part of all City & Guilds assessments, and it is the responsibility of the tutor/employer/EPA venue to ensure that all relevant health and safety requirements are in place when working on any projects or before apprentices begin any practical assessment.

Should an IEPA identify something, when assessing evidence submitted for the apprenticeship or pick up on something during an oral assessment that indicates that health and safety practices and procedures may not have been adhered to, they will feed this back to City & Guilds EPA team.

Authenticating the apprentices work

When making judgements on evidence of unobserved tasks, the independent end-point assessor must ensure all decision satisfy VACS. For evidence produced outside controlled conditions the apprentice will be required to

- sign a declaration that the work is their own
- reference all sources.

The centre/employer can also aid authentication by:

- supplementary (oral) questioning to gauge familiarity with the topic
- looking out for any changes to the apprentices usual writing style, unusual sources/examples or the use of e.g. US spellings or phrases that might indicate cutting and pasting from the internet
- requiring access to evidence of steps in the process e.g. drafts, notes, planning etc.

For further information on authenticating work, see: www.ofqual.gov.uk/plagiarism-teachers

City & Guilds have produced evidence reference forms that include a declaration of authenticity form, these must be completed when submitting evidence and can be found in the EPA recording forms for EPA customers/employers/training provider's document. These should be completed and signed by both the tutor/employer and the apprentice.

Recording forms

City & Guilds have designed specific recording forms for apprentices and centres / EPA customers / employers / training providers to use for this apprenticeship.

These can be found in **End-Point Assessment Recording Forms for Centres/End-point Assessment Customers/Employers/Training Providers** document.

Centres must use the forms provided by City & Guilds in the format laid out in this document.

Determining the overall apprenticeship grade

The overall grade for the apprenticeship will be calculated based on a sum of the apprentices' achievement across the assessment components, and taking into account the assessments' weighting.

All assessments must be achieved at a minimum of pass for the apprenticeship to be achieved. The contribution of the assessments towards the apprenticeship grade is as follows:

Assessment method	Grade scale	% contribution
Knowledge test (300/301, 350/351)	X/P/M/D	55%
Professional Discussion (700/701, 750/751)	X/P/M/D	45%

Each assessment will be graded individually and each result converted into points. The points available for each assessment grade are listed in the table below.

	Fail	Pass	Merit	Distinction
Knowledge test (55%)	0	4	6	8
Professional Discussion (45%)	0	4	6	8

The points will then be multiplied by the weighting for each assessment and these figures are then added together, and the overall grade determined using the following apprenticeship grade boundaries.

Apprenticeship Grade	Points
Distinction	8
Merit	6
Pass	4
Fail	0-3

Feedback

The IEPA will not provide any feedback to the apprentice during or immediately following the EPA process. Feedback (if given) will only be provided to fail apprentices, following submission of evidence to City & Guilds and after any grade determination has been carried out.

Results submission and Certification

The City & Guilds IEPA will submit the apprentice results to City & Guilds. City & Guilds will issue the End Assessment record of achievement confirming the grade achieved and will notify the appropriate body who will issue the Apprenticeship certificate.

Opportunities to resit or improve results for a task

If the apprentice fails one assessment method or more, they can take a re-sit or a re-take at their employer's discretion. The apprentice's employer needs to agree that a re-sit or re-take is appropriate. A re-sit does not need further learning, whereas a re-take does. The apprentice should have a supportive action plan to prepare for a re-sit or a re-take.

Re-sits and re-takes are not offered to an apprentice wishing to move from pass to a higher grade. The apprentice will get a maximum EPA grade of pass if they need to re-sit or re-take one or more assessment methods, unless the EPAO determines there are exceptional circumstances.

The employer and the EPAO should agree the timescale for a re-sit or re-take. The timescale for a re-take is dependent on how much re-training is required. No limit has been set for the number of retakes an apprentice can take. Should an apprentice fail both activities, within the same EPA 'window', a period of further training and development lasting between one and three months is recommended.

The fundamental aim is to ensure that the apprentice has reached the required standard, is fully prepared and confident before undertaking their EPA. It is vital that standards are up-held by employers and EPA organisations.

4 End-point Assessment Resources List

Resource required	
Online test	Suitable IT systems for evolve as outlined in the manual for end-point assessment services
	An invigilator
	A quiet room with adequate lighting, space and privacy. It must be away from the pressures of work activities, in a controlled environment. This may be on or off the employers' premises.
Professional discussion	A suitable room for the professional discussion/interview to take place, large enough to accommodate all those involved including panel member where applicable
	Seating area or room for any other apprentices to wait
	Access to water and cups
	Where applicable, internet access and suitable equipment for remote assessment as outlined in the manual for end-point assessment services

5 End-point assessment timeline

	Activity
On-going prior to completion (a minimum of 12 month period on-programme).	<p>Employer</p> <ul style="list-style-type: none"> reviews progress and ensures Apprentices performance is on track as part of the regular performance management system. <p>Apprentice</p> <ul style="list-style-type: none"> Completed level 2 Maths and English if applicable. Completes their On-programme My Journey Log.
Gateway.	<p>Line manager/tutor</p> <ul style="list-style-type: none"> Formal meeting held between the apprentice and line, manager and on programme assessor and/or senior manager to review the apprentices' 'My Journey' log. Complete 'Readiness for independent end assessment record'. Prior to independent end-point assessment the apprentice must complete the English and Maths components of the Apprenticeship. Gateway declaration form and Readiness for independent End Assessment – Travel Consultant Record sent to City & Guilds EPA team.
Book end-point assessment (Professional Discussion) in line with City & Guilds booking timelines.	<p>Employer/training provider</p> <ul style="list-style-type: none"> Makes End-point Assessment booking with City & Guilds Submits reservation request 500 or 501.
Completion of knowledge examination (prior to the Professional Discussion).	<p>Apprentice and Training Provider/Employer</p> <ul style="list-style-type: none"> Book online knowledge examination Apprentice must sit and pass the online knowledge examination prior to Professional Discussion.
My Journey log and evidence reference form	<ul style="list-style-type: none"> Centre submits Apprentice's My Journey Log and evidence reference form to City & Guilds EPA team at least 10 working days prior to Professional Discussion.
On-Programme discussion topics.	<ul style="list-style-type: none"> IEPA submits Apprentice On-programme Discussion Topics to Apprentice at least 5 working days prior to Professional Discussion.
End-point assessment visit.	<p>The Employer, Apprentice and IEPA</p> <ul style="list-style-type: none"> Plan and carry out the Professional Discussion.

My Journey Log (Showcase Portfolio)

Task instructions for centres/end-point assessment customers

Guidance on submitting evidence in a My Journey Log (Showcase Portfolio)

The My Journey Log (Showcase Portfolio) is a showcase of the apprentice's best pieces of evidence, a concise collection of evidence selected from the breadth of available evidence. It efficiently demonstrates the apprentice's performance in relation to the specified outcomes of the standard, and showcases their highest quality work.

The My Journey Log (Showcase Portfolio) is **not** directly assessed by the City & Guilds independent end-point assessor (IEPA), but is used as the basis for the Professional Discussion. The IEPA uses it to familiarise themselves with the apprentice's work in preparation for the Professional Discussion, and the apprentice can use it to provide tangible evidence, backing-up their accounts of their work during the Professional Discussion.

The My Journey Log (Showcase Portfolio) **must** cover all outcomes (show it and live it) of the standard (see section 2 of the End-point Assessment pack for Centres/Employers/Training Providers). Appendix 1 – My Journey Log – How you may evidence the learning outcomes shows the outcomes that must be covered and then underneath these are the elements which support understanding and interpretation of each of these outcomes. My Journey Log (Showcase Portfolio) does **not** need to cover every element listed in appendix 1, instead the evidence selected should showcase how the apprentice has covered all outcomes.

The task instructions for apprentice, the standard and Appendix 1 must be shared with the apprentice to support them preparing their My Journey Log (Showcase Portfolio).

Types of evidence

Ideally the evidence should be produced in electronic format, or scanned/ photographed to give a clear electronic representation, as it must be submitted electronically for End-point Assessment (EPA).

