

Unit 4: Customer Service in Travel and Tourism

Unit code:	L/600/9488
QCF Level 3:	BTEC National
Credit value:	10
Guided learning hours:	60

● Aim and purpose

This unit enables learners to gain understanding of how excellent customer service contributes to the success of travel and tourism organisations. Learners will develop knowledge and skills to provide customer service and achieve sales in travel and tourism situations.

● Unit introduction

Customer service is of vital importance to all organisations in the travel and tourism sector. Excellent customer service results in a high level of satisfaction and encourages customers to return and to recommend the organisation to others. Many organisations in the travel and tourism sector offer the same or similar products and services, and it is often the quality of the customer service which distinguishes one from another.

Travel and tourism organisations realise that consistently high standards of customer service will ensure customer loyalty and improve business performance. This unit introduces learners to the principles of customer service as they apply to travel and tourism.

The skills needed by an employee of a travel and tourism organisation are developed in this unit. Aspects such as personal presentation, teamwork and communication skills are all exceptionally important to the provision of excellent service. Travel and tourism organisations are in the business of providing information and selling products and services, and learners will have the opportunity to develop and demonstrate these skills with customers in real or simulated situations across different industries within the sector.

Meeting the specific needs of different customer types will be dealt with to ensure that all learners appreciate the importance of treating customers as individuals.

The knowledge that learners gain from this unit will help to prepare them for offering excellent customer service within any travel and tourism organisation.

● Learning outcomes

On completion of this unit a learner should:

- 1 Understand the importance of providing excellent customer service in travel and tourism organisations
- 2 Know how travel and tourism organisations adapt customer service to meet the individual needs of customers
- 3 Know the customer service skills required to meet customer needs in travel and tourism contexts
- 4 Be able to apply customer service and selling skills in travel and tourism situations.

Unit content

1 Understand the importance of providing excellent customer service in travel and tourism organisations

Customer service: first impressions; company image eg logo, premises, organisational efficiency; speed and accuracy of service; consistency; products and services offered; meeting customer needs; offering information and advice; dealing with complaints; dealing with problems; meeting and exceeding customer expectations

Importance to the organisation: keeping existing customers satisfied; increasing customers' loyalty; ensuring repeat business; enhancing an organisation's image; providing an edge over the competition; increasing sales and usage by attracting new customers; the consequences of poor customer service for the customer, the staff and the organisation

Importance to the customer: meeting individual customer needs; exceeding customers' expectations; safe and secure environment for internal and external customers

Importance to the employee: a happier working environment; job satisfaction; job security; higher self-esteem; possibility of promotion

2 Know how travel and tourism organisations adapt customer service to meet the individual needs of customers

Different types of customer: individuals eg leisure, business; groups

Individual needs: products and services; stated; unstated; special needs eg medical conditions, mobility; customers with cultural and language needs; other needs eg relating to age, gender, socio-economic group, family circumstances

3 Know the customer service skills required to meet customer needs in travel and tourism contexts

Communication skills: face to face; telephone eg call centre; building rapport; effective listening; questioning; developing a dialogue; non-verbal communication eg body language, eye contact; written communication

Presentation: of self eg hygiene, dress, personality, appearance; of working environment

Teamwork: eg motivation, team roles, delegation of tasks, lines of authority; benefits of teamwork to colleagues, customers and the organisation

Business skills: completion of documentation eg tickets, forms; use of IT eg email, computerised reservations system (CRS), internet; business standards eg accuracy, legibility, business conventions

Complaint handling: listening; questioning; empathising; understanding the problem; taking control of the situation; agreeing solutions; follow up

Selling skills: building rapport; establishing customer needs and expectations; product knowledge; features and benefits; overcoming objections; closing the sale

4 Be able to apply customer service and selling skills in travel and tourism situations

Customer service: providing information and advice; providing assistance; dealing with complaints; dealing with problems eg overbookings, lost property; making sales; after sales advice; product knowledge

