Pearson Edexcel Level 2 NVQ Diploma in Travel Services

Pearson Edexcel Level 3 NVQ Diploma in Travel Services

Specification

Competence-based qualifications

For first registration September 2010

Issue 3

Edexcel, BTEC and LCCI qualifications

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This specification is Issue 3. Key changes are listed in summary table on next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

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Summary of Pearson Edexcel Level 2 and 3 NVQ Diploma in Travel Services specification Issue 3 changes

Summary of changes made between previous issue and this current issue	Page number
All references to QCF have been removed throughout the specification	
Definition of TQT added	1
Definition of sizes of qualifications aligned to TQT	2
TQT value added	6 and 9
Guided learning definition updated	15
QCF references removed from unit titles and unit levels in all units	17-322

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

Contents

Introducing Pearson Edexcel NVQ qualifications

What are NVQ qualifications?

National Vocational Qualifications (NVQs) are work-based qualifications that give learners the opportunity to develop and demonstrate their competence in the area of work or job role to which the qualification relates.

NVQs are based on the National Occupational Standards (NOS) for the appropriate sector. NOS define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles. At Level 2 and above, these qualifications are recognised as the competence component of Apprenticeship Frameworks. Qualifications at Level 1 can be used in Traineeships, which are stepping-stones to Apprenticeship qualifications. NVQs qualifications can also be delivered as stand-alone for those who wish to take a work-based qualification.

NVQs qualifications are outcomes-based with no fixed learning programme – allowing flexible delivery that meets the individual learner's needs. They are suitable for those in employment or those who are studying at college and have a part-time job or access to a substantial work placement so that they are able to demonstrate the competencies that are required for work.

Most learners will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment requirements/strategy for the sector. Colleges, training centres and/or employers can offer these qualifications provided they have access to appropriate physical and human resources.

Sizes of NVQ/Competence-based qualifications

For all regulated qualifications, Pearson specify a total number of hours that is estimated learners will require to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification. Within the TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions. In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research. As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications. NVQ/Competence-based qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

Qualification titles covered by this specification

This specification gives you the information you need to offer the Pearson Edexcel Level 2 NVQ Diploma in Travel Services and the Pearson Edexcel Level 3 NVQ Diploma in Travel Services:

Qualification title	Qualification Number (QN)	Accreditation start date
Pearson Edexcel Level 2 NVQ Diploma in Travel Services	500/9726/X	01/09/2010
Pearson Edexcel Level 3 NVQ Diploma in Travel Services	500/9849/4	01/09/2010

You should use the Qualification Number (QN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique reference number, which is listed in this specification.

The qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

Key features of the Pearson qualifications in Travel Services

These qualifications:

- are nationally recognised
- are based on the travel services National Occupational Standards (NOS). The NOS and qualification structures are owned by People 1st.

The Pearson Edexcel Level 2 NVQ Diploma in Travel Services and the Pearson Edexcel Level 3 NVQ Diploma in Travel Services have been approved as components for the Travel Services Apprenticeship/Advanced Apprenticeship framework.

What is the purpose of these qualifications?

These qualifications are aimed at those working or seeking to start a career in travel services. They can be taken whilst in the workplace to allow hands-on experience as learners train. Learners choose between three specialist pathways in Leisure and Business, Tour Operators — Head Office and Tour Operators — Field Staff.

Who are these qualifications for?

These qualifications are for all learners aged 16 and above who are capable of reaching the required standards.

Pearson's policy is that the qualifications should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualification(s).

What are the benefits of these qualifications to the learner and employer?

These qualifications are designed to be applicable to a range of job roles within travel services. They offer the opportunity for learners to gain nationally recognised qualifications while in the workplace.

What are the potential job roles for those working towards these qualifications?

- Tour manager
- Tourist guide
- Travel agent

What progression opportunities are available to learners who achieve these qualifications?

These qualifications offer various opportunities for progression to further learning.

Learners achieving the Pearson Edexcel Level 2 NVQ Diploma in Travel Services may progress to the Pearson Edexcel Level 3 NVQ Diploma in Travel Services. Alternatively, they may progress to Pearson Edexcel BTEC Level 3 Nationals in Travel and Tourism.

Learners achieving the Pearson Edexcel Level 3 NVQ Diploma in Travel Services may progress to the Pearson Edexcel BTEC Level 4 HNC Diploma and Level 5 HND Diploma in Travel and Tourism Management.

What is the qualification structure for the Pearson Edexcel Level 2 NVQ Diploma in Travel Services?

Individual units can be found in the *Units* section. The level and credit value are given on the first page of each unit.

The Total Qualification Time (TQT) for this qualification is 370.

The Guided Learning Hours for this qualification are 326.

To achieve the Level 2 NVQ Diploma in Travel Services, learners must achieve a minimum of 37 credits in total. 13 credits must be achieved from Group A and the remainder of the credits can be made up as follows, depending on the pathway.

Leisure and Business

A minimum of 5 credits from Group B. The remainder of the credits can be made up from Group B or E.

Tour Operators — Head Office

6 credits from Group C. The remainder of the credits must be achieved from Group F.

Tour Operators — Field Staff

4 credits from Group D. The remainder of the credits must be achieved from Group G.

Group A Mandatory units

Unit reference number	Unit title	Credit value
D/601/9345	Develop and Maintain Your Effectiveness at Work in a Travel and Tourism Environment	4
A/601/5867	Ensure Responsibility for Actions to Reduce Risks to Health and Safety	4
L/601/0933	Give Customers a Positive Impression of Yourself and Your Organisation	5

Leisure and Business pathway

Group B

Unit reference number	Unit title	Credit value
D/601/6560	Arrange Non Multi-Sector Air Travel	5
M/601/6580	Help Customers to Choose and Book Travel Services	16

Group E

Unit reference number	Unit title	Credit value
T/601/6595	Build and Maintain Face-to-Face Relationships with Customers	5
F/601/6552	Set Up and Maintain Promotional Displays	4
T/601/7214	Employment Rights and Responsibilities in the Hospitality, Leisure, Travel and Tourism Sector	2
D/601/5151	Process Travel and Tourism Services Payments	3
T/601/5723	Assist Customers Prior To and After Travelling	4
L/601/5727	Research Travel and Destination Information	3
Y/601/5732	Identify and Provide Tourism-Related Information and Advice	5
Y/601/5746	Complete Foreign Exchange Transactions	7
J/601/5760	Arrange Travel Itineraries	7
D/601/6607	Obtain and Analyse Customer Feedback	4

Tour Operators — Head Office pathway

Group C

Unit reference number	Unit title	Credit value
F/601/6440	Build and Maintain Relationships with Customers Not Present	6

Group F

Unit reference number	Unit title	Credit value
D/601/6560	Arrange Non Multi-Sector Air Travel	5
T/601/7214	Employment Rights and Responsibilities in the Hospitality, Leisure, Travel and Tourism Sector	2
T/601/5723	Assist Customers Prior To and After Travelling	4
Y/601/5732	Identify and Provide Tourism-Related Information and Advice	5
J/601/5760	Arrange Travel Itineraries	7
A/601/6548	Process Travel Services Bookings	5
K/601/6559	Assist with Travel and Tourism Problems and Emergencies	4
Y/601/6590	Collect and Maintain Tourism Information and Data	3

Tour Operators — Field Staff pathway

Group D

Unit reference number	Unit title	Credit value
Y/601/6556	Assist with Transfers	4

Group G

Unit reference number	Unit title	Credit value
T/601/6595	Build and Maintain Face-to-Face Relationships with Customers	5
F/601/6566	Sell Tourism-Related Products and Services	5
T/601/7214	Employment Rights and Responsibilities in the Hospitality, Leisure, Travel and Tourism Sector	2
M/601/1511	Resolve Customer Service Problems	6
D/601/5151	Process Travel & Tourism Services Payments	3
Y/601/5732	Identify and Provide Tourism-Related Information and Advice	5
D/601/5778	Plan and Conduct Welcoming Events	5
F/601/5949	Lead People on a Guided Tour	5
H/601/5782	Prepare and Maintain Holiday Accommodation	4
K/601/6559	Assist with Travel and Tourism Problems and Emergencies	4
A/601/6470	Present a Commentary for a Guided Tour	4

What is the qualification structure for the Pearson Edexcel Level 3 NVQ Diploma in Travel Services?

Individual units can be found in the *Units* section. The level and credit value are given on the first page of each unit.

The Total Qualification Time (TQT) for this qualification is 370.

The Guided Learning Hours for this qualification are 347.

To achieve this qualification, learners must achieve a minimum of 37 credits in total. 8 credits must be achieved from Group A and the remainder of the credits can be made up as follows, depending on the pathway.

Leisure and Business

A minimum of 10 credits from Group B. The remainder of the credits can be made up from Group B or D.

Tour Operators — Head Office

A minimum of 29 credits to be achieved from Group E.

Tour Operators — Field Staff

5 credits from Group C. The remainder of the credits must be made up from Group F.