The evidence in the My Journey Log (Showcase Portfolio) must be chosen to provide valid evidence for the specified outcomes of the standard being assessed. It can be for example:

- Products – for instance:
 - Electronic documents such as letters, memos, reports, itineraries, call recording, copies of client briefs and bookings made, performance reviews, development plans, feedback etc.
- Observation evidence – a statement from a suitably qualified person (eg tutor) describing the apprentice's performance in the workplace while carrying out naturally occurring activities.
- Reflective account – an account from the apprentice providing evidence of their thinking eg their considerations of processes used; reasons for decisions made; evaluations and suggested improvements to future practice.
- Witness testimony – evidence from a relevant witness giving their account of what the apprentice has done in their job role. The witness can range from a manager to a customer.

All evidence must be of the apprentice's own work and, for any team work, must clarify and focus only on their contribution.

Where necessary, confidentiality and data protection requirements must be adhered to eg permissions for use of video/images containing identifiable 3rd parties (eg clients), anonymising of documentation and permissions obtained from clients when submitting documents relating to them.

Selecting Evidence

All evidence should follow the synoptic approach, i.e. not concentrate on ticking individual outcomes/elements, but showing an overview of the process. For example, a travel itinerary with an evaluation and reflective account could cover outcomes/elements 1.1, 1.2, 2.1, 3.1, 4.1, 4.2, 5.1, 6.1, 7.1 and 10.2. Not all elements under each outcome have to be covered by one piece of evidence, other sources of evidence may cover these and/or the other outcomes. For an example of one piece of evidence covering multiple outcomes see Appendix 2.

Before selecting the evidence to form the portfolio, the apprentice should review the assessment requirements stated in the standard:

- the outcomes and elements to be covered by the portfolio
- the type of evidence that can be presented (see above)
- the amount of evidence that should be presented
- the period of time from which the evidence should have originated (usually this will be towards the end of the apprenticeship).

To assemble the portfolio, the apprentice should consider all the evidence they have available that shows they have met the outcomes being assessed. Evidence collected towards the end of their apprenticeship programme, as they become independent in their work, is likely to provide the most holistic evidence – ie covering a number of outcomes/elements at once. From this, they should select evidence that **most efficiently** meets all the relevant outcomes and which demonstrates their **best performance**. While there may be some overlap between the evidence collected, multiple pieces of evidence showing coverage of the same outcome should not normally be submitted for EPA. See worked example in Appendix 2.

There are two questions that an apprentice should consider when selecting work to form their portfolio:

- Which pieces holistically (most efficiently) give evidence that together cover all of the relevant outcomes?
- Is this the **best** evidence I have, showing that I have met all of the requirements for the higher grade?

Confirming the evidence selection

When the apprentice has selected the evidence to form their portfolio, this must be reviewed by the employer/training provider to ensure:

- all assessment requirements have been sufficiently met and referenced to the evidence reference form
- it is in line with any requirements relating to the type and amount of evidence required and when the evidence should have originated;
- there is no unnecessary duplication of evidence against the same element;
- the work selected represents the best evidence available in relation to grading requirements;

- the clarity of any images or scanned evidence is sufficient to determine the quality of the original evidence;
- authenticity of evidence has been established.

Timings

The EPA My Journey Log (Showcase Portfolio) must be submitted to the City & Guilds EPA team at least 10 working days prior to the Professional Discussion taking place.

Preparing evidence for submission

Evidence being uploaded for EPA must be presented as follows:

- evidence must have a header on the front page containing the name and handwritten/e-signature of the apprentice together with the date the evidence was produced; (if you submit all evidence in one document, it is acceptable to only sign once, however each piece of evidence within the document still needs to be dated individually)
- each piece of evidence must be referenced to the outcome it is being submitted against, either on a reference matrix or within the header;
- along with the City & Guilds evidence reference form (found in the **EPA recording forms for Centres /End-point Assessment customers/Employers/Training Providers** document) completed to:
 - cross-reference each outcome to the relevant piece of evidence
 - formally declare the authenticity of all evidence.

City & Guilds have created a 'Showcase portfolio checklist' to help apprentices and centres ensure that all relevant information is accounted for.

My Journey Log (Showcase portfolio) checklist		Tick when confirmed
1.	Is all evidence signed by the apprentice and dated? * E-signatures are also acceptable	
2.	Is all evidence valid, authentic, current and sufficient (VACS)?	
3.	Does evidence clearly show it is the apprentice's individual work (and if involved in team work is it clear the specific contribution the apprentice made)?	
4.	Does the evidence clearly demonstrate their relevant knowledge?	
5.	Have you used the evidence reference form? And has all evidence been referenced?	
6.	Does it showcase the apprentice's best pieces of work?	
7.	Is the majority of the evidence holistic in its nature?	
8.	Have you checked that you have not included any pieces of evidence that are duplicated or not relevant?	
9.	Are any witness testimonies or employer references tailored to the apprentice?	
10.	Has any client/customer reference information been anonymised?	
11.	Have all external sources of information being appropriately documented and referenced to the original source, showing clear understanding of how they relate to the criteria?	
12.	Has the appropriate stakeholder(s) eg employer/training provider checked whether the apprentice's portfolio meets all the required criteria and grading descriptors?	

Reminder: You **must** upload the completed evidence reference form to the EPA portal in word format

* where witness testimonies are included as a piece of evidence these do not need to be signed by the apprentice but instead must be signed/authenticated as outlined in the rest of the EPA pack

My Journey Log (Showcase Portfolio)

Task instructions for apprentice

Guidance on submitting evidence in a My Journey Log (Showcase Portfolio)

Your My Journey Log (Showcase Portfolio) is a showcase of your best pieces of evidence, a concise collection of evidence selected from the breadth of available evidence. It should efficiently demonstrate your performance in relation to the specified outcomes of the standard, and showcases your highest quality work.

Your My Journey Log (Showcase Portfolio) is **not** directly assessed by the City & Guilds Independent End-point Assessor (IEPA), but is used as the basis for Professional Discussion. The IEPA will review your My Journey Log (Showcase Portfolio) and evidence review form and will use these to inform you of the topics that they would like you to cover in the Professional Discussion. You will be notified of these topics at least five working days prior to the Professional Discussion taking place. For further details on this process see the task instruction for the Professional Discussion.

Your My Journey Log (Showcase Portfolio) will cover all outcomes (show it and live it) of the standard. Your Training Provider/Employer will share the standard with you as well as the table entitled 'My Journey Log – How you may evidence the learning outcomes' which shows the outcomes that must be covered and the elements that may evidence these outcomes.

Types of evidence

The evidence in the Showcase Portfolio must be chosen to provide valid evidence for the specified outcomes being assessed. It can be for example:

- Products – for instance
 - Electronic documents such as letters, memos, reports, itineraries, call recording, copies of client briefs and bookings made, performance reviews, personal development plans and feedback.
- Observation evidence – a statement from a suitably qualified person (eg tutor) describing your performance in the workplace while carrying out naturally occurring activities.
- Reflective account – an account providing evidence of your thinking eg your considerations of processes used; reasons for decisions made; evaluations and suggested improvements to future practice.
- Witness testimony – evidence from a relevant witness giving their account of what you have done in your job role. The witness can range from a manager to a customer.

All evidence must be of your own work and, for any team work, must clarify and focus only on your contribution.

Selecting Evidence

There are two questions that you should consider when selecting work to form your portfolio:

- Which pieces holistically (most efficiently) give evidence that together cover all of the relevant outcomes?
- Is this the **best** evidence I have, showing that I have met all of the requirements for the higher grade?

Confirming the evidence selection

When you have selected the evidence to form your portfolio, this must be reviewed by your employer/training provider.

Preparing evidence for submission

You will be instructed by your employer/training provider on how the evidence should be presented ready for submission.

Recording forms

All recording forms can be found in **Assessment pack recording form** document that is available in a word format. Please see below summary of the recording forms that are available for this apprenticeship.