Situations: verbal (face-to-face, telephone); non-verbal (written, electronic); holiday sales eg accommodation reservations, flight bookings, ticket sales, excursion sales; requests for information eg flight and journey details; requests for advice eg visa and health requirements; complex requests eg airport assistance, priority seating and flight upgrade; complaints eg flight delays, poor quality accommodation

Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
<p>P1 explain the importance of providing excellent customer service in travel and tourism organisations</p> <p>P2 describe customer service provision in travel and tourism organisations to meet the individual needs of different types of customers</p>	<p>M1 assess how customer service provision meets specific customer needs in travel and tourism organisations</p>	<p>D1 make recommendations for how a travel and tourism organisation can improve its customer service provision to meet specific customer needs</p>
<p>P3 describe the customer service skills required to meet customer needs in travel and tourism contexts</p>		
<p>P4 demonstrate customer service skills in travel and tourism situations [SM 1, SM 2]</p>	<p>M2 deal independently with customers in travel and tourism situations</p>	<p>D2 demonstrate good product knowledge, customer service and selling skills to provide a consistently high standard of customer service in different situations.</p>
<p>P5 demonstrate selling skills in a travel and tourism situation [SM 1, SM 2, EP 5].</p>	<p>M3 demonstrate effective selling skills in a travel and tourism situation.</p>	

PLTS: This summary references where applicable, in the square brackets, the elements of the personal, learning and thinking skills applicable in the pass criteria. It identifies opportunities for learners to demonstrate effective application of the referenced elements of the skills.

Key	IE – independent enquirers	RL – reflective learners	SM – self-managers
	CT – creative thinkers	TW – team workers	EP – effective participators

Essential guidance for tutors

Delivery

This unit gives learners an understanding of the vital importance of excellent customer service to the success of travel and tourism organisations.

Learners can use their own experiences of customer service either from their part-time jobs, from work experience, or as customers themselves in order to explore the subject in group discussions, differentiating between what constitutes poor, acceptable, good and excellent standards of service. These should be explored in travel and tourism contexts.

Learners should be encouraged to research a variety of travel and tourism organisations to enable them to find out how customer service is provided and why it is important. This research can be undertaken with local employers, using websites of travel and tourism companies, case studies and information packs produced by major travel and tourism organisations such as Thorpe Park and Chester Zoo.

First impressions, company image, organisational efficiency, speed and accuracy of service and products and services offered could be studied by undertaking a visit to an organisation. This can be done in the form of a mystery shopper exercise or observation. Learners could take photographs to illustrate their findings.

Visits from guest speakers will add currency to delivery and will allow learners to discuss other aspects of customer service including teamwork, effective communication, and speed and accuracy of service. Guest speakers from various travel companies can also be asked to discuss the effect of good and poor customer service provision.

A residential visit, either in the UK or overseas, could be used to visit and research organisations such as airlines, train companies, tour operators, accommodation and attractions and to identify their service levels, customer types and needs.

From their visits and investigations into companies, learners will have identified some of the customer types the organisation serves. Learners should be encouraged to discuss the individual needs of the different customer types and how the organisations cater for specific needs.

Tutors should introduce learners to the skills required for customer service. They should also give input on the different stages of a sale. There are many suitable DVDs which can be used to illustrate customer service and selling. In addition tutors should cover the ways of dealing with complaints. It would be useful to look at terms and conditions of travel and tourism organisations on complaints and on their policies for dealing with complaints. These are often published; for example, many airline websites state complaint policy. The stages involved in selling, dealing with complaints and the actions to be taken when dealing with enquiries will require some formal input. Role play will be a key method in the teaching and learning of this unit, as learners are expected to demonstrate both customer service skills and selling skills. A range of customer profiles could be produced such as leisure travellers, families, groups, business travellers and those with specific needs, together with scenarios for each type at different levels of complexity. The scenarios should provide opportunities to deal with complaints and a range of situations including requests for information, advice, both routine and complex requests and problems. It is essential that before formal assessment takes place learners are given the opportunity to practise and receive feedback on their performance in a variety of situations, using not only face-to-face methods, but also written, electronic and telephone communication.