Group A Mandatory units

Unit reference number	Unit title	Credit value
A/601/5867	Ensure Responsibility for Actions to Reduce Risks to Health and Safety	4
A/601/6601	Organise your Work and Personal Development	4

Leisure and Business pathway

Group B

Unit reference number	Unit title	Credit value
H/601/5149	Sell Travel-Related Products and Services	12
K/601/6576	Sell Multi-Sector Air Travel	12
T/601/6578	Sell Tailor-Made Travel Services	10

Group D

Unit reference number	Unit title	Credit value
D/601/6610	Build and Maintain Customers' Profiles	3
F/601/6440	Build and Maintain Relationships with Customers Not Present	6
L/601/6599	Contribute to Maintaining the Quality of Travel and Tourism Operations	5
T/601/6600	Contribute to Supporting and Developing Colleagues	6
T/601/7214	Employment Rights and Responsibilities in the Hospitality, Leisure, Travel and Tourism Sector	2
J/601/1515	Monitor and Solve Customer Service Problems	6
Y/601/5746	Complete Foreign Exchange Transactions	7
R/601/5776	Contribute to Business Travel Account Management	6
T/601/5785	Organise and Implement Travel and Tourism Promotional Activities	4
A/601/6548	Process Travel Services Bookings	5
D/601/6607	Obtain and Analyse Customer Feedback	4
T/601/6533	Generate Increased Travel and Tourism Sales	5
J/601/6536	Monitor Business Performance	4

Tour Operators — Head Office pathway

Group E

Unit reference number	Unit title	Credit value
D/601/6574	Analyse, Evaluate and Present Tourism Data	4
F/601/6440	Build and Maintain Relationships with Customers Not Present	6
L/601/6599	Contribute to Maintaining the Quality of Travel and Tourism Operations	5
T/601/6600	Contribute to Supporting and Developing Colleagues	6
F/601/9354	Monitor Procedures to Safely Control Work Operations	5
T/601/7214	Employment Rights and Responsibilities in the Hospitality, Leisure, Travel and Tourism Sector	2
J/601/1515	Monitor and Solve Customer Service Problems	6
H/601/5149	Sell Travel-Related Products and Services	12
K/601/6576	Sell Multi-Sector Air Travel	12

Unit reference number	Unit title	Credit value
T/601/5785	Organise and Implement Travel and Tourism Promotional Activities	4
A/601/6548	Process Travel Services Bookings	5
T/601/6578	Sell Tailor-Made Travel Services	10
M/601/6496	Deal with Travel and Tourism Problems and Emergencies	3
R/601/6510	Research and Develop Tour Itineraries	8
T/601/6533	Generate Increased Travel and Tourism Sales	5

Tour Operators — Field Staff pathway

Group C

Unit reference number	Unit title	Credit value
L/601/6599	Contribute to Maintaining the Quality of Travel and Tourism Operations	5

Group F

Unit reference number	Unit title	Credit value
T/601/6600	Contribute to Supporting and Developing Colleagues	6
K/601/6609	Plan and Deliver On-Site Entertainment	5
F/601/9354	Monitor Procedures to Safely Control Work Operations	5
T/601/7214	Employment Rights and Responsibilities in the Hospitality, Leisure, Travel and Tourism Sector	2
J/601/1515	Monitor and Solve Customer Service Problems	6
T/601/5785	Organise and Implement Travel and Tourism Promotional Activities	4
L/601/5789	Manage Accommodation and Transfers	3
M/601/6496	Deal with Travel and Tourism Problems and Emergencies	3
T/601/6516	Manage Delivery of a Tour	4
J/601/6536	Monitor Business Performance	4

How are the qualifications graded and assessed?

The overall grade for each qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- show that the evidence is their own.

The qualifications are designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment requirements/strategy for the sector, or
- as part of a training programme.

Assessment strategy

The assessment strategy for these qualifications has been included in *Annexe C*. It has been developed by People 1st in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment strategy includes details on:

- criteria for defining realistic working environments
- roles and occupational competence of assessors, expert witnesses, internal verifiers and standards verifiers
- quality control of assessment
- evidence requirements.

Evidence of competence may come from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the learner
Current	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
Reliable	indicates that the learner can consistently perform at this level
Sufficient	fully meets the requirements of the standards.

Types of evidence (to be read in conjunction with the assessment strategy in *Annexe C*)

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment strategy for information about which of the following are permissible.

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, where permitted by the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EPW)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Pearson standards verifier. A range of recording documents is available on the Pearson website qualifications.pearson.com. Alternatively, centres may develop their own.

Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Pearson approval are able to gain qualification approval for a different level or different sector via Edexcel online.

Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Pearson will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

Quality assurance

Detailed information on Pearson's quality assurance processes is given in *Annexe A*.

What resources are required?

Each qualification is designed to support learners working in the travel services sector. Physical resources need to support the delivery of the qualifications and the assessment of the learning outcomes and must be of industry standard. Staff assessing the learner must meet the requirements within the overarching assessment strategy for the sector.

Unit format

Each unit in this specification contains the following sections.

Unit title:

> This is the formal title of the unit that will appear on the learners certificate

Unit reference number:

> This code is a unique reference number for the unit.

Level:

> All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors by Ofqual, the qualifications regulator.

Credit value:

> All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.

Guided learning hours:

> Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

Unit summary:

> This provides a summary of the purpose of the unit.

Assessment requirements/evidence requirements:

> The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.

Assessment methodology:

> This provides a summary of the assessment methodology to be used for the unit.

Learning outcomes:	Assessment criteria:	Evidence type:	Portfolio reference:	Date:

> The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.

> The learner should give the date when the evidence has been provided.

> Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.

> The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.

> Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.

Units

Unit 1: Develop and Maintain Your Effectiveness at Work in a Travel and Tourism Environment

Unit reference number: D/601/9345

Level: 2

Credit value: 4

Guided learning hours: 25

Unit summary

This unit is about taking responsibility for improving your performance at work and working well with your colleagues so as to make a positive contribution to the overall effectiveness of your workplace.

Evidence requirements

LEARNING OUTCOME	Be able to improve personal performance at work
What you must **DO**	The assessor may assess assessment criteria 2.1-2.8 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	– at **least two** from **opportunities to learn**
	  a from other relevant people
	  b by active participation in training and development activities
	  c active participation in workplace activities
	– **both** from **targets**
	  a productivity
	  b personal development
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to work effectively as part of a team
What you must **DO**	The assessor must assess assessment criteria 4.1, 4.4 — 4.6 and 4.8 by directly observing the learner's work. The assessor may assess assessment criteria 4.2, 4.3, 4.7 through questioning or witness testimony.
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for: – **both** from **assistance** a on a one-to-one basis b in a group Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand own role and responsibilities	1.1	Outline own job role and responsibilities			
		1.2	State the standards of behaviour expected within the workplace			
		1.3	Explain the importance of meeting own work targets			
		1.4	Explain the importance of working within own job responsibilities			
		1.5	State the consequences of working outside own job responsibilities			
2	Be able to improve personal performance at work	2.1	Discuss own strengths and weaknesses with the relevant person			
		2.2	Seek additional information from relevant people when task instructions are unclear			
		2.3	Use feedback from relevant people to improve own performance			
		2.4	Request opportunities to learn from colleagues			
		2.5	Review developments and trends in travel and tourism services industry regularly			
		2.6	Agree realistic work targets with the relevant person			
		2.7	Review progress of work targets with the relevant person regularly			
		2.8	Update personal development plan regularly			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to improve personal performance at work	3.1	Describe how own strengths and weaknesses can be identified			
		3.2	Describe questioning and listening skills needed in order to obtain information on personal performance			
		3.3	Describe how using the National Occupational Standards for travel and tourism services can help identify development needs			
		3.4	State how to access information on National Occupational Standards and qualifications relevant to travel and tourism			
		3.5	Explain the importance of maintaining an awareness of current and emerging trends and developments within the industry			
		3.6	Describe how to maintain awareness of current and emerging trends and developments within the industry			
		3.7	Explain the importance of reacting positively to reviews and feedback			
		3.8	Describe how to react positively to reviews and feedback			
		3.9	State own productivity targets and timescales			
		3.10	State personal development targets and timescales			
		3.11	Explain the importance of continually using and updating own personal development plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		3.12	Explain the importance of continuous professional development			
		3.13	Describe how continuous professional development affects own job role			
		3.14	Identify relevant people that can help with professional development			
4	Be able to work effectively as part of a team	4.1	Agree ways of working together to achieve objectives			
		4.2	Request help and information from colleagues when necessary			
		4.3	Respond to requests for assistance from colleagues			
		4.4	Offer assistance to others when needed			
		4.5	Use time effectively throughout the working day			
		4.6	Report problems that are likely to affect travel and tourism services to the relevant person promptly			
		4.7	Resolve any misunderstanding with colleagues promptly			
		4.8	Ensure contact with colleagues is friendly, helpful and respectful			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know how to work effectively as part of a team	5.1 State how to find out relevant information about other peoples' areas of responsibility			
	5.2 Describe how own job role relates to others in the team			
	5.3 Outline limits of own job role and of others in relation to giving assistance			
	5.4 Describe how to manage time effectively			
	5.5 Explain the importance of good working relationships			
	5.5 Explain how to support co-operative ways of working			
	5.6 Describe how to deal with relationship difficulties and conflicts when working with others			
	5.7 Identify who to report relationship difficulties and conflicts in the workplace to			
	5.8 Explain grievance and appeal procedures			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 2: Ensure Responsibility for Actions to Reduce Risks to Health and Safety

Unit reference number:	A/601/5867
Level:	3
Credit value:	4
Guided learning hours:	38

Unit summary

The aim of this unit is to provide learners with the knowledge/understanding/skills to understand their health and safety responsibilities in the workplace.

Evidence requirements

1 The common evidence requirements below are in addition to the ENTO Assessment Strategies approved by UKCG in February 2008.