Recording form	Purpose	Who should complete	Where Can it be found
Gateway declaration form	To confirm that the apprentice is ready for EPA	Training provider/employer	9056-12 EPA Recording forms for training providers and centres
My Journey evidence reference form	To reference the evidence in the Showcase Portfolio to the standard.	Training provider/employer/IEPA	9056-12 EPA Recording forms for training providers and centres

Assessment 300/350 End-point Assessment – Knowledge Test (Leisure)

Assessment specification

Assessment type: Multiple Choice Questions delivered online*

Assessment conditions: Invigilated examination conditions, the apprentice is allowed to bring the following publications into the examination:

- Columbus World Travel Atlas
- Columbus Tourist Attractions and Events of the World

Grading: D/M/P/X

Exam 300/350	Duration: 2 hours, 5 minutes		
Standard ref.	Criteria	Number of marks	%
Geography	Names and locations of worldwide destinations	28	40%
	How to read maps to identify the location of the major airports, destinations, major cities and country groups		
	The names and locations of continents, countries, capitals, resorts, gateway airports and seaports (major cruising ports), major towns, cities, tourist attractions, oceans and seas, main physical features		
	The names and locations of UK towns, cities, gateway airports and seaports		
	The names and locations of UK regions and resorts, national parks		
	Letter airport codes and how to encode them		
	The location of major tourist attractions and special events in the UK, Europe and throughout the world		
Travel information	Travel information	10	15%
	Passport and visa requirements information		
	Diversity information		
	Time zones and climate information		
	Medical safety information		
	Foreign office advice and information		
	Foreign exchange information		
Legal and Compliance	Know how to keep customers' details safely	11	15%
	Business compliance		

	Travel industry regulations		
	Relevant legislation		
	Lawfully process business transactions		
Travel options	Transport options		
	Accommodation options	7	10%
	How to produce an itinerary that will meet the customers precise needs		
Customer	Know different customer profiles		
	How to recognise and identify requirements and individual needs, their preferred methods of booking travel	7	10%
	The need for providing a flexible service		
	How to meet the increasing demand for an enhanced travel experience		
Industry practice	Know the travel industry and systems that support it		
	Travel terminology abbreviated industry codes	4	5%
	Operators' current fare and ticketing rules		
Business	The market it competes in		
	External factors that affect customer behaviour and business performance	3	5%
Sustainability	The impact that the business has on the environment		

*These exams are sat under invigilated examination conditions, as defined by the JCQ: <http://www.jcq.org.uk/exams-office/ice---instructions-for-conducting-examinations>.

Entry for exams can be made through the City & Guilds Walled Garden.

Assessment specification

Assessment type: Multiple Choice Questions delivered online*

Assessment conditions: Invigilated examination conditions, the apprentice is allowed to bring the following publications into the examination:

- Columbus World Travel Atlas
- Columbus Tourist Attractions and Events of the World

Grading: D/M/P/X

Exam 301/351		Duration: 2 hours, 5 minutes	
Standard ref.	Criteria	Number of marks	%
Geography	Names and locations of worldwide destinations	28	40%
	How to read maps to identify the location of the major airports, destinations, major cities and country groups		
	The names and locations of continents, countries, capitals, resorts, gateway airports and seaports (major cruising ports), major towns, cities, tourist attractions, oceans and seas, main physical features		
	The names and locations of UK towns, cities, gateway airports and seaports		
	The names and locations of UK regions and resorts, national parks		
	Letter airport codes and how to encode them		
	The location of major tourist attractions and special events in the UK, Europe and throughout the world		
Travel information	Travel information	10	15%
	Passport and visa requirements information		
	Diversity information		
	Time zones and climate information		
	Medical safety information		
	Foreign office advice and information		
	Foreign exchange information		
Legal and Compliance	Know how to keep customers’ details safely	11	15%
	Business compliance		
	Relevant legislation		

	Lawfully process business transactions		
Travel options	Transport options	7	10%
	Accommodation options		
Customer	Know different customer profiles	7	10%
	How to recognise and identify requirements and individual needs, their preferred methods of booking travel		
	The need for providing a flexible service		
	How to meet the increasing demand for an enhanced travel experience		
Industry practice	Know the travel industry and systems that support it	4	5%
	Travel terminology abbreviated industry codes		
	Operators' current fare and ticketing rules		
Business	The market it competes in	3	5%
	External factors that affect customer behaviour and business performance		
Sustainability	The impact that the business has on the environment		

*These exams are sat under invigilated examination conditions, as defined by the JCQ:
<http://www.jcq.org.uk/exams-office/ice---instructions-for-conducting-examinations>.

Entry for exams can be made through the City & Guilds Walled Garden.

Assessment 300/301, 350/351 Knowledge test

Task instructions for Centres/Employers

Training providers/employers are advised to prepare apprentices for the test by:

- Sharing the 9056-300 or 301 assessment specifications as well as the Travel Consultant Trailblazer Standards in section 2 of this document
- Encouraging apprentices to sit the sample multiple choice paper under invigilated exam conditions available on the 9056 webpage

The Geography element of the test assessment specification has been broken down to support centres with apprentices who may fail their first attempt and therefore have to re-sit the test.

Apprentices are allowed to take the following publications into the examination:

- Columbus World Travel Atlas
- Columbus Tourist Attractions and Events of the World

The knowledge test can be taken at any time during the end-point assessment phase, but must be passed before taking the professional discussion assessment.

Assessment specification

For full content of coverage please see Appendix 3.

Component	Description	Coverage	Grading
700/750	Professional discussion (Leisure/Corporate)	Geography	P/M/D/X
		Travel information	
		Industry practice	
		Travel options	
		Products and services	
		Customers	
		Legal and compliance	
		Industry technology	
		Business	
		Sales	
		Team and personal performance	
		Communication	
		Sustainability	

Assessment 700/701, 750/751 Professional discussion

Task instructions for Centres/Employers

The professional discussion is a 1-2 hour structured discussion which must be 'learner led' and structured to involve the apprentice, employer and the City & Guilds independent end-point assessor (IEPA) and must be designed to draw out the best of the apprentice's energy, enthusiasm, capabilities and excellence.

Centres/Employers should ensure that the apprentice is familiar with the grading criteria for the Professional Discussion.

The discussion should be divided into four stages:

- Summary of performance
- On-programme assessment evidence (My Journey Log)
- Coverage of the standard
- Personal development and reflection

Employer panel member

An employer representative is allowed to be present during the professional discussion, however if there is no employer, the assessment can still proceed.

Ideally the employer panel member is the same person that conducted the initial meeting with the apprentice prior to the gateway process, normally their line manager or senior manager. If this person cannot attend, it should be someone that is senior to the apprentice and is familiar with their work. The employer panel member can support the apprentice and confirm information but they cannot ask questions or contribute to grading.

Panel members must be willing and able to give of their time without interruption during the End Point Assessment (EPA).

The centre/EPA customer must make sure that panel members are aware of their role in the assessment and the expectations of what they are doing prior to the assessment. Panel members should also be familiar with the task instructions that have been given to the apprentice and any grading criteria for the assessment.

Panel members are required to arrive at the venue not less than 30 minutes before the assessment begins. This gives time for the panel members to meet the IEPA and go over any briefing needed.

The panel member will be expected to take part in the professional discussion by supporting the apprentice and confirming information but they cannot ask questions or contribute to grading. The employer panel member will also be expected to complete the City & Guilds recording form that will be provided to them by the IEPA. Completed forms must be given to the IEPA at the end of the assessment.

The IEPA has the final say over the outcomes of the assessment decisions made and will communicate the results to City & Guilds who will quality assure these.

The assessment environment

The Professional Discussion will be conducted in a controlled environment such as a quiet room, away from the normal place of work. Centres/Employers are responsible for making these arrangements, the required resources needed can be found in the End-point Assessment Resources section of the End-point Assessment pack for Centres/Employers. However, the assessment may take place remotely if necessary.

Please refer to the Manual for End-point Assessments and the Remote Assessment section for details of requirements.

Preparation for assessment

The apprentice's 'My Journey' Log (Showcase Portfolio) and evidence reference form must be submitted to City & Guilds via the EPA portal at least 10 working days prior to the EPA. The log must be endorsed and validated by the employer using the **Declaration of Authenticity Form**.

The IEPA will review the apprentices' My Journey log (Showcase Portfolio) and evidence reference form. The IEPA will complete the **EPA – On-programme Discussion Topics** form and submit this via the EPA portal at least 5 working days prior to the EPA.

The apprentice will use the topics highlighted in this form to prepare a structured discussion for their On-programme assessment evidence section of the Professional Discussion. This ensures that the professional discussion is learner led. The apprentice may bring materials to assist them to demonstrate their competence, and may also refer to their My Journey Log in order to bring examples to life and to clarify understanding.

Undertaking the assessment

Following introductions and summary of the purpose and structure of the professional discussion by the IEPA the professional discussion will commence.

1. Apprentice summary of performance (5 minutes)

After introductions the apprentice will be invited to give a five minute summary of how they feel they have performed during their apprenticeship. Their summary should include the highlights and lowlights and what key lessons they consider they have learnt.