The stages of selling must be demonstrated by all learners. Videos and role play can be used, observed and evaluated by learners' peers.

Work experience and/or work shadowing would also be a useful method of teaching learners the stages of selling.

Videos, DVDs and TV programmes such as 'Airline' are also beneficial as, when combined with discussion, they enable learners to understand aspects such as handling difficult customers and complaint handling.

Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan demonstrates one way of planning the delivery and assessment of this unit.

Topic and suggested assignments/activities and/assessment
Introduction and overview of the unit
Defining customer service
Discussion of customer service and personal experiences
Introduction to Assignment 1
DVD – <i>Fawlty Towers</i> – discuss in context of unit
Input, discussion first impressions
Paired research into image and logos – compare
Case studies on efficiency, speed, accuracy and consistency of service
Mystery customer visits to research on customer service
DVD – poor customer service and discussion on lessons to learn
Visiting speaker from local travel and tourism organisation – importance of customer service
Discussions and presentations
Products and services and customer needs – matching game
Visit – different types of customer – research and profiles
Individual research into customer service provision in different organisations – targeted research for higher grades
DVD and case study – EasyJet (airline series)
Research and preparation for Assignment 1
Assignment 1: Aiming for Excellence (P1, P2, M1, D1)
Feedback on assessment
Introduction to Assignment 2
DVD communication skills
Discussion and activities to identify good practice
Body language role play
Telephone skills 'training session'
Call centre case study
Small group work to set presentation guidelines for different types of travel and tourism employees
Team activities and discussion on teamwork skills

Topic and suggested assignments/activities and/assessment
Guidelines for business communications, documentation and IT
Review of typical forms and documents
Practical activities to complete documentation, send email, produce letter – identifying areas for improvement for higher grades
Preparing for, practising telephone role play and written response to queries
Completion of telephone role play and written scenario
Assignment 2: Delivering Excellence (P4, M2, D2)
Feedback on assessment
Tutor presentation on stages for complaint handling
DVD – discussion and role play
Input on the stages of selling – developing selling skills – activities to identify features and benefits
Assessment activities Part A – skills and techniques – finding examples to support assessment
Assignment 2: Delivering Excellence (P3)
Feedback on assessment
Practise complaint handling – giving and receiving feedback – how to work to higher grades
Completion of complaint role plays
Assignment 2: Delivering Excellence (P4, M2, D2)
Feedback on assessment
Preparation and practise selling skills – to individuals, groups – giving and receiving feedback – how to work to higher grades
Completion of selling skills role play
Assignment 2: Delivering Excellence (P5, M3, D2)
Feedback on assessment and unit review

Assessment

The assessment criteria can be grouped together to enable learners to expand on one criterion in order to gain higher grades. The links are as follows: P1, P2, M1 and D1; P3, P4, P5, M2, M3 and D2. Where possible learners should be encouraged and given the opportunity to meet the higher grades at the same time as they attempt the appropriate pass criteria.

Centres should design their assessment strategies to meet a range of individual needs and the local work environment. Assessment should encourage learners to apply knowledge gained from this unit and reflect on understanding gained from other units.

P1 – P2 – M1 – D1

The evidence for P1 must include an explanation of the importance of excellent customer service to the organisations, to the customer and to the employee.

Learners should explain the importance of excellent customer service, covering all items contained in the content range following the italic sub-headings, ie customer service, importance to the organisation, importance to the customer and importance to the employee. The explanation should be supported by examples from at least two travel and tourism organisations. The examples could be generated by visits to organisations or by case study information and websites of travel and tourism companies, or a mixture of these. It is essential that suitable examples are found to support coverage of the full content range.

P2 progresses from P1 and learners must describe customer service provision, and how it is adapted to meet the individual needs of different types of customers, including internal customers, individuals and groups. Customer service provision must include products and services, stated and unstated needs, special needs, customers with cultural and language needs and other needs, for example relating to age, gender, socio-economic group, family circumstances, eg needs of families with young children/babies. The description can be broad but must be supported by sector specific examples, eg Virgin Atlantic customers include business travellers and wealthy leisure travellers in upper class and premium economy. Less wealthy leisure travellers are served by an economy cabin. Differentiation of the products and services for the different classes would be included, saying how these meet the needs of the different types of customers. Learners must relate P2 to at least two travel and tourism organisations and these can be the same as those used for P1 if preferred.