2 The standards require evidence of consistent occupational competence, as defined by the standards, to be demonstrated through relevant work activities. A variety of assessment methods should be used to confirm competence. Assessment of knowledge should be integrated with the assessment of performance wherever possible and appropriate.

3 Assessment of performance and knowledge in the workplace: All evidence must be derived from performance in the workplace with no exceptions. Therefore, **no simulated working conditions** have been specified in this Assessment Strategy as the outcomes can be demonstrated by a combination of other assessment methods drawn

from:

- direct observation of the candidate in the workplace
- witness testimony by colleagues and line managers of the candidate's successful performance of activities in the workplace
- documentary and other product-based evidence
- a personal report by the candidate endorsed by colleagues
- questions
- discussion
- professional discussion.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to identify the hazards and evaluate the risks in the workplace	1.1	Identify workplace instructions that are relevant to them and their job role			
		1.2	Identify working practices and hazards in the workplace that could be harmful			
		1.3	Evaluate the hazards and prioritise in risk order			
		1.4	Report hazard(s) to the responsible person			
2	Be able to reduce the risks to health and safety in the workplace	2.1	Perform work activities at own level of competence in accordance with identified health and safety: – workplace policies – instructions and procedures – suppliers and manufacturers' information and – relevant legal requirements			
		2.2	Manage hazards in accordance with workplace instructions and legal requirements			
		2.3	Report any differences between workplace instructions and supplier/manufacturer instructions			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to reduce risks to health and safety in the workplace	3.1 Explain their responsibility in remaining alert to hazards and risks			
	3.2 Describe own responsibilities and scope for action in controlling risk			
	3.3 Explain the importance of adhering to health and safety policies and practices			
	3.4 Describe where and when to get additional health and safety assistance			
	3.5 Describe the importance of personal presentation and behaviour in maintaining health and safety in the workplace			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 3: Give Customers a Positive Impression of Yourself and Your Organisation

Unit reference number:	L/601/0933
Level:	2
Credit value:	5
Guided learning hours:	33

Unit summary

Excellent customer service is provided by people who are good with people. The learner's behaviour affects the impression that customers have of the service they are receiving. This unit is about communicating with the customers and giving a positive impression whenever dealing with a customer. By doing this the learner can create a positive impression of the organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us and gives us good information. Every detail of the learners' behaviour counts when dealing with a customer.

Assessment requirements/evidence requirements

1   Wherever possible the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

2   The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3   The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

4   The learner's communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method they would be expected to use within their job role.

5   The learner must provide evidence of creating a positive impression with customers:

    a   during routine delivery of customer service

    b   during a busy time in their job

    c   during a quiet time in their job

d when people, systems or resources have let them down.

6   The learner must provide evidence that they communicate with customers effectively by:

a using appropriate spoken or written language

b applying the conventions and rules appropriate to the method of communication they have chosen.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Establish rapport with customers	1.1	Meet their organisation's standards of appearance and behaviour			
		1.2	Greet their customer respectfully and in a friendly manner			
		1.3	Communicate with their customer in a way that makes them feel valued and respected			
		1.4	Identify and confirm their customer's expectations			
		1.5	Treat their customer courteously and helpfully at all times			
		1.6	Keep their customer informed and reassured			
		1.7	Adapt their behaviour to respond to different customer behaviour			
2	Respond appropriately to customers	2.1	Respond promptly to a customer seeking help			
		2.2	Choose the most appropriate way to communicate with their customer			
		2.3	Check with their customer that they have fully understood their expectations			
		2.4	Respond promptly and positively to their customer's questions and comments			
		2.5	Allow their customer time to consider their response and give further explanation when appropriate			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Communicate information to customers	3.1 Quickly find information that will help their customer			
	3.2 Give their customer information they need about the services or products offered by their organisation			
	3.3 Recognise information that their customer might find complicated and check whether they fully understand			
	3.4 Explain clearly to their customers any reasons why their expectations cannot be met			
4 Understand how to give customers a positive impression of themselves and the organisation	4.1 Describe their organisation's standards for appearance and behaviour			
	4.2 Explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately			
	4.3 Identify their organisation's rules and procedures regarding the methods of communication they use			
	4.4 Explain how to recognise when a customer is angry or confused			
	4.5 Identify their organisation's standards for timeliness in responding to customer questions and requests for information			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 4: Arrange Non Multi-Sector Air Travel

Unit reference number: D/601/6560

Level: 2

Credit value: 5

Guided learning hours: 43

Unit summary

This unit supports workforce development for those who arrange non multi-sector air travel for travellers.

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

Evidence requirements

LEARNING OUTCOME	Be able to administer customers' air travel bookings
What you must **DO**	The assessor must assess assessment criteria 3.1-3.8 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **one** from **terms and conditions**
	   a insurance requirements
	   b itinerary
	   c restrictions
	– at least **two** from **air travel services**
	   a charter flight
	   b no frills flight
	   c consolidated flights
	   d other scheduled services
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to complete booking documentation
What you must **DO**	The assessor may assess assessment criteria 4.1-4.3 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of air travel	1.1	Summarise the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers			
		1.2	Outline a travel agent's main responsibilities under current industry codes of practice			
		1.3	Summarise the legal obligations for advising customers on air travel services			
		1.4	Explain the roles and responsibilities of major air travel organisations			
2	Understand the principles of dealing with customers	2.1	Explain why it is important to show an interest in the customer by displaying a professional attitude			
		2.2	Explain why it is important to demonstrate knowledge and experience to the customer			
		2.3	Explain the importance of listening carefully to customers			
		2.4	Explain why it is important to ensure that information provided to customers is accurate and up to date			
		2.5	Explain the importance of accurately recording customer information			
		2.6	Explain the need for confidentiality and the implications of the data protection legislation			
		2.7	Identify relevant air travel insurance requirements			
		2.8	Know how and when to use open and closed questioning			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.9 Describe how to ask customers about passports and visas			
	2.10 Identify suitable information to give customers regarding current, mandatory and recommended health precautions			
	2.11 Describe the importance of adhering to organisational procedures relating to the sale of air travel services			
	2.12 Ensure customers are aware of all relevant booking conditions and restrictions			
	2.13 Compare the different entry requirements for EU and non-EU passport holders to major tourist destinations world wide			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to administer customers' air travel bookings	3.1	Accurately summarise and confirm the customer's needs with them			
		3.2	Advise customers of the total cost of their booking			
		3.3	Explain any applicable booking restrictions to the customer			
		3.4	Ensure that necessary records of customer enquiries are complete, accurate and correctly stored			
		3.5	Seek customers' agreement to the terms and conditions prior to confirming the booking			
		3.6	Confirm bookings for air travel services that accurately match the details agreed with the customer			
		3.7	Process all booking administration promptly, correctly and following the organisational and supplier's procedures			
		3.8	Store booking information and documentation securely following your organisational procedures and legal requirements			
4	Be able to complete booking documentation	4.1	Accurately explain applicable ticketing and payment arrangements following organisational and supplier's procedures			
		4.2	Issue correct copies of booking documents to the relevant person(s), where required			
		4.3	Complete all customer records fully and accurately and pass them to the relevant person(s) promptly			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know non multi-sector air travel information	5.1 Identify the names and location of continents and countries			
	5.2 Identify the location of major world tourist attractions and special events			
	5.3 Describe how travel between different time zones can have an impact on the customer			
	5.4 Describe how to use and interpret relevant air travel information and where to obtain it			
	5.5 Describe the main types of air travel products and suppliers			
	5.6 Describe travel organisations their roles including: – ATOL – CAA – IATA			
	5.7 Recite the phonetic alphabet			
	5.8 Describe what is meant by scheduled and charter flights			
	5.9 Encode and decode airline and airport codes			
	5.10 Describe airport departure and ticketing taxes and other service charges			
	5.11 Describe how to calculate check-in times, terminal information and elapsed journey times			
	5.12 Identify the free baggage allowances for the airlines			
	5.13 Describe how to read maps to identify the location of major airports, destinations, major cities and country groups			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.14 Describe how to identify and interpret booking conditions and specific restrictions relating to the air travel products and services			
	5.15 Describe the consequences of misrepresentation			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 5: Help Customers to Choose and Book Travel Services

Unit reference number: M/601/6580

Level: 2

Credit value: 16

Guided learning hours: 120

Unit summary

This unit supports workforce development for those who help customers make travel bookings for customers who have a clear idea of what they need, eg travel only, package holiday.