2. On-programme assessment evidence (minimum of 25 minutes)

The apprentice will be asked to talk through the discussion topics that have been highlighted by the IEPA in the **EPA – On-programme Discussion Points** form to clarify further understanding and enable them to further showcase their skills and knowledge. The apprentice may bring materials to assist them to demonstrate their competence, they may also refer to their My Journey Log (Showcase Portfolio).

3. Coverage of the standard (minimum of 25 minutes)

The IEPA will have prepared further questions to ensure full coverage of the standard, these questions will not have been shared with the apprentice prior to the assessment however they are designed to support and enhance the discussion.

4. Personal development and reflection (10 minutes)

The personal development section of the professional discussion is an opportunity for the apprentice to sum up how their journey as an apprentice has developed their personal skills and knowledge and to highlight what they would like to do in the future to continue your development. Centres/Employers should encourage the apprentice to prepare for this personal development and reflection section prior to the Professional Discussion taking place.

Conclusion of the Professional Discussion

The IEPA will inform the apprentice that the Professional Discussion is coming to a close. The apprentice will be given the opportunity to add anything further that they feel they have not had the opportunity to mention as well as any questions they might like to ask.

Grading the professional discussion

The IEPA will use the grading descriptors, found in the grading criteria section of the IEPA assessment pack, to determine the grade for the Professional Discussion. The overall grade descriptors for each theme outline what the apprentice must do to achieve the grade for each theme, these are shown in bold

in the grey sections. The criteria underneath further expands on the descriptors to support determining the appropriate grade.

All pass criteria must be met in order for the apprentice to pass the EPA. The IEPA, alone, will determine the final grade given for the Professional Discussion.

Assessment 700/701, 750/751 Professional discussion

Task instructions for apprentice

Overview of task

The professional discussion is a 1-2 hour structured discussion which must be led by you. It will involve yourself, your employer and a City & Guilds independent end-point assessor (IEPA), however if there is no employer, the assessment can still proceed.

The discussion will be divided into four stages:

- Summary of performance
- On-programme assessment evidence (My Journey Log)
- Coverage of the standard
- Personal development and reflection.

Preparation for assessment

At least five working days before your Professional Discussion takes place you will be informed of the topics that you will be expected to discuss with the IEPA during the On-programme assessment evidence section of your Professional Discussion. Using these topics you will formulate a structured discussion that further demonstrates your competence and abilities. You may bring materials to assist with demonstrating your competence and personal development and reflection and may also refer to your My Journey Log (Showcase Portfolio) in order to bring examples to life and clarify understanding.

Undertaking the assessment

Following introductions and summary of the purpose and structure of the professional discussion by the IEPA the professional discussion will commence.

1. Apprentice summary of performance (5 minutes)

You will be invited to give a five minute summary of how you feel you have performed during your apprenticeship. This summary should include the highlights and lowlights and what key lessons you feel you have learnt on your journey.

2. On-programme assessment evidence (minimum of 25 minutes)

The IEPA will ask you to talk through the discussion points that have been highlighted to clarify further understanding and enable you to further showcase your skills and knowledge. You may bring materials to assist you in demonstrating your competence and you can also refer to their My Journey Log (Showcase Portfolio).

3. Coverage of the standard (minimum of 25 minutes)

For this section the IEPA will have prepared further questions to ensure full coverage of the standard, these questions will not have been shared with you prior to the assessment however they are designed to support and enhance your discussion.

4. Personal development and reflection (10 minutes)

The personal development section of the professional discussion is an opportunity for you to sum up how your journey as an apprentice has developed your personal skills and what you would like to do in the future to continue your development.

Conclusion

The IEPA will inform you that the Professional Discussion is coming to a close. You will be given the opportunity to add anything that you feel you have not had the opportunity to mention as well any questions you might like to ask.

Assessment outcome

The professional discussion will be judged by both your employer and the IEPA but the IEPA will make the final decision on the grade achieved for the outcome of the professional discussion.

Assessment 700/701, 750/751 End-point Assessment – Professional Discussion

Grading descriptors

Descriptors			
Theme	Pass (1 point) The apprentice will competently perform their role demonstrating application of the knowledge, skills and behaviours set in the standard in line with company and regulatory requirements and ensuring customer satisfaction.	Merit (2 points) The apprentice, in addition to meeting the pass criteria, will demonstrate confidence and self-motivation in their role will look for opportunities for self-development, deal with problems as they arise and seek to exceed customer expectations in line with business objectives.	Distinction (3 points) The apprentice, in addition to meeting the pass and merit criteria, will consistently perform above the required level for the role, have excellent self and time management skills, seek and take opportunities to share knowledge and develop others when the opportunity arises and deliver excellent customer experiences within the confines of the travel consultancy.
Customer Service	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> articulate different customer profiles including how to recognise and identify customer requirements and how to deliver an enhanced travel experience provide examples of building rapport and adapting communication styles to match customer needs show an understanding of the importance of customer service to encourage repeat business demonstrate an enthusiasm to inspire and delight customers at all times. 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> clearly articulate their flexible approach to providing bespoke customer service to suit a range of personality types and requirements beyond the expectations of the customer profile provide examples of taking a varied approach to enhancing customer travel experience and is demonstrably proactive in gaining repeat business demonstrate a passion and belief in the products and services being sold. 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> clearly articulate strategies for negotiating with unhappy customers and is able to provide examples of independently finding resolutions within their level of authority provide examples of taking accountability for monitoring customer satisfaction and reacting to feedback.
Communication	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> articulate how to professionally communicate with different audiences using a variety of methods. provide examples of selecting and using appropriate methods of communication 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> articulate their adaptable approach to communication, to suit different situations. provide examples of adjusting tone of communication as appropriate. 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> articulate strategies for moving communication forward to a satisfactory outcome for all parties.

	<p>according to the customer and the nature of the travel details being conveyed.</p> <ul style="list-style-type: none"> • show an understanding of the importance of ensuring quotes and prices are presented accurately. • provide examples of communicating complex information to meet customer needs and of ensuring understanding. 	<ul style="list-style-type: none"> • provide examples of situations where their listening and questioning techniques identified additional requirements. 	
Understanding	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> • articulate the unique selling points of the main travel products and services for their organisation and demonstrates an understanding of how to match their features to benefit the customer. • describe sources that will provide information to inform customers' travel decisions however these may be limited. Identifies the scope of travel information required by customers. • articulate the characteristics of a travel itinerary. • describe how to keep customers' details safely and the implications of not following industry regulation and legal requirements. • describe the business vision, objectives and brand standards of own organisation. • describe common external factors that affect customer behaviour and business performance of own organisation. • articulate how to operate commercially and how own targets contribute to achieving the overall sales budget. • show an understanding of sustainability in relation to immediate working environment and own role. 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> • articulate the unique selling points of a broad range of the travel products and services for their organisation. Shows a clear understanding of the requirement to use preferred suppliers. • provide examples of a wide range of sources, and shows proactivity in seeking new and reliable sources of information that will enhance the advice they can provide to customers. • articulate the additional characteristics of a travel itinerary that will enhance customer experience. • describe situations where specialist expertise and information may be required and provides examples of sources that will cater to this request. • describe a comprehensive range of external factors that may affect the travel industry as a whole. 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> • articulate a detailed understanding of the benefit of using preferred suppliers and balancing the needs of the customer with that of the organisation. • show a clear understanding of the implications of not using reliable sources when providing information. • describe own organisation's responses to the main external factors that may affect customers.

Industry skills	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> • provide examples of carrying out different types of transactions using a range of reservation and booking systems • source travel options, work with relevant industry suppliers and produce itineraries that meet customer needs • provide examples of matching customer needs to products and services and identify opportunities to maximise profit when closing the sale • provide examples of achieving commercial targets by applying selling techniques. 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> • provide examples of sourcing a range of travel options to provide customers with alternative choices and guidance on making an informed decision • produce itineraries that exceed customer needs • provide examples of exceeding commercial targets on occasion by applying selling techniques. 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> • provide examples of influencing customers to making an informed decision that also balances the needs of the business • provide examples of consistently exceeding commercial targets by applying selling techniques.
Working practice	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> • articulate the factors that both motivate and impair performance. • Recognise how own working style and team dynamics impact on the experience of the customers and ultimately business success. • provide examples of working constructively with team members to deliver travel plans and experiences • recognise opportunities for self and team development to improve performance • provide examples of evaluating personal performance, taking on feedback and welcoming personal development opportunities • articulate the importance of conducting business transaction in compliance with travel industry regulations, approved codes of practice and business policy. 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> • articulate a self-awareness of own working style and motivators • provide examples of flexing own approach accordingly with colleagues • provide examples of acting on feedback and proactively seeking development opportunities to enhance own personal development. 	<p>The apprentice is able to:</p> <ul style="list-style-type: none"> • provide examples of proactively seeking feedback on own performance and of the team and of influencing and supporting colleagues to improve. • articulates a proactive approach in seeking development opportunities for the team and opportunities for sharing best practice.