M1 further develops P2. In order to achieve M1, learners will need to assess the customer service provided by selected organisations, making a clear link to how it meets the specific needs of different types of customers. This will require some judgement on the effectiveness of the provision. Customer profiles can be provided so that learners can identify the specific needs to be satisfied and illustrate with examples how they are satisfied.

For D1, learners need to recommend ways in which a selected organisation could better meet its specific customer needs. Examples of improvements could be in the form of changes to products, new procedures to improve speed and efficiency of service, enhanced company image.

The evidence for the above criteria could be presented as a written report or as a presentation with detailed observation record and accompanying notes, video and slide copies or detailed preparatory notes for an article.

P3 – P4 – P5 – M2 – M3 – D2

P3 asks learners to describe the skills required to meet the needs of customers in travel and tourism contexts. Learners should cover communication skills, presentation, teamwork, business skills, selling skills and skills needed to handle complaints. It is important that the descriptions relate to customer service skills in travel and tourism contexts. A general description of customer service skills without relevant travel and tourism examples would not meet P3. Learners could be introduced to the customer service skills required by researching them in the same organisations they used for examples for P1 – P2 or by hearing a guest speaker talk about customer service skills required for their organisation.

Having described these skills, learners will have the opportunity to put them into practice as P4, P5, M2 and M3 must be assessed through practical activities. This could be in real travel and tourism workplace situations, or may be simulated through role-plays. All assessment evidence for these criteria could be supported by observation sheets signed by the assessor which details how each criterion has been achieved. This observation sheet must give details of the situation and a description of the learner's performance when interacting with the customer and meeting their needs. There could also be a summative statement regarding the quality of that performance.

For P4 and M2, learners should demonstrate their skills in at least three situations, one of these being in writing (paper-based or electronic), one face-to-face and one on the telephone. One situation for P4 must demonstrate skills in dealing with a complaint. Industry relevant documentation must be completed for one of the situations in P4, for example a lost property report form or customer service report.

At this level situations for assessment require dialogue to be developed between the learner and the customer and there is a need to use listening and questioning skills. A selection of scenarios from different industries within travel and tourism and customer profiles can be provided by the assessor as necessary. Learners must attempt to use all customer service skills listed in the unit content, although their success with some aspects might be limited. At pass level there may still be areas for improvement. Independent and effective application of customer service/selling skills in all situations will contribute to the achievement of M2 and M3.

To satisfy P5, learners must demonstrate selling skills in a travel and tourism sales situation. This should include building rapport, establishing customer needs and expectations, showing product knowledge including some features and benefits, and demonstrating some skills to overcome objections and close the sale.

For M3, they must demonstrate effective selling skills and show good product knowledge to highlight relevant features and benefits, and bring the sale to an effective close, overcoming objections.

In addition to observation sheets (and witness statements from employers) video evidence may also be used, self and peer evaluations, supporting notes, documentation etc but individual learners must be clearly identified, and supporting written evidence provided by the tutor.

For D2, learners will have provided a consistently high standard of customer service in different situations. When making a sale they will have demonstrated strong selling skills and excellent product knowledge to bring about a successful sale of suitable products and services to meet customer needs and expectations. When dealing with a complaint, learners will have shown the ability to take control of the situation and used complaint handling skills to effect a satisfactory outcome. They will have demonstrated knowledge of products or procedures when dealing with an enquiry, providing information etc. Learners will have communicated appropriately and demonstrated the full range of customer service skills across the evidence as a whole. Tutor evidence, peer and self-evaluation will support achievement of this criterion.