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

Evidence requirements

LEARNING OUTCOME	Be able to help customers select travel services to meet their needs
What you must **DO**	The assessor must assess assessment criteria 2.1-2.3 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	• at least **three** from **travel needs**
	    a **package holidays**
	    b **accommodation only**
	    c **ferry travel only**
	    d **flight only**
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to capture and process customer information
What you must **DO**	The assessor must assess assessment criteria 5.1 and 5.3-5.5 by directly observing the learner's work.
	The assessor may assess assessment criterion 5.2 through questioning, witness or other documentary evidence demonstrating competence.
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **one** from **customers**
	a **individual**
	b **organisation**
	c **small group**
	– at least **one** from **record**
	a **manually**
	b **electronically**
	– at least **one** from **information**
	a **customer contact details**
	b **product enquiries**
	c **relevant interests**
	– at least **one** from **processed and stored**
	a **manually**
	b **electronically**
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to complete travel services bookings
What you must **DO**	The assessor must assess assessment criteria 7.1-7.4 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	   – at least **three** from **travel services**
	     a package holidays
	     b accommodation only
	     c ferry travel only
	     d flight only
	   – at least **three** from **additional services**
	     a car hire
	     b transport to and from departure point
	     c car parking
	     d insurance
	     e tour operators extras
	     f mobility requirements
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to process post-booking documentation
What you must **DO**	The assessor must assess assessment criteria 10.1-10.4 by directly observing the learner's work.
LEARNING OUTCOME	Be able to receive, prepare and issue travel documentation
What you must **DO**	The assessor may assess assessment criteria 11.1-11.7 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	   – at least **three** from **travel services**
	     a package holidays
	     b accommodation only
	     c ferry travel only
	     d flight only
	   – at least **one** from **tickets**
	     a pre-issued
	     b tickets on departure (TOD)
	     c e-tickets
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of helping customers choose and book travel services	1.1 Explain why customer confidentiality must be maintained			
	1.2 Explain why it is important to ensure that information provided to customers is accurate and up to date			
	1.3 Explain the importance of accuracy and security in keeping records of bookings			
	1.4 Describe the consequences of misrepresentation during discussions with customers			
	1.5 Describe the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers			
	1.6 Describe the value of customer information in: – establishing current trends in travel and tourism customers' wants and needs – tailoring offers to specific customers' profiles – maintaining contact with customers and building customer loyalty			
	1.7 Explain the main requirements of legislation affecting the collection, storage and use of personal information			
	1.8 Explain the importance of following organisational systems for recording and processing information			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to help customers select travel services to meet their needs	2.1 Use suitable techniques to identify, clarify and summarise customers' travel needs 2.2 Calculate total costs of travel arrangements 2.3 Obtain customer's acceptance of the proposed arrangements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know about world-wide travel destinations	3.1 Identify the location of the most visited outbound destinations in the world for UK visitors			
	3.2 Identify the location of major tourist attractions and special events in the UK, Europe and throughout the world			
	3.3 Identify the types of currency in use in major tourist destinations worldwide			
	3.4 Identify the official languages in use in major tourist destinations worldwide			
	3.5 Describe the types of climate found in major tourist destinations worldwide			
	3.6 Identify world time zones and describe their impact on customers			
	3.7 Describe passport and visa types			
	3.8 Identify where to find information on visa and passport entry requirements			
	3.9 Identify what information to give customers to enable them to find out current mandatory and recommended health precautions and regulations			
	3.10 Describe the different entry requirements for EU and non-EU passport holders to major tourist destinations worldwide			
	3.11 Explain how to read and interpret maps to identify major seaports and airports, tourist destinations, capital cities, major cities and country groups in the UK, Europe and throughout the world			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
4 Know about travel services	4.1	Describe the elements that make up travel packages			
	4.2	Describe the organisation's position on preferred operators			
	4.3	Explain car rental terms and abbreviations			
	4.4	Describe the main conditions of car rental including eligibility (eg age, endorsements)			
	4.5	Describe the car insurance provision offered by the car hire suppliers used by the organisation, including collision damage waiver, personal accident insurance and top ups			
	4.6	Identify sources of information on major parking operators at the main UK airports			
	4.7	Identify sources of information on airport taxi and transport arrangements to major UK departure points			
	4.8	Describe types of travel insurance available including amounts of cover, conditions, exclusions and excesses			
	4.9	Explain what ATOL stands for			
	4.10	Describe ATOL protection and identify which products are and are not covered			
	4.11	Describe the meaning of basic terms and abbreviations used on travel documentation			
	4.12	Describe the booking terms and conditions and any restrictions applying to travel and additional services			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		4.13	Identify 3-letter airport codes and describe how to encode and decode them			
		4.14	Describe the types of tickets available for travel services and any conditions attached to their issue			
		4.15	Identify where to find accurate and up to date information to support booking			
5	Be able to capture and process customer information	5.1	Obtain customer consent to record the necessary information			
		5.2	Maintain good customer relations when objections to personal information being recorded are raised			
		5.3	Record customer information quickly and in the correct format			
		5.4	Process and store customer information to meet organisational and legal requirements			
		5.5	Maintain the confidentiality of customer information			
6	Know how to capture and process customer information	6.1	Identify what information needs to be captured to meet company needs			
		6.2	Describe how information must be captured, processed and stored to meet organisation and legal requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
7	Be able to complete travel services bookings	7.1	Process bookings for travel and any additional services that match the details agreed with the customer			
		7.2	Process bookings in accordance with organisational procedures and to meet legal and regulatory requirements			
		7.3	Complete all travel booking administration promptly and correctly following organisational procedures			
		7.4	Store booking information and documentation securely following organisational procedures and legal requirements			
8	Know how to complete travel services bookings	8.1	Describe your organisation's procedures relating to the sale of travel services and insurance and the importance of following them			
		8.2	Describe how to present costing to customers			
		8.3	Explain relevant booking conditions and restrictions so that they are understood by customers			
		8.4	Describe how to use and interpret reference sources to provide information and costings for different customer groups and pricing tariffs			
		8.5	Describe how and when to question customers about passports and visas and any health requirements			
		8.6	Describe how to determine customers' eligibility for different insurance products			
		8.7	Describe how to interpret the travel arrangement information on travel documentation			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	8.8	Describe organisational procedures for completing and processing manual and/or computer bookings, processing booking documentation and monitoring and logging bookings			
	8.9	Describe organisational procedures for the distribution and storage of booking documentation			
	8.10	Identify the types of travel documentation that can be issued and completed in the workplace			
	8.11	Describe how to complete suppliers' manual or electronic booking documentation			
	8.12	Explain how to use the phonetic alphabet			
	8.13	Describe how to complete tickets, vouchers and associated documentation			
	8.14	Describe how to ensure tickets, vouchers and associated documentation are accurate			
9 Understand the importance of accuracy and security in making travel bookings for customers	9.1	Describe the consequences of making booking errors			
	9.2	Describe the consequences of incorrectly issuing and processing documents			
	9.3	Describe how customer information is obtained, recorded and stored to maintain confidentiality and security			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
10	Be able to process post-booking documentation	10.1	Ensure bookings have supplier confirmation that matches the services booked			
		10.2	Issue the correct copies of booking documents to the relevant persons			
		10.3	Update booking documentation promptly and accurately			
		10.4	Refer all matters outside responsibilities to the relevant person			
11	Be able to receive, prepare and issue travel documentation	11.1	Ensure that all documentation received matches the travel services booked			
		11.2	Deal with any discrepancies in travel documentation promptly and appropriately before issuing them to customers			
		11.3	Assemble all necessary documents and tickets accurately			
		11.4	Issue travel documents to customers promptly and following the organisation's procedures			
		11.5	Explain and reconfirm travel booking details with customers			
		11.6	Confirm customers understanding and satisfaction with travel services booked			
		11.7	Complete and update customer records fully and accurately before promptly passing them on to the relevant person(s)			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
12 Know how to receive, prepare and issue travel documentation	12.1 Describe methods of making documents available to customers 12.2 Describe your organisation's procedures for hand-over of travel documentation 12.3 Identify the limits of your responsibility for handling documentation discrepancies and to whom you should report any problems			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 6: Build and Maintain Face-to-Face Relationships with Customers

Unit reference number:	T/601/6595
Level:	2
Credit value:	5
Guided learning hours:	42

Unit summary

This unit supports workforce development for those who greet customers in retail travel agencies and on behalf of tour operators.

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

Evidence requirements

LEARNING OUTCOME	Be able to greet customers face to face
What you must **DO**	The assessor must assess assessment criteria 2.1-2.5 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	  – at least **one** from **greet**
	    a in person
	  – **both** from **confidentiality**
	    a **of organisation information**
	    b **of customer information**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to establish rapport with customers
What you must **DO**	The assessor must assess assessment criteria 3.2 and 3.3 by directly observing the learner's work.
	The assessor may assess assessment criteria 3.1 and 3.4 through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **two** from **pitch**
	a **vocabulary used**
	b **speed of speech**
	c **use of technical language**
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
LEARNING OUTCOME	Maintain and build established relationships with customers
What you must **DO**	The assessor must assess assessment criteria 4.2-4.6 by directly observing the learner's work.
	The assessor may assess assessment criterion 4.1 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of face-to-face relationships with customers	1.1 Explain the importance of listening and building rapport			
	1.2 Explain the importance of following up calls/meetings			
	1.3 Describe the influence of different cultures and backgrounds on face-to-face relationships			
	1.4 Explain the importance of complying with equality requirements when serving customers with specific needs			
2 Be able to greet customers face-to-face	2.1 Acknowledge and greet customers promptly and in accordance with company policies			
	2.2 Establish customers' needs and wants quickly and sensitively			
	2.3 Refer customers promptly to more appropriate members of staff where necessary and explain the reasons for referral			
	2.4 Maintain necessary confidentiality			
	2.5 Acknowledge customers where delay in greeting is unavoidable and, where possible, give apologies			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to establish rapport with customers	3.1	Establish customers' confidence in your professionalism			
		3.2	Use appropriate language and gestures to suit the needs of customers			
		3.3	Speak clearly to customers and pitched communication to suit their needs			
		3.4	Ensure that customers feel at ease			
4	Be able to maintain and build established relationships with customers	4.1	Greet returning customers by name where appropriate			
		4.2	Establish and confirm customers' needs before taking appropriate action			
		4.3	Take appropriate opportunities to confirm mutual understanding of customers' needs and potential means of meeting them			
		4.4	Maintain goodwill by explaining any delay in responding to customers' needs			
		4.5	Carry out any undertakings made to customers within the promised time			
		4.6	Update customer records accurately and promptly			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know how to maintain and build face-to-face relationships with customers	5.1 Describe the effects of body language 5.2 Illustrate variations in the language to use when speaking to different customers 5.3 Describe how to greet people formally and informally 5.4 Describe how to treat guest as individuals 5.5 Describe how to relate information to customers 5.6 Summarise the organisation's policies on greeting and communicating with customers face-to-face 5.7 Identify the organisation's requirements concerning customer records			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 7: Set Up and Maintain Promotional Displays

Unit reference number: F/601/6552

Level: 2

Credit value: 4

Guided learning hours: 27

Unit summary

This unit supports workforce development for those who set up and maintain promotional displays.