7 Appendices

Appendix 1

My Journey Log – How you may evidence the learning outcomes

My journey log is not graded and is used to inform the Professional discussion.

Coverage

01 Geography

- 1.1 Source and provide reliable and relevant geographical information that will help inform enquiries, support, customers' travel decisions and close sales.
 - 1.1.1 Reliable sources of information are used to meet customers' requirements
 - 1.1.2 Communicate complex geographical information clearly
 - 1.1.3 All geographical information provided to customers is accurate and up to date
- 1.2 Proactively keep up to date with worldwide geography and current affairs that could impact on customers.
 - 1.2.1 Support customers to make informed decisions about purchases using geographical knowledge
 - 1.2.2 Use knowledge and awareness of travel geography to establish the confidence of customers

02 Travel information

- 2.1 Source and provide accurate and relevant travel information that will ensure customers have a positive travel experience.
 - 2.1.1 Use reliable sources of information
 - 2.1.2 Customers are clear about any implications arising from their query and receive accurate and complete information to resolve it
 - 2.1.3 Answer customers' questions correctly
 - 2.1.4 Provide customers with relevant, complete, accurate and up to date information and advice
 - 2.1.5 Customers are satisfied with your service

03 Industry practice

- 3.1 Carry out transactions, using a range of reservation and booking systems, according to standard industry practices and the procedures of the business, ensuring that customers are offered travel options that will meet their individual needs within agreed deadlines.
 - 3.1.1 Appropriate booking systems are used correctly, safely and securely
 - 3.1.2 Information is recorded accurately and confidentiality is maintained
 - 3.1.3 Use your organisation's relevant web-based research and selling facilities correctly and with confidence (Leisure only)
 - 3.1.4 Promote the use of web-based facilities with enthusiasm, relating their features and benefits to the relevant needs of your customers
 - 3.1.5 Customer information is recorded, processed and stored to meet the organisation's procedures and legal requirements
 - 3.1.6 The booking/administration is completed promptly and correctly to meet your organisation's procedures and other legal and regulatory requirements
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Coverage

04 Travel options

- 4.1 Source travel options, work with relevant industry suppliers and produce detailed itineraries that best meet customers' needs.
- 4.1.1 Customers are presented with a range of clearly presented and accurate travel options
 - 4.1.2 Customers have all possible options made available to them to best meet their expectations and enhance their travel experience
 - 4.1.3 Travel components from a range of suitable suppliers are identified (Corporate only)
 - 4.1.4 Produce travel itineraries and costings likely to meet your customers' expectations
 - 4.1.5 Manage customer expectations around limitations
 - 4.1.6 Customers are presented with suitable alternatives where proposals do not specifically match their original requirements
 - 4.1.7 Realistic itineraries are drafted based on all available information
 - 4.1.8 Itineraries and prices are presented clearly and accurately
- 4.2 Demonstrate considerations for customers' unique needs when selecting and combining different elements of customers' travel plans.
- 4.2.1 Select the most profitable options to suit your organisation
 - 4.2.2 Present your proposals in a way that helps customers' understanding, creates goodwill and promotes a positive image of yourself and your organisation

05 Products and services

- 5.1 Match customer needs to products and services and identify opportunities to upsell, suggest alternatives, introduce an enhanced competitive offer when appropriate and always aim to maximise profit when closing the sale.
- 5.1.1 Travel products that best match the customer's needs are identified and offered
 - 5.1.2 The features of travel product and services that accurately match the customer's needs are clearly explained and understanding is confirmed
 - 5.1.3 Customers are given opportunities to fully discuss and explore features and benefits
 - 5.1.4 Customers have options made available to them to best meet their expectations and enhance their travel experience
 - 5.1.5 Additional requirements of the customer are identified
 - 5.1.6 Benefits are promoted clearly, accurately and in a way which generates further interest from the customer
 - 5.1.7 Specific features and benefits which match or exceed your customers' requirements are highlighted
 - 5.1.8 Opportunities are identified and used for selling extra tourism products and services at a suitable time in the discussion with customers
 - 5.1.9 Customers are offered alternatives relevant to their request
 - 5.1.10 Extra travel products and services are identified and sold effectively

06 Customer

- 6.1 Engage customers by building rapport and take opportunities to adapt communication styles to match their needs and deliver an enhanced service which encourages repeat business and consistently aims to exceed their expectations.

Coverage

- 6.1.1 recognise how customers are feeling and establish a rapport with them
- 6.1.2 speak to customers clearly and put them at their ease
- 6.1.3 recognise that each customer is different and treat them as individuals
- 6.1.4 show customers respect and reliability at all times and in all circumstances
- 6.1.5 greet customers in a polite and positive manner, responding when a customer wants or needs assistance
- 6.1.6 identify and confirm customer expectations
- 6.1.7 keep customers informed and reassured
- 6.1.8 adapt communication style and behaviour
- 6.1.9 check with your customer that you have fully understood their expectations
- 6.1.10 allow your customer time to consider your response and give further explanation when appropriate
- 6.1.11 recognise information that your customer might find complicated and check whether they fully understand
- 6.1.12 explain clearly to your customers any reasons why their expectations cannot be met
- 6.1.13 identify options that will give added value to your customer service
- 6.1.14 ensure that your customer is aware of the added value of your actions
- 6.1.15 secure customer consent to proceed with agreed courses of action
- 6.1.16 Inform customers promptly of any changes to bookings and the financial and other implications of the change
- 6.1.17 share customer feedback
- 6.1.18 benefits are promoted clearly, accurately and in a way which generates further interest from the customer
- 6.1.19 Take action to encourage repeat business (Leisure only)
- 6.1.20 information on the traveler's travel preferences and travel document data are updated
- 6.2 Respond positively and imaginatively to customers' requirements, demonstrating an enthusiasm to inspire and delight them.
 - 6.2.1 Present your proposals in a way that helps customers' understanding,
 - 6.2.2 creates goodwill and promotes a positive image of yourself and your organisation
 - 6.2.3 Take opportunities to promote new and different possibilities to enhance customers' experiences
 - 6.2.4 Find alternative ways to help your customers further, when the information you give does not meet their expectations

07 Legal and compliance

- 7.1 Conduct the business transaction in compliance with travel industry regulations, approved codes of practice and business policy and continuously monitor the process to ensure accurate information and advice is given to customers.
 - 7.1.1 Relevant terms, conditions and legal requirements relating to the sale are described clearly
 - 7.1.2 The sale meets your organisation's procedures and legal requirements
 - 7.1.3 Customers' information is recorded accurately and confidentiality is maintained
 - 7.1.4 The organisation's policies and procedures are followed regarding payment discrepancies, transaction values, and limits

Coverage

- 7.1.5 Payments are stored securely and protected
- 7.1.6 Comply with health and safety legislation and organisational procedures in your workplace
- 7.1.7 Your organisation's till audit requirements are complied with (Leisure only)
- 7.1.8 Booking information and documentation is stored securely following your organisation's procedures and legal requirements
- 7.1.9 Escalate customer service issues in line with organisational procedures
- 7.1.10 Social networking activities are in line with organisational policies and legally compliant
- 7.2 Be diligent in upholding protocols and business reputation to ensure customers receive the best quality service and advice and communicate and explain emerging issues and updates.
 - 7.2.1 Record customers' information accurately and maintain adequate confidentiality
 - 7.2.2 Promote travel products and services in accordance with your organisation's policies and procedures
 - 7.2.3 Comply with legislation, travel industry regulations, approved codes of practice and your organisation's policies and procedures to ensure best quality service and advise when selling travel-related products and services
 - 7.2.4 Monitor the validity and reliability of information gathered

08 Industry Technology

- 8.1 Use technology effectively and efficiently and input data accurately in accordance with business procedures.
 - 8.1.1 Keep up-to-date with trends and developments relating to technology
 - 8.1.2 Appropriate systems are used correctly, safely and securely
 - 8.1.3 Check data input for accuracy
 - 8.1.4 Operate all aspects of your organisation's web-based research and selling facilities
 - 8.1.5 Promote the use of your organisation's web-based facilities with enthusiasm, relating their features and benefits to the relevant needs of your customers.