Programme of suggested assignments

The table below shows a programme of suggested assignments that cover the pass, merit and distinction criteria in the assessment and grading grid. This is for guidance and it is recommended that centres either write their own assignments or adapt any Edexcel assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1, P2, M1, D1	Assignment 1: Aiming for Excellence	Working for a travel training organisation: making a presentation on the importance of customer service provision in travel and tourism organisations	Presentation with accompanying notes or article
P3, P4, P5, M2, M3, D2	Assignment 2: Delivering Excellence (P3) (P4, P5, M2, M3, D2)	Working for a travel training organisation: preparing training session on the customer service skills necessary for travel and tourism Practical activities dealing with customers, including handling a complaint and selling to customers	Detailed handout on customer service skills Observation and witness statements following role play or real work situations Self and peer-evaluations Documentation

Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the BTEC Travel and Tourism sector suite. This unit has particular links with:

Level 2	Level 3
Exploring Customer Service in Travel and Tourism	Investigating the Travel and Tourism Sector
Developing Customer Service Skills	Marketing Travel and Tourism Products and Services
Developing Employability Skills for Travel and Tourism	Specialist Tourism
	Passenger Transport for Travel and Tourism
	Tourism in Rural Areas
	UK Visitor Attractions

Essential resources

Learners must have access to the internet in order to research customer service in travel and tourism organisations. Examples of customer service charters can be useful. Learners will need access to customer service documentation, for example blank customer service report forms.

Employer engagement and vocational contexts

This unit links to the National Occupational Standards in Travel Services at Level 3. Visits to organisations will be a useful feature for this unit.

This unit links to the following NOS in Travel and Tourism:

- TT24 Monitor and solve customer service problems.

Indicative reading for learners

Dale G – *BTEC Level 3 National Travel and Tourism Student Book 1* (Pearson, 2010) ISBN 9781846907272

Dale G – *BTEC Level 3 National Travel and Tourism Student Book 2* (Pearson, 2010) ISBN 9781846907289

Dale G, Kelly M, King C and Jefferies M – *BTEC Level 3 National Travel and Tourism Teaching Resource Pack* (Pearson, 2010) ISBN 9781846907296

James E, Thirlaway J and Woodhouse U – *BTEC National in Travel and Tourism* (Hodder Education, 2007) ISBN 9780340945735

Delivery of personal, learning and thinking skills (PLTS)

The table below identifies the opportunities for personal, learning and thinking skills (PLTS) that have been included within the pass assessment criteria of this unit.

Skill	When learners are ...
Self-managers	demonstrating customer service and selling skills in travel and tourism situations [SM 1, SM 2]
Effective participators	demonstrating customer service and selling skills in travel and tourism situations [EP 5]

Although PLTS are identified within this unit as an inherent part of the assessment criteria, there are further opportunities to develop a range of PLTS through various approaches to teaching and learning.

Skill	When learners are ...
Reflective learners	reflecting on customer service and selling skills
Self-managers	managing the assessment of the unit

● Functional Skills — Level 2

Skill	When learners are ...
ICT — Use ICT systems	
Select, interact with and use ICT systems independently for a complex task to meet a variety of needs	writing up the assignment
Use ICT to effectively plan work and evaluate the effectiveness of the ICT system they have used	planning the assignment
Manage information storage to enable efficient retrieval	writing up the assignment
Follow and understand the need for safety and security practices	ongoing
Troubleshoot	as required
ICT — Find and select information	
Select and use a variety of sources of information independently for a complex task	writing up the assignment
ICT — Develop, present and communicate information	
Enter, develop and format information independently to suit its meaning and purpose including: <ul style="list-style-type: none"> • text and tables • images • numbers • records. 	writing up the assignment
Bring together information to suit content and purpose	writing up the assignment
Present information in ways that are fit for purpose and audience	writing up the assignment
English	
Speaking and listening – make a range of contributions to discussions and make effective presentations in a wide range of contexts	demonstrating customer service and selling skills
Writing – write documents, including extended writing pieces, communicating information, ideas and opinions effectively and persuasively	describing customer service provision in travel and tourism organisations to meet the individual needs of different types of customers