The unit is designed for use primarily by travel agency and tourist information staff and others who carry out these workplace activities.

The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to make preparations for promotions
What you must **DO**	The assessor may assess assessment criteria 2.1-2.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	– **all** from **requirements for the promotion**
	  a **stock and space**
	  b **display position and dates**
	  c **safety and security**
	  d **organisational standards for promotional materials**
	– **all** from **instructions**
	  a **content**
	  b **deadlines**
	  c **position**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to set up, maintain and remove promotional materials
What you must **DO**	The assessor must assess assessment criteria 3.2 – 3.4 by directly observing the learner's work.
	The assessor may assess assessment criteria 3.1, 3.5 and 3.6 through questioning, witness or other documentary evidence demonstrating competence
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **three** from **promotional materials**
	a brochures
	b posters
	c stickers
	d cards
	e labels
	f leaflets
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of promotional materials	1.1	Explain why promotional materials should be up-to-date and easily accessed			
		1.2	Explain the potential consequences of passing on out-of-date information in a promotional materials			
		1.3	Explain the importance of displays when promoting travel and tourism products and services			
		1.4	Explain why it is important to check the accuracy and legality of information on promotional materials			
		1.5	Describe how to check the accuracy and legality of information on promotional materials			
		1.6	Explain why it is important to check for potential health and safety hazards before, during and after the setting up of displays			
2	Be able to make preparations for promotions	2.1	Confirm the requirements for the promotion			
		2.2	Clarify if information regarding the promotion if not complete or clear			
		2.3	Ensure that the intended display area is the right size and does not affect access			
		2.4	Ensure that materials, equipment and stock required for the display are available, clean, up-to-date, safe and in good working order			
		2.5	Clear, clean and prepare the display area properly before use			
		2.6	Produce cards and posters that are legible and match the instructions provided and the organisation's house style and standard required			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to set up, maintain and remove promotional materials	3.1	Set up and remove promotional materials correctly within the agreed timescale			
		3.2	Maintain displays in a clean, tidy and safe condition throughout the promotional period			
		3.3	Maintain the required levels and type of stock on display throughout the promotional period			
		3.4	Ensure that information is up-to-date and in good condition at all times			
		3.5	Return equipment and excess materials to storage			
		3.6	Safely dispose of any materials that are out-of-date, damaged or no longer needed following your organisational waste disposal procedures			
4	Know how to set up and maintain promotional displays	4.1	Explain the importance of ensuring information supplied is correct and complies with relevant, current legislation			
		4.2	Summarise the relevant health and safety legislation relating to the storage and lifting of materials			
		4.3	Explain why it is important to clean any materials and equipment used in displays and dispose of waste materials safely and in an environmentally friendly way			
		4.4	Describe how to check health and safety hazards and how to use any display equipment safely, including checks on its working order			
		4.5	Describe how to store promotional materials safely and keep them in good condition			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.6 Explain how placing items in specific places attracts attention and promotes sales			
	4.7 Describe how to use space effectively when displaying items			
	4.8 Outline organisational requirements for – standards for promotions, their maintenance and removal – minimum stock levels for all promotional materials – corporate image and house style of locally made cards and posters – the disposal of out-of-date promotional materials			
	4.9 Identify own responsibilities for maintaining minimum stock levels of promotional materials			
	4.10 Describe how to check that all displayed items are accurate and up-to-date and conform to organisational requirements			
	4.11 Identify the instructions for specific promotional activities and where to access information on current promotional activities			
	4.12 Describe the organisation image and professional branding			

Unit 8: Employment Rights and Responsibilities in the Hospitality, Leisure, Travel and Tourism Sector

Unit reference number:	T/601/7214
Level:	2
Credit value:	2
Guided learning hours:	16

Unit summary

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

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know employer and employee rights, responsibilities and own organisational procedures	1.1	State employer and employee rights and responsibilities under employment law, including Disability Discrimination Act, Health & Safety and other relevant legislation			
		1.2	State importance of having employment rights and responsibilities			
		1.3	Describe organisational procedures for health & safety, including documentation			
		1.4	Describe organisational procedures for equality & diversity, including documentation			
		1.5	Identify sources of information and advice on employment rights and responsibilities, including Access to Work and Additional Learning Support			
2	Know factors that affect own organisation and occupation	2.1	Describe the role played by own occupation within organisation and industry			
		2.2	Describe career pathways available to them			
		2.3	State types of representative body related to the industry, their main roles and responsibilities and their relevance to the industry			
		2.4	Identify sources of information and advice on own industry, occupation, training and career			
		2.5	Describe principles, policies and codes of practice used by own organisation and industry			
		2.6	Describe issues of public concern that affect own organisation and industry			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 9:   Process Travel and Tourism Services Payments

Unit reference number: D/601/5151

Level: 2

Credit value: 3

Guided learning hours: 20

Unit summary

This unit supports workforce development for those who are engaged in the receipt of different types of payment by a variety of means through direct contact with customers.

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

Evidence requirements

LEARNING OUTCOME	Be able to receive payments
What you must **DO**	The assessor must assess assessment criteria 2.1, 2.2 and 2.4-2.6 by directly observing the learner's work. The assessor may assess assessment criterion 2.3 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	 – at least **three** from **methods of payment**
	     a **credit card**
	     b **debit card**
	     c **personal cheque**
	     d **traveller's cheques**
	     e **vouchers**
	     f **cash**

	− at least **two** from **payment discrepancies**
	a out of date card
	b card not authorised
	c fraudulent use of card
	d incorrectly complete cheques
	e incorrect cash amounts
	f seemingly counterfeit notes
	g notes out of circulation
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
LEARNING OUTCOME	**Be able to issue receipts and store payments**
What you must **DO**	The assessor must assess assessment criteria 3.1-3.3 by directly observing the learner's work or other documentary evidence demonstrating competence
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	− **both** from **protected**
	a from loss
	b from theft
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of processing travel and tourism payments	1.1 Explain the importance of following procedures when receiving and receipting payments from customers			
	1.2 Describe relevant current currency control regulations applicable to payments for foreign exchange including money laundering provisions			
	1.3 Describe potential consequences of incorrect calculations and payments			
	1.4 Describe the risks associated with transactions when the cardholder is not present and how to reduce the risk			
	1.5 Describe duties and responsibilities in current industry legislation and codes of practice			
	1.6 Describe the levels of authority for handling non-cash payments and dealing with payment discrepancies			
	1.7 Describe code ten and conventional authorisation procedures			
	1.8 Describe the organisation's accepted payment methods			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to receive payments	2.1	Ensure that customers are aware of the final total amount to be paid			
		2.2	Ensure that customers are aware of the methods of payment that are acceptable, and any charges or restrictions that may be attached			
		2.3	Follow the organisation's policies and procedures regarding payment discrepancies, non-cash payments, transaction values, and limits			
		2.4	Provide accurate change for cash payments			
		2.5	Maintain the security of cash and other payments			
		2.6	Use correct procedures to maintain confidentiality of customers' purchases and payment information			
3	Be able to issue receipts and store payments	3.1	Complete all internal payment records accurately following the organisation's procedures			
		3.2	Provide customers with legible and accurate receipts			
		3.3	Securely store and protect all payments			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Know how to receive payments	4.1	Describe the legislative requirements relating to processing payments and recording customers' information			
		4.2	Identify the differences between charge, credit and debit cards			
		4.3	Identify types of fraudulent card transactions			
		4.4	Explain the charge back process			
		4.5	Describe how to handle customers when dealing with payment discrepancies			
		4.6	Describe how to calculate amounts due correctly			
		4.7	Identify the relevant person for information, advice or payment authorisation			
		4.8	Identify the charges that apply to different methods of payment and the implications to the customer and organisation			
5	Know how to issue receipts and store payments	5.1	Describe organisational procedures for receiving, handling and receipting payments			
		5.2	Describe organisational procedures for storing payments			
		5.3	Explain organisational procedures for dealing with payment discrepancies			
		5.4	Describe how to complete payment related documentation according to organisational procedures			
		5.5	Explain organisational procedures in emergency situations relating to payments			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 10: Assist Customers Prior to and After Travelling

Unit reference number: T/601/5723

Level: 2

Credit value: 4

Guided learning hours: 32

Unit summary

This unit supports workforce development for those staff in contact with customers and responsible for customer bookings, and any queries about bookings or changes that may need to be made. The unit is designed for use primarily by agents in both leisure and business travel and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to resolve customers' queries about their bookings
What you must **DO**	The assessor must assess assessment criteria 2.1-2.5 by directly observing the learner's work or other documentary evidence demonstrating competence