09 Business

- 9.1 Actively support business performance by meeting agreed targets and providing travel solutions for customers varying needs and budgets in a way that is profitable to the business.
 - 9.1.1 Your own contribution to business success is accurately identified and discussed with the relevant person.
 - 9.1.2 Developments and trends in business and wider travel and tourism services industry are regularly reviewed.
 - 9.1.3 Work targets are worked towards and met
 - 9.1.4 Personal presentation and behaviour meets organisational standards
 - 9.1.5 Your organisation's sales objectives are met through proposals put to customers.
 - 9.1.6 Prioritise opportunities and be aware of threats to your organisation's potential income and profitability

10 Sales

- 10.1 Achieve and exceed commercial targets by applying selling techniques that are appropriate to all customer types, take opportunities to maximise sales for example by selling promotions and

Coverage

preferred supplier programmes and maximise financial performance by upselling, cross-selling and calculating fares and refunds accurately.

- 10.1.1 Customers are presented with a range of clearly presented and accurate travel options
- 10.1.2 Customers' needs have been understood, summarised and confirmed through the use of appropriate questioning techniques and effective listening
- 10.1.3 Customers have all possible options made available to them to best meet their expectations and enhance their travel experience
- 10.1.4 Benefits are promoted clearly, accurately and in a way which generates further interest from the customer
- 10.1.5 Customers' objections are dealt with positively
- 10.1.6 Customers are given opportunities to fully discuss and explore features and benefits
- 10.1.7 Buying signals are correctly interpreted and acted upon
- 10.1.8 Customers' confidence is built and retained
- 10.1.9 The customer is made aware of any promotions
- 10.1.10 Extra travel products and services are identified and sold effectively
- 10.1.11 Encourage the sale of preferred supplier products and services
- 10.1.12 Customers are aware of the cost breakdown of chosen services and the final total amount to be paid
- 10.1.13 Calculate charges and refunds accurately
- 10.1.14 Take opportunities to upsell and cross sell to maximise sales and profit
- 10.1.15 Customers are aware of the cost breakdown of chosen services where client contract permits
- 10.2 Proactively seek ways of engaging customers to increase and enhance sales.
 - 10.2.1 Demonstrate a clear understanding and awareness of the range of different customers and their needs
 - 10.2.2 Take opportunities to promote new and different possibilities to enhance customers' experiences

11 Team and personal performance

- 11.1 Work constructively with team members to deliver travel plans and experiences that meet customer needs and recognise opportunities for self and team development to improve performance.
 - 11.1.1 Use sources of expert advice within the organisation
 - 11.1.2 Any misunderstandings with your colleagues are promptly resolved
 - 11.1.3 Contact you have with colleagues is friendly, helpful and respectful
 - 11.1.4 Your own strengths and weaknesses are accurately identified and discussed with the relevant person
 - 11.1.5 Your own contribution to business success is accurately identified and discussed with the relevant person
 - 11.1.6 Realistic work targets are agreed with the relevant person and progress regularly reviewed
 - 11.1.7 Your personal development plan is regularly reviewed and updated
 - 11.1.8 Ways of working together to achieve objectives are agreed
 - 11.1.9 Necessary help and information from colleagues is politely requested
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Coverage

- 11.1.10 The needs of others are anticipated and assistance is promptly offered within your capabilities
- 11.1.11 Your time is used effectively throughout your working day
- 11.1.12 Problems likely to affect travel and tourism services are reported to the relevant person promptly and accurately
- 11.1.13 Act upon development opportunities
- 11.2 Evaluate own personal performance in a consistently positive and professional manner, take on feedback and welcome personal development opportunities.
 - 11.1.1 Seek feedback on your performance from colleagues and managers
 - 11.1.2 Seek advice and information from colleagues as necessary
 - 11.1.3 Evaluate own personal performance

12 Communication

- 12.1 Select and use appropriate methods of communication including digital technologies according to the customer and the nature of the travel details being conveyed, ensuring quotes and prices are presented accurately.
 - 12.1.1 How to use visual aids to help others understand points you are making
 - 12.1.2 How to ensure accuracy by proof-reading and re-drafting
 - 12.1.3 Communications are polite and professional at all times
 - 12.1.4 Adapt communication styles to suit different situations
 - 12.1.5 Use questioning techniques and listening skills
 - 12.1.6 Use visual aids to help communicate
 - 12.1.7 Communicate clearly and accurately
 - 12.1.8 Move discussions forward
 - 12.1.9 Use appropriate styles of communication
 - 12.1.10 Use your organisation's digital resources to communicate
 - 12.1.11 Review and check written communication
 - 12.1.12 Take prompt action to rectify mistakes if necessary
- 12.2 Be clear and coherent to effectively communicate accurate and complex information professionally and confidently to a diverse audience, in line with business expectations
 - 12.2.1 Give and explain any information required by customers clearly and accurately
 - 12.2.2 Be clear and accurate in your explanations
 - 12.2.3 Summarise your understanding of your customers' needs accurately

13 Sustainability

- Adapt working practices to minimise the negative effect on the environment.
 - 13.1.1 Follow environmentally friendly working practices
 - 13.1.2 Follow organisational policy on sustainability and waste management
-

Appendix 2

Example Evidence and mapping reference for My Journey Log

Client Brief

Geoff Brown has contacted his local Travel Agent wanting to book the following travel arrangements:

- 1 Depart from a London airport on the first Tuesday of next month (morning departure) to arrive at Bangkok
- 2 Spend two nights in hotel accommodation close to the airport
- 3 Depart Bangkok and fly to Shanghai
- 4 Spend 5 nights in city centre hotel accommodation in Shanghai
- 5 Depart Shanghai and fly to Hong Kong
- 6 Spend 2 nights in hotel accommodation in Hong Kong close to the airport
- 7 Depart Hong Kong and return to the same UK airport as departure

The budget for the hotel accommodation is approximately GBP150.00 per night incl taxes. All flights should be booked in economy class. He would like to book the cheapest airfares.

Be sure to provide information on additional products and services. Include the following details on the itinerary:

- Refund/Cancellation policies
- Procedures for alterations to the bookings
- Passport information
- Visa information
- Foreign currency requirements

TRAVEL ITINERARY

(4.1.4, 4.1.7, 4.1.8)

Smiths Travel									
Geoff Brown						Ti	Mr		
						tl			
						e			
Tel: 123456789					Email: example@example.com				
Flight/Service No	Name of Operator	From	To	Class of Travel	Dep Date/Time	Arr Date/Time	Booking Ref	Fare Incl Taxes	
TG911	Thai Airways	London Heathrow (LHR)	Bangkok Suvarnabhumi (BKK)	Economy	06 NOV 1150	07 NOV 0615	DLU511	GBP 418.31	
TG662	Thai Airways	Bangkok Suvarnabhumi (BKK)	Shanghai Pudong (PVG)	Economy	10 NOV 0110	10 NOV 0625	BV2XYS	GBP 290.39	
CA1590	Air China	Shanghai Hongqiao (SHA)	Beijing (PEK)	Economy	15 NOV 0850	15 NOV 1115	ZKV492		
CA109	Air China	Beijing (PEK)	Hong Kong (HKG)	Economy	15 NOV 1300	15 NOV 1645	FSD365	GBP 232.32	
BA0032	British Airways	Hong Kong (HKG)	London Heathrow (LHR)	Economy	17 NOV 2330	18 NOV 0445	ADR496	GBP 658.37	
Check-in	Check-out	No. of nights	Room Type	Basis	Total cost				
07NOV 1500	09NOV 1200	2	Standard Double Bed	B&B	GBP71.00				
10NOV 1200	15NOV 1100	5	Premier Twin Room	RO	GBP837.00				
15NOV 1400	17NOV 1100	2	Superior Room Queen Bed		GBP357.00				

Travel Itinerary - Evaluation and Reflection

Firstly, I asked the customer if he was flexible with his travel arrangements as I suggested he flew to Shanghai first, then visited Hong Kong and onto Bangkok however I couldn't change his mind as he had already made plans in those cities for those dates. (1.2.1, 1.2.2, 2.1.2)

I booked the customer with Thai Airways from London to Bangkok as British Airways only had a late afternoon flight and the customer wanted a morning one. I explained that these airlines belong to different airline alliances and therefore he wouldn't be able to collect any points on his BA frequent flyer card with Thai Airways. (2.1.2, 4.1.5, 4.1.6, 6.1.12)

The Air China flight to Shanghai Pu Dong was in the middle of the night whereas, although not ideal, the Thai Airways option was at 0110 which is why I had to book him on the flight on 10Nov as opposed to the 09Nov. The customer needed to be in Bangkok all day on 9th November too so he couldn't make the late afternoon flight. Another option was for the customer to depart at 1915 from Bangkok but it was an indirect flight and would have added 5 hours onto his journey. (1.2.1, 1.2.2, 4.1.5, 4.1.6, 6.1.12)

I booked the flights from Shanghai Hongqiao Airport to Hong Kong via Beijing with Air China because this was the best connection. (1.2.1, 1.2.2)

I needed to book the British Airways flight from Hong Kong to London Heathrow as the Cathay Pacific flight departed at 1510 and the customer wanted a full day in Hong Kong. He was also a BA Gold Executive card member so ideally, I wanted to book him onto a BA flight. I ensured that his BA Frequent flyer card number was in his booking. (6.1.20)

The hotels I booked were ideally located and were within the customer's budget. We also get great rates of commission with Swisshotel. I arranged his foreign currency and visas which earned us an additional transaction fee and commission rates. I also offered him some transfer options however he wanted to arrange the transfers himself locally. (5.1.5, 5.10, 6.1.13, 10.1.10, 10.1.11)

I used the Amadeus GDS to research and book the flight and hotel options and used CIBT Visas website to get the visa latest visa information. The customers booking is stored securely on our GDS along with the traveller's personal details. A travel itinerary was sent to the customer via email. (1.1.1, 1.1.3, 2.1.4, 3.1.1, 3.1.5, 3.1.6, 4.1.7, 4.1.8)

Travel Itinerary submitted against the following outcomes/elements:

1.1 Source and provide reliable and relevant geographical information that will help inform enquiries, support, customers' travel decisions and close sales.

1.1.1 Reliable sources of information are used to meet customers' requirements

1.1.3 All geographical information provided to customers is accurate and up to date

1.2 Proactively keep up to date with worldwide geography and current affairs that could impact on customers

1.2.1 Support customers to make informed decisions about purchases using geographical knowledge

2.1 Source and provide accurate and relevant travel information that will ensure customers have a positive travel experience.

2.1.2 Use knowledge and awareness of travel geography to establish the confidence of customers

2.1.4 Provide customers with relevant, complete, accurate and up to date information and advice

3.1 Carry out transactions, using a range of reservation and booking systems, according to standard industry practices and the procedures of the business, ensuring that customers are offered travel options that will meet their individual needs within agreed deadlines.

3.1.1 Appropriate booking systems are used correctly, safely and securely

3.1.5 Customer information is recorded, processed and stored to meet the organisation's procedures and legal requirements

3.1.6 The booking/administration is completed promptly and correctly to meet your organisation's procedures and other legal and regulatory requirements

4.1 Source travel options, work with relevant industry suppliers and produce detailed itineraries that best meet customers' needs

4.1.4 Produce travel itineraries and costings likely to meet your customers' expectations

4.1.5 Manage customer expectations around limitations

4.1.6 Customers are presented with suitable alternatives where proposals do not specifically match their original requirements

4.1.8 Itineraries and prices are presented clearly and accurately

4.2 Demonstrate considerations for customers' unique needs when selecting and combining different elements of customers' travel plans

4.2.1 Select the most profitable options to suit your organisation

5.1 Match customer needs to products and services and identify opportunities to upsell, suggest alternatives, introduce an enhanced competitive offer when appropriate and always aim to maximise profit when closing the sale.

5.1.5 Additional requirements of the customer are identified

5.1.10 Extra travel products and services are identified and sold effectively

6.1 Engage customers by building rapport and take opportunities to adapt communication styles to match their needs and deliver an enhanced service which encourages repeat business and consistently aims to exceed their expectations.

6.1.12, explain clearly to your customers any reasons why their expectations cannot be met

6.1.13 identify options that will give added value to your customer service

6.1.16 Inform customers promptly of any changes to bookings and the financial and other implications of the change

7.1 Conduct the business transaction in compliance with travel industry regulations, approved codes of practice and business policy and continuously monitor the process to ensure accurate information and advice is given to customers.

7.1.1 Relevant terms, conditions and legal requirements relating to the sale are described clearly

10.1 Achieve and exceed commercial targets by applying selling techniques that are appropriate to all customer types, take opportunities to maximise sales for example by selling promotions and preferred supplier

programmes and maximise financial performance by upselling, cross-selling and calculating fares and refunds accurately.

10.1.5 Customers' objections are dealt with positively

10.1.10 Extra travel products and services are identified and sold effectively

Example of partially completed Evidence reference form

		Employer- /Training- Provider- only	Employer-/- Training- Provider- only	standard IEPA-only
Geography				
☐	Source and provide reliable and relevant geographical information that will help inform enquiries, support, customers' travel decisions and close sales.	Travel Itinerary	1.1.1 1.1.3	☐
☐	Proactively keep up to date with worldwide geography and current affairs that could impact on customers.	Travel Itinerary	1.2.1	☐
Travel information				
☐	Source and provide accurate and relevant travel information that will ensure customers have a positive travel experience.	Travel Itinerary	2.1.2 2.1.4	☑
☐	Proactively keep up to date with travel information according to the customer profile of the business and the ever-changing dynamics of the industry.	☐	☐	☐
Industry practice				
☐	Carry out transactions, using a range of reservation and booking systems, according to standard industry practices and the procedures of the	Travel Itinerary	3.1.1 3.1.5 3.1.6	☑
	business, ensuring that customers are offered travel options that will meet their individual needs within agreed deadlines.			
☐	Take a keen interest in travel industry developments to keep professional knowledge current and up to date.	☐	☐	☐
Travel options				
☐	Source travel options, work with relevant industry suppliers and produce detailed itineraries that best meet customers' needs.	Travel Itinerary	4.1.4 4.1.5 4.1.6 4.1.8	☑
☐	Demonstrate considerations for customers' unique needs when selecting and combining different elements of customers' travel plans.	Travel Itinerary	4.2.1	☐

Appendix 3

700/701, 750/751 Professional discussion (Corporate/Leisure)

What the professional discussion will cover

Coverage

Geography

- Know popular travel destinations
 - Features of products and destinations which key to your organisation's customers
 - The locations and features of specialist destinations for your organisation's customers
- Help inform travel plans
 - Know the added value that a wide range of geographical knowledge gives to travel proposals
 - The importance of knowing the features of popular travel destinations
- Proactively keep up to date with worldwide geography
 - Keep up to date with current affairs related to the industry
 - Keep professional knowledge current and up to date.