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	 – at least **one** from **queries**
	
	   a **non arrival of documents**
	
	   b **incomplete and/or incorrect documentation**
	
	   c **requests for additional information**
	
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to identify and make changes to bookings
What you must **DO**	The assessor must assess assessment criteria 3.1-3.5 by directly observing the learner's work or other documentary evidence demonstrating competence

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	− at least **five** from **changes**
	   a transport times
	   b destination
	   c accommodation
	   d date of departure
	   e date of return
	   f length of trip
	   g departure point
	   h name
	   i cancellation by supplier
	   j cancellation by customer
	
	− at least **two** from **financial implications**
	   a additional payment required by the customer
	   b amendment charge payable by the customer
	   c compensatory payment made to the customer
	   d refund payable to the customer
	
	− at least **three** from **procedures**
	   a completion of documents
	   b timescale for return of documents
	   c items to be enclosed with claims
	   d covering letters
	   e where to submit claims
	   f follow up
	   g further courses of action
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	**Be able to advise customers on how to make travel-related claims and complaints**
What you must **DO**	The assessor may assess assessment criteria 4.1-4.5 through questioning, witness testimony or other documentary evidence demonstrating competence

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of assisting customers	1.1	Explain the importance of clear and accurate communication			
		1.2	Explain the consequences of failing to complete all actions, promptly and correctly			
		1.3	Explain why it is important to explain all of the available alternatives			
		1.4	Explain the importance of handling changes, customer queries, claims and complaints in a way that maintains goodwill and the organisation's public image			
2	Be able to resolve customers' queries about their bookings	2.1	Ensure that customers are informed about any implications arising from their queries			
		2.2	Provide accurate and complete information to resolve customer queries			
		2.3	Offer customers a range of suitable courses of action and reassurance where necessary			
		2.4	Confirm customers' consent before taking any course of action to resolve queries			
		2.5	Implement any agreed course of action to resolve queries promptly and accurately			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to identify and make changes to bookings	3.1	Inform customers promptly and accurately of the implications of any changes to their booking			
		3.2	Offer customers a range of suitable alternative courses of action to resolve any problems			
		3.3	Make agreed changes to bookings and update all records promptly and accurately			
		3.4	Communicate with suppliers professionally at all times			
		3.5	Issue customers with suitably amended documentation within the required time scale following organisational procedures			
4	Be able to advise customers on how to make travel-related claims and complaints	4.1	Explain travel related claims and complaints procedures to customers			
		4.2	Ensure that customers fully understand the processes they need to follow			
		4.3	Answer customers' questions correctly			
		4.4	Issue the correct documentation			
		4.5	Check that customers are satisfied with the service			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Know how to assist customers prior to and after travelling	5.1	Describe extent of authority when handling queries and changes to bookings			
		5.2	Identify whom to refer any matters to which are outside work responsibilities or experience			
		5.3	Describe relevant travel service booking conditions			
		5.4	Describe the courses of action that can be offered to resolve customers' queries and changes			
		5.5	Describe how to question customers to find out what alternatives will meet their needs			
		5.6	Describe legal obligations when advising customers, including general requirements of package holiday legislation			
		5.7	Describe a travel agent's main responsibilities under current industry legislation and codes of practice for handling booking changes, queries and advising on claims and complaints procedures			
		5.8	Explain additional payments, refunds, amendment charges, cancellation charges and compensatory payments to customers			
		5.9	Explain any additional changes, the reasons for them and possible courses of action			
		5.10	Describe how to seek and obtain customer agreement to a particular course of action			
		5.11	Describe how to action changes to bookings initiated by the organisation and customers			
		5.12	Explain how to adapt communication methods to suit the different needs of customers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.13 Describe organisational procedures for: – making changes to customer bookings – handling booking and other queries – completing customers' records 5.14 Describe how to access original booking details, identify and record the changes required 5.15 Identify what documents need to be completed, how to complete them and what happens to them 5.16 Describe organisational procedures and documentation for claims and complaints for suppliers 5.17 Describe how to communicate effectively with customers and suppliers			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 11:   Research Travel and Destination Information

Unit reference number:	L/601/5727
Level:	2
Credit value:	3
Guided learning hours:	18

Unit summary

This unit supports workforce development for those who are responsible for keeping travel and destination information up to date and accurate. The unit is designed for use primarily by travel agents, tourist information staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	**Be able to research travel destination and product information**
What you must **DO**	The assessor may assess assessment criteria 2.1-2.8 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **one** from **travel destinations**
	a **domestic**
	b **overseas**
	– at least **two** from **products**
	a **attractions**
	b **local transport**
	c **tourist facilities**
	– at least **one** from **recorded**
	a **manually**
	b **electronically**
	– at least **one** from **sources**
	a **printed**
	b **electronic**
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of selling multi-sector air travel	1.1 Explain the importance of collecting and recording data and information accurately			
	1.2 Explain the importance of ensuring that data and information sources are reliable and current			
	1.3 Explain why items of data and information are needed and how they will be used			
	1.4 Explain why it is necessary to highlight gaps in sets of data and how such gaps can impact on conclusions			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to research travel destination and product information	2.1	Collect useful data and information relating to travel destinations and products			
		2.2	Use reliable sources of information that meet given research objectives			
		2.3	Collect data and information using a variety of suitable methods to meet organisational requirements			
		2.4	Record gaps in sets of data and assess their impact on conclusions			
		2.5	Collect data and information at times and frequencies to meet research objectives			
		2.6	Ensure that all data and information collected is accurate and up to date			
		2.7	Accurately record data and present information in the required format			
		2.8	Ensure data is stored securely using the organisation's information system(s) correctly and is available to appropriate colleagues			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to research travel destination and product information	3.1 Describe methods of collecting data and information and their advantages and disadvantages			
	3.2 Describe how to gather information from telephone calls, face to face conversations, printed documents, electronic and on-line sources			
	3.3 Explain how to check the validity and currency of data and information			
	3.4 Identify where to access and when to use reliable data and information			
	3.5 Explain how to use electronic inputting and recording systems			
	3.6 Identify when to seek additional sources to verify information			
	3.7 Explain how support can be obtained to deal with verification problems			
	3.8 Describe the variety of topics on which customers typically require information			
	3.9 Explain how to use organisational data and information systems			
	3.10 Outline organisational requirements and procedures for: – recording and storing data and information – processing data and information – presenting the outcomes of research – disposal of data which is inaccurate, out-of-date or irrelevant			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 12:   Identify and Provide Tourism-Related Information and Advice

Unit reference number: Y/601/5732

Level: 2

Credit value: 5

Guided learning hours: 37

Unit summary

This unit supports workforce development for those who provide tourism-related information and advice for visitors, eg travel agents, tour operators, resort staff guides and tourist information staff. The unit is designed for use primarily by staff whose role entails providing information and advice and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to identify customers' information and advice needs
What you must **DO**	The assessor may assess assessment criteria 2.1-2.4 through questioning, witness testimony or other documentary evidence demonstrating competence.
LEARNING OUTCOME	**Be able to source relevant tourism-related information and advice**
What you must **DO**	The assessor may assess assessment criteria 4.1-4.3 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **five** from **information sources**
	a organisation specific reference materials
	b electronic sources
	c brochures
	d directories
	e timetables
	f maps
	g guidebooks
	h external organisations
	i other colleagues
	j leaflets
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of providing tourism-related information and advice	1.1 Explain why it is important to identify and interpret customers' needs			
	1.2 Explain why it is essential to clarify the detail of a customer's needs			
	1.3 Explain why it is important to be helpful and polite			
	1.4 Explain the need for confidentiality and implications of data protection legislation			
	1.5 Provide examples of typical tourist information enquiries			
	1.6 Describe how the main provisions of data protection legislation affect the provision of tourism-related information and advice			
	1.7 Describe how the main provisions of disability discrimination legislation affect the provision of tourism-related information and advice			
	1.8 Describe organisational policies or requirements relating to providing advice and information to customers			
	1.9 Describe any other legal requirements relating to providing advice and information to customers			
	1.10 Explain why it is important to monitor customers' behaviour to identify any dissatisfaction			
	1.11 Explain the consequences of misrepresentation during discussions with customers			
	1.12 Explain why it is important to check that customers are satisfied with the information and advice they have been given			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to identify customers' information and advice needs	2.1	Identify customers' information needs clearly			
		2.2	Confirm any uncertainties about customers' information and advice			
		2.3	Explain to customers where any charges are made for the supply of information			
		2.4	Confirm that customers are willing to pay for chargeable information prior to accessing it			
3	Know how to identify customer information and advice needs	3.1	Describe how customers' tourism-related information and advice needs can be identified			
		3.2	Describe ways of clarifying and confirming customers' needs for information and advice			
		3.3	Explain how to deal with dissatisfied customers			
		3.4	Explain how to balance and acknowledge the needs of customers			
4	Be able to source relevant tourism-related information and advice	4.1	Select suitable and reliable sources that will provide the information required by customers			
		4.2	Access and use a range of tourism-related information sources			
		4.3	Allocate time to balance the needs of the individual, other customers and the organisation when researching information and advice			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Know how to source reliable tourism-related information	5.1	Describe a range of tourism-related information sources			
		5.2	Identify external organisations that may be called upon for additional and specialist tourism-related information			
		5.3	Describe how to access and use a range of tourism-related information sources			
		5.4	Describe how to extract and present information for customers			
		5.5	Give examples of information that is freely available and that which has a charge			
		5.6	Describe how tourism related information is updated and stored by the organisation			
		5.7	Identify any colleagues that have specialist knowledge			
6	Be able to provide relevant tourism-related information and advice to customers	6.1	Provide relevant, complete, accurate and up-to-date information and advice			
		6.2	Confirm customers' understanding of the information and advice given to them			
		6.3	Explain to customers any restrictions attached to products and services described			
		6.4	Offer advice on a range of alternatives when the information that has been provided does not meet the customers' expectations			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
7 Know how to provide tourism-related information and advice to customers	7.1 Describe the main responsibilities for giving information and advice under current network minimum standards			
	7.2 Describe how to use varied vocabulary and expressions to suit the purpose			
	7.3 Describe how to adapt what and how much is said to suit different situations			
	7.4 Describe how to show the customer is being listened to			
	7.5 Describe how to identify customers' intentions			
	7.6 Describe how to move a discussion forward			
	7.7 Give examples of how to adapt language to suit the subject, purpose and the person being spoken to			
	7.8 Explain how to structure what is said to help customers follow a line of thought or number of points clearly			
	7.9 Describe how to use verbal or visual illustrations to help customers understand any points being made			
	7.10 Describe how to confirm the customers' understanding and satisfaction with the information and advice provided			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 13: Complete Foreign Exchange Transactions

Unit reference number:	Y/601/5746
Level:	3
Credit value:	7
Guided learning hours:	53

Unit summary

This unit supports workforce development for those who carry out foreign exchange transactions for customers eg within travel agencies.