Travel information

Travel information

- The range of enquiries you may be called upon to handle
- The relevant booking conditions and restrictions that customers need to be made aware of
- Your organisation's policies for meeting customers' needs for information, advice and materials
- Where to find specialist expertise and information
- Relevant and reliable sources of information within your organisation
- Diversity information
 - Food, clothing, shopping, entertainment, and culture in key destinations for your organisation's customers
 - Local cultures and customs around the world
- Time zones and climate information
 - The climate in popular destinations for your organisation's customers
- Foreign office advice and information
 - The importance of following Foreign Office advice
- Foreign exchange information
 - Where to find information on national currencies worldwide
 - Where to find exchange rates and what commission is charged
- Proactively keep up to date with travel information according to the customer profile of the customer and the ever changing dynamics of the industry
 - Enlist the support of colleagues where necessary to help identify sources, secure information and to verify findings
 - Keep up to date with security and safety risks that could affect customers

Industry practice

- Know the travel industry and systems that support it
 - Types of systems that support your organisation

Coverage

- Operators' current fare and ticketing rules
 - Customer loyalty schemes
 - Preferential rates offered by your organisation
- Travel regulations
 - Where to access information about travel regulations
- Show enthusiasm for keeping up to date with wider travel industry developments

Travel options

- Travel options
 - Sources of information on major parking operators at the main UK airports
 - Sources of information on airport taxi and transport arrangements to major UK departure points
 - Where to access and how to interpret information about onward travel (Leisure only)
 - How to use and interpret online and offline sources to provide travel information
 - Deck plans, on-board facilities, excursions, entertainment and restaurant sittings (Leisure only)
 - How to calculate costings for all types of travel
- Accommodation options
 - Service charges - what they are and when they need to be applied
- How to produce an itinerary that will meet the customers precise needs
 - How to ensure tickets, vouchers and associated documentation are accurate
 - The importance of presenting alternatives when proposals do not match customer requirements
- Demonstrate commercial awareness
 - Establish and maintain good relationships with suppliers
- Demonstrate considerations for customers' unique needs when selecting and combining different elements of customers' travel plans
 - Demonstrate a clear understanding of different customers and their real and perceived needs

Products and services

- Know the unique selling points of travel products and services
 - The range of the organisation's core and additional products
 - Key features of the products and destinations which are popular with your organisation's customers
 - How the travel arrangements and additional services can be combined to match the needs of customers
 - Characteristics and selling points of different booking options
 - How to locate additional service benefits
 - Insurance products offered by your organisation (Leisure only)
- Know how to match features and benefits to customers
 - Key features and benefits of different products
 - How to balance the needs of your organisation and the customers
- Provide an enhanced competitive proposition
 - How to influence customers' decisions by using your experience and knowledge
- Enthusiasm and passion for products is evident during interactions with customers

Coverage

Customers

- Know different customer profiles
 - How to build long term relationships with customers
 - The importance of customer loyalty to your organisation
- How to recognise and identify requirements and individual needs, their preferred methods of booking travel
 - Your organisation's guidelines for how to recognise what your customer wants and respond appropriately
 - Your organisation's standards for timeliness in responding to customer questions and requests for information
 - Organisational procedures and systems for dealing with customer service problems
- How to meet the increasing demand for an enhanced travel experience
 - Your organisation's rules and procedures that determine your authority to enhance the travel experience
 - How to negotiate with customers in a way that balances their expectations that would be acceptable to the organisation
 - The relationship and inter- dependency between customer experiences of leisure travel services and business travel services
 - Methods of monitoring customer/corporate account satisfaction used by your organisation
- Act on opportunities to inspire customers in all interactions

Legal and compliance

- Know how to keep customers' details safely
 - Your organisation's requirements and procedures for recording and storing data and information and processing data and information
 - Your organisation's disaster recovery and/or business continuity plan
- Lawfully process business transactions
 - Your organisation's procedures for making changes to customer bookings
 - Your organisation's operating limits on stock holding and till cash holding limits
- Relevant legislation
 - The importance of using live reservation systems
- Be diligent in upholding protocols and business reputation to ensure customers receive the best quality service and advice
 - Act with integrity to uphold business reputation
- Communicate and explain emerging issues and updates
 - Seek advice promptly from an appropriate person when you are unsure of how to handle a situation
 - Keep customers informed in relation to travel arrangements

Industry technology

- Know how to utilise technology in line with customer and business requirements
 - How to use current travel services booking systems.
 - How technology can support the booking of products and ancillary services

Coverage

- How to use electronic inputting and recording systems.
- How to use and interpret any relevant websites and databases to provide information and costings.
- Electronic sources of information relating to products and services and how to use and interpret them.
- How customers access and manage their own electronic profile.
- How to access and use your organisation's computer reservation systems
- Your organisation's social networking policy.
- Which parts of your organisation's business could benefit from or contribute to the success of the social network.
- How customers learn and develop their skills in using web-based technology
- The scope of technology used within the business and the industry as a whole
 - Sources of up-to-date information about trends and technological developments relating to social networking
 - The growing range of travel-based mobile apps to use before, during and after travel
- Use technology responsibly and embrace developments in travel technology
 - Be a passionate advocate for you organisation's digital offer
 - Use technology responsibly and in line with organisational procedures
 - Seek opportunities to up to date with new technology in line with organisational aims

Business

- Know the business vision, objectives and brand standards
 - How productivity targets and timescales impact on business success.
 - The importance of personal development targets and timescales and how these impact on business success.
 - Values and Behaviours that are consistent with your organisation's vision and strategy.
 - Your organisation's requirements for corporate image
 - The brand value of the business.
 - The implications of not meeting agreed Service Level Agreements (Corporate only)
 - External factors that affect customer behaviour and business performance
 - Market developments relevant to the industry/sector within which your organisation operates.
 - Your organisation's principal competitors, their products and the nature of their marketing and sales activities.
 - Understand the importance of meeting customers' needs profitably
 - Commercially viable range of service times
 - how to meet customer needs whilst ensuring profitably for the organisation
 - Engage with the culture and ethos of the business
 - Demonstrate personal drive to deliver the business vision and objectives.
 - Be a positive advocate and driver for high quality performance and achievement
 - Promote a positive image of yourself and your company to customers.
 - Take ownership of goals and targets
 - Recognise when to escalate feedback around suppliers within your organisation
-

Coverage

Sales

- Know how to operate commercially with the aim of exceeding sales targets
 - How to use selling techniques
 - The commissions payable by different suppliers service charges
- How to calculate complex travel costings
- How individual targets contribute to the organisation's overall target
- Find out your customers' needs by using suitable questioning techniques and effective listening skills
- Handle queries in ways that promote sales

Team and personal performance

- Factors that both motivate and impair individual and team performance
 - How to identify your own strengths and weaknesses
 - The importance of continually using and updating your own personal work plan
 - Why it is important for your own development to maintain awareness of current and emerging trends and developments
 - The importance of continuous professional development
 - How individual behaviour can impact wider team performance
- Recognise how own and team dynamics impact on the experience of the customer and ultimately business success
 - How to react positively to reviews and feedback and why this is important
 - How to support co-operative ways of working
 - How to manage your time effectively, prioritise work and balance different customer needs
 - How to deal with relationship difficulties and conflicts when working with others
 - Why harmonious working relationships are important
 - Your job role and responsibilities and how this relates to the role of other team members
 - Who can help you identify and obtain opportunities for your development/training
 - How to find out and understand about other people's areas of responsibility relevant to your role within your organisation
 - How your role fits into the wider business structure
- Take on feedback and welcome personal development opportunities
 - Make effective use of time
 - Take ownership of goals and targets
 - Reflect regularly on your own and others' experiences and use these to inform future action

Communication

- Understand how to professionally communicate to different audiences using a variety of methods
 - How to adapt communication methods effectively to suit different situations and audience
 - Know how to overcome barriers to communication
 - How to question customers to find out their needs
 - The importance of clear and accurate communication
 - Why it is important to display professional attitude
 - How to listen effectively
 - The impact of clear and accurate proposals

Coverage

- How to present written proposals and information in different situations
- How to move a discussion forward
- Why it is important to be helpful and polite
- How to communicate using digital resources
 - How to gather information from customers at different contact points
 - Know your organisation's available methods of digital resources to communicate
 - Know the benefits of different methods of digital communication to a diverse audience
- Be clear and coherent to effectively communicate accurate and complex information professionally and confidently in line with business expectations
 - Greet customers in a prompt, friendly and confident manner
 - Find out your customers' needs by using suitable questioning techniques and effective listening skills
 - Remain open and flexible in responding to customers by following their cues
 - Communicate with your customers in a way that maintains their goodwill and confidence in you and your organisation
 - Use varied vocabulary and expressions to suit your purpose and adapting what and how much you say to suit different situations
 - Show you are listening closely and responding appropriately (e.g. by using your own and interpreting others' body language)
 - Use negotiation and communication skills when finding possible resolutions to customer service problems

Sustainability

- The organisation's approach to operate in a more responsible and sustainable manner
 - Sources of information for developing awareness of sustainable travel
 - Show an on-going commitment to reducing impact on the environment in all work activities
 - Look for opportunities within your organisation to reduce impact on the environment by working sustainably
-

Useful contacts

Centres

Exam entries, Certificates,
Registrations/enrolment, Invoices, Missing or
late exam materials, Nominal roll reports,
Results

E: centresupport@cityandguilds.com

Learners

General qualification information

E: learnersupport@cityandguilds.com

Other contacts

For other contacts visit the Contact Us page
of our website

W: www.cityandguilds.com/help/contact-us

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