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

Evidence requirements

LEARNING OUTCOME	Be able to maintain foreign exchange supplies to meet customer demands
What you must **DO**	The assessor must assess assessment criteria 3.1-3.3 and 3.5-3.7 by directly observing the learner's work. The assessor may assess assessment criterion 3.4 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	   – at least **two** from **foreign exchange**
	      a foreign currencies
	      b foreign currency traveller's cheques
	      c sterling traveller's cheques
	   – at least **two** from **anticipated demand**
	      a immediate use
	      b reserve stock
	      c advance orders
	
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to sell and buy exchange products to and from customers
What you must **DO**	The assessor must assess assessment criteria 6.1-6.8, 6.11 and 6.12 by directly observing the learner's work. The assessor may assess assessment criterion 6.9 and 6.10 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	– **both** from **exchange rate**
	  a **buy**
	  b **sell**
	– at least **two** from **foreign exchange**
	  a **foreign currencies**
	  b **foreign currency traveller's cheques**
	  c **sterling traveller's cheques**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to remit foreign exchange
What you must **DO**	The assessor may assess assessment criteria 8.1-8.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	– at least **two** from **foreign exchange**
	  a **foreign currencies**
	  b **foreign currency traveller's cheques**
	  c **sterling traveller's cheques**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of foreign exchange services	1.1 Explain the importance of following the correct procedures for ordering currency from suppliers			
	1.2 Explain the importance of maintaining accurate records of foreign exchange transactions			
	1.3 Explain the importance of displaying accurate and up-to-date exchange and commission rates			
	1.4 Explain the importance of monitoring competitors and using competitive rates			
	1.5 Explain the significance of the spread between buying and selling rates			
	1.6 Explain the importance of accurately forecasting needs and maintaining stock			
	1.7 Describe reliable sources of accurate currency exchange information			
	1.8 Explain how rates vary according to local conditions			
	1.9 Explain the consequences of maintaining incorrect levels of stock			
	1.10 Explain the importance of storing and despatching foreign exchange securely			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand currency exchange operations	2.1 Describe reliable sources of information on national currencies worldwide			
	2.2 Identify the countries inside the Euro Zone			
	2.3 Identify current currency exchange limits and restrictions			
	2.4 Identify where to find exchange rates and the amount of commission charged			
	2.5 Identify any appropriate alternatives to avoid currency limits and/or restrictions			
	2.6 Explain the purpose and function of money transfer agents and when to use their services			
	2.7 Explain different types of exchange rates and when and how to use them			
	2.8 Describe how to advise customers of suitable foreign exchange transactions for particular destinations			
	2.9 Explain the costs of currency transactions to customers			
	2.10 Explain how and where to access information on exchange rates			
	2.11 Describe how to calculate total transaction charges using exchange rates and commission rates			
	2.12 Identify the currencies of different countries			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to maintain foreign exchange supplies to meet customer demands	3.1	Place orders for foreign exchange supplies to meet anticipated demand			
		3.2	Place foreign exchange orders within agreed organisational limits and procedures			
		3.3	Maintain stocks of foreign currency to meet customers' immediate requirements			
		3.4	Maintain the required stock balance in the till each day			
		3.5	Comply with organisational till audit requirements			
		3.6	Keep currencies safe and secure at all times following organisation security procedures			
		3.7	Ensure currency stock records are accurate and up-to-date			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know how to maintain stocks of foreign exchange supplies	4.1 Describe how seasonal variations affect demand for particular currencies			
	4.2 Identify where to find information on orders			
	4.3 Describe how to calculate anticipated foreign exchange needs			
	4.4 Identify the optimum stock to be held locally to meet anticipated demands			
	4.5 Describe the organisation's policy on stock management, safety and security			
	4.6 Identify the organisation's operating limits on stock holding			
	4.7 Identify who to inform regarding large transactions			
	4.8 Explain the significance of passing on information about large foreign exchange transactions			
	4.9 Describe organisational procedures for remitting and receiving stock			
	4.10 Describe security procedures for handling and storing stock			
	4.11 Describe how to maintain and complete stock and sales records			
	4.12 Describe how to correctly document selling and buying transactions			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Understand the regulations and organisational procedures governing foreign exchange transactions	5.1	Explain current regulations that affect foreign exchange transactions			
		5.2	Explain current regulations affecting foreign exchange services and money laundering			
		5.3	Identify sources that control exchange rates or undertake large transactions			
		5.4	Explain how to maintain currency stock levels and how they are adjusted to meet demands			
		5.5	Identify documentation used to record exchange rate changes			
		5.6	Describe regulations related to checking foreign exchange calculations			
		5.7	Identify the frequency at which foreign and local exchange rates must be monitored			
		5.8	Describe company policy on establishing local exchange rates			
		5.9	Identify where to get authority to offer preferential rates			
		5.10	Describe audit requirements for checking the till			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Be able to sell and buy exchange products to and from customers	6.1	Identify and verify major currencies and refer exchange queries to the appropriate person			
		6.2	Display accurate and up-to-date exchange and commission rate information in the correct format			
		6.3	Explain the advantages and disadvantages of different types of currency and equivalents			
		6.4	Confirm transactions and associated costs with customers			
		6.5	Explain any relevant restrictions associated with foreign exchange products			
		6.6	Advise customers on the most suitable currency transactions to meet their individual needs			
		6.7	Conduct transactions using the correct exchange rates and in compliance with current regulations			
		6.8	Follow procedures to maintain the safety and security of currency, documents, customers and yourself			
		6.9	Identify and deal with suspicious transactions in a tactful way			
		6.10	Resolve any suspicious transactions following legal and organisational procedures			
		6.11	Maintain accurate and up-to-date records of foreign exchange transactions and the till balances at the end of the day			
		6.12	Complete daily balancing of foreign and local currency			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
7 Know how to conduct foreign exchange transactions	7.1 Describe how to process payments for foreign exchange 7.2 Describe ways to maintain the security of cash and equivalents when processing transactions			
8 Be able to remit foreign exchange to suppliers	8.1 Secure all returned currency packages 8.2 Correctly address all currency packages being returned 8.3 Return foreign currency to suppliers using the correct remit rate and within agreed time limits 8.4 Follow the organisation's security procedures when remitting foreign exchange 8.5 Complete despatch documentation accurately 8.6 Maintain currency returns records accurately			
9 Know how to remit foreign currency to suppliers	9.1 Identify where the organisation buys and remits foreign currency and travellers' cheques 9.2 Describe the importance of following correct procedures in remitting currency and processing equivalents to suppliers 9.3 Describe the importance of maintaining accurate records of foreign exchange orders and transactions with suppliers			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 14: Arrange Travel Itineraries

Unit reference number:	J/601/5760
Level:	2
Credit value:	7
Guided learning hours:	57

Unit summary

This unit supports workforce development for those who create travel itineraries for customers.

The unit is designed for use primarily by leisure and business travel agents, by tour operator staff where tailor made travel bookings are made direct and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to identify suitable travel-related components to meet customers' requirements
What you must **DO**	The assessor may assess assessment criteria 2.1-2.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	  − at least **one** from **customer contact**
	    a face-to-face
	    b telephone and electronic (email or chat)
	  − at least **one** from **customers' wants needs and preferences**
	    a timing
	    b travel
	    c accommodation
	    d additional services
	  − at least **two** from **customer information**
	    a customers' contact details
	    b product enquiries
	    c relevant interests
	  − at least **one** from **recorded**
	    a manually
	    b electronically
	  − at least **three** from **components**
	    a travel
	    b transfer
	    c accommodation
	    d from a single supplier
	    e from multiple suppliers
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	**Be able to combine components to create itineraries that meet customers' specific wants, needs and preferences**
What you must **DO**	The assessor may assess assessment criteria 4.1-4.3 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	  − at least **one** from **process and store**
	    a manually
	    b electronically
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the factors involved in creating tailor-made travel itineraries to suit customers requirements	1.1	Explain the key features of a positive relationship with customers and the factors which affect it			
		1.2	Explain why it is necessary to adjust means of communication with customers to match their needs and preferences			
		1.3	Explain how customers' perceived needs may be different from their stated needs			
		1.4	Describe a variety of customers and their real and perceived travel needs			
		1.5	Explain how customers' wants, needs and preferences can influence itinerary choices			
		1.6	Explain organisational requirements for collecting, recording and storing customers' information			
		1.7	Explain organisational procedures for checking availability and price of components			
2	Be able to identify suitable travel-related components to meet customers' requirements	2.1	Establish and maintain customer contact			
		2.2	Establish customers' wants, needs and preferences			
		2.3	Collect and record relevant customer information quickly and accurately, in the required format			
		2.4	Comply with operational, organisational and legal requirements when recording customer information			
		2.5	Research suppliers to identify available components to meet specific customer requirements			
		2.6	Describe to customers the features of suitable components and arrangements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to identify suitable travel-related components to meet customers' requirements	3.1 Describe a variety of means of communicating with customers to establish their needs and wants			
	3.2 Describe current rule and regulations governing the sale of travel-related components			
	3.3 Know how to access a variety of printed and electronic information sources			
	3.4 Demonstrate sufficient knowledge of relevant travel geography to meet customers' needs and inspire confidence			
	3.5 Describe the customer information that needs to be captured and recorded			
	3.6 Describe how to identify suitable suppliers of travel and tourism products to suit different customer needs			
	3.7 Identify sources of expert advice within the organisation			
	3.8 Describe the characteristics of a good travel itinerary			
	3.9 Describe the benefits and limitations of different itinerary formats			
	3.10 Identify suitable suppliers of travel and tourism products to suit different customer needs			
	3.11 Identify travel geography areas that meet customers' needs and inspire confidence			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to combine components to create itineraries that meet customers' specific wants, needs and preferences	4.1 Present suitable itineraries and prices accurately and clearly for customer consideration 4.2 Confirm the price, availability and detail of a suitable itinerary to close the sale 4.3 Process and store customer and itinerary details securely and confidentially according to approved procedures			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 15: Obtain and Analyse Customer Feedback

Unit reference number: D/601/6607

Level: 3

Credit value: 4

Guided learning hours: 35

Unit summary

This unit supports workforce development for those who are in contact with travel and tourism customers.

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

Evidence requirements

LEARNING OUTCOME	Obtain customer feedback efficiently
What you must **DO**	The assessor may assess assessment criteria 2.1-2.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the candidate's work for:
	 − at least **two** from **feedback**
	    a quantitative
	    b qualitative
	 − at least **one** from **collection process**
	    a face-to-face
	    b telephone
	 − at least **one** from **record**
	    a manually
	    b electronically
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Analyse and report on customer feedback data
What you must **DO**	The assessor may assess assessment criteria 3.1-3.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles and uses of customer feedback in travel and tourism	1.1	Explain the principles of customer research including sampling to obtain feedback			
		1.2	Explain the principles that affect the collection and analysis of customer feedback data			
		1.3	Explain how constraints of time, cost and staffing affect the collection and analysis of customer feedback			
2	Be able to obtain customer feedback efficiently	2.1	Obtain customer feedback that is suitable for subsequent analysis			
		2.2	Maintain goodwill with the customer throughout the collection process			
		2.3	Ensure the collection process does not damage the reputation of the company			
		2.4	Record customer feedback accurately			
		2.5	Maintain the confidentiality of customer information and feedback			
		2.6	Store information according to organisational requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to analyse and report on customer feedback data	3.1	Identify customer feedback data suitable for the purpose of the evaluation			
		3.2	Extract and interpret information for analysis accurately			
		3.3	Identify any gaps and deficiencies in the data for analysis and suggest how the gaps can be resolved			
		3.4	Seek further assistance from others to enhance the accuracy of analysis when required			
		3.5	Report the results of analysis to meet evaluation criteria promptly and clearly			
		3.6	Report results of analysis that reflect the synthesis of customer feedback			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know how to obtain and analyse customer feedback	4.1 Identify key data that will meet the needs of evaluation 4.2 Explain methods that can be used to obtain feedback from customers 4.3 Identify suitable opportunities to approach customers for feedback 4.4 Distinguish between the types of questions used to ask customers to obtain effective feedback 4.5 Describe the types of customer feedback that can be obtained 4.6 Review the factors affecting the collection and analysis of customer feedback data 4.7 Analyse the validity of customer feedback in meeting evaluation requirements 4.8 Explain how to plan data collection for the most useful feedback opportunities			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 16: Build and Maintain Relationships with Customers Not Present

Unit reference number:	F/601/6440
Level:	2
Credit value:	6
Guided learning hours:	51

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to establish contact with customers
What you must **DO**	The assessor must assess assessment criteria 2.1-2.7 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **two** from **communication links**
	   a telephone
	   b email
	   c SMS
	   d online chat
	   e paper based
	– at least **one** from **special communication requirements**
	   a customers with hearing difficulties
	   b customers with language difficulties
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to communicate and inform customers effectively
What you must **DO**	The assessor must assess assessment criteria 3.1-3.10 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **two** from **customers requirements**
	  a information
	  b booking
	  c complaint
	– at least **two** from **resources**
	  a communications equipment
	  b information screens
	  c materials
	  d information
	  e time
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to manage difficult and demanding customers
What you must **DO**	The assessor must assess assessment criteria 4.1-4.5 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **two** from **difficult customers**
	  a aggressive
	  b abusive
	  c confused
	  d worried
	  e insistent
	– at least **two** from **effective questioning**
	  a open
	  b closed
	  c probing
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the importance of building and maintaining relationships with customers	1.1	Explain the importance of effective listening			
		1.2	Explain the importance of maintaining continual interaction with customers			
		1.3	Explain the importance of time management			
2	Be able to establish contact with customers	2.1	Ensure the quality of communication links with customers are confirmed			
		2.2	Ensure that the purpose of the contact with customer is acknowledged			
		2.3	Gather, record and assess all relevant customer information			
		2.4	Acknowledge points raised and the responses given by customers			
		2.5	Establish a respectful relationship with customers			
		2.6	Meet the levels of service and quality required by the organisation			
		2.7	Address any special communication requirements of the customers in line with the organisational procedures			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to communicate and inform customers effectively	3.1 Confirm own understanding of customers' requirements 3.2 Interact with customers at a suitable level and pace 3.3 Manage switches between communication links to make the process as seamless as possible for customers 3.4 Keep customers informed of relevant activities being undertaken as the interaction progresses 3.5 Use resources effectively 3.6 Provide information to customers in line with their needs 3.7 Complete verbal conversations within set time frames and in line with the organisational requirements 3.8 Inform customers when a colleague is monitoring a verbal conversation in line with the organisational requirements 3.9 Explain to the customer the reason for transferring an interaction to a colleague giving the name of the person to whom they are being transferred 3.10 Maintain appropriate levels of customer confidentiality throughout the interaction			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to manage difficult and demanding customers	4.1	Put difficult customers at ease as soon as possible			
		4.2	Address customers by name where it is appropriate to do so			
		4.3	Accurately identify the specific needs of customers using effective questioning			
		4.4	Manage the expectations of customers, whilst balancing their requirements with those of the organisation			
		4.5	Resolve the needs of difficult customers using approved organisational procedures			
5	Know how to manage accommodation and transfers	5.1	Describe how to apply effective listening			
		5.2	Identify when to use closed and probing questions suitable for different customers			
		5.3	Identify techniques which demonstrate attentiveness and maintain customers' effective participation during different types of interaction			
		5.4	Describe skills required to use the full range of communication links available and how to implement them effectively			
		5.5	Describe ways to manage time that balance the requirements of the customers with those of the organisation			
		5.6	Describe techniques that maintain control of interactions whilst maintaining a positive relationship with the customer			
		5.7	Describe techniques for maintaining continual interaction with different customers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.8 Describe how to handle verbal conversations with customers with hearing difficulties			
	5.9 Identify the organisation's accepted wording for greeting and communicating with customers			
	5.10 Describe organisational procedures for dealing with difficult customers			
	5.11 Describe organisational products and or services within own areas of responsibility			
	5.12 Outline the organisational procedures and facilities for addressing the needs of customers with special communications requirements			
	5.13 Identify your organisational procedures for informing customers whenever colleagues are monitoring verbal conversation			
	5.14 Describe the different levels of responsibility within the organisation			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 17:   Process Travel Services Bookings

Unit reference number: A/601/6548

Level: 2

Credit value: 5

Guided learning hours: 37

Unit summary

This unit supports workforce development for those who book travel services for customer, eg package holidays, flights, accommodation, and additional services such as parking, transfers, excursions.

The unit is designed for use primarily by leisure and business agents, tour operator staff who handle direct bookings and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	To be able to complete booking administration
What you must **DO**	The assessor must assess assessment criteria 2.1-2.3 by directly observing the learner's work or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	 – at least **four** from **bookings**
	   a **package holidays**
	   b **flights**
	   c **accommodation**
	   d **journey**
	   e **travel**
	   f **coach**
	   g **rail**
	   h **cruise**
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	To be able to process and issue documentation and additional services
What you must **DO**	The assessor <u>must</u> assess assessment criteria 4.1-4.6 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	 – at least **three** from **documentation**
	     a pre-issued
	     b on departure
	     c e-tickets
	     d ticketless
	 – at least **five** from **additional services**
	     a car hire
	     b VIP lounges
	     c car parking
	     d transport to and from departure point
	     e accommodation
	     f insurance
	     g pre-bookable excursions and tickets
	     h tour operators' extras
	     i ski packs
	     j upgrades
	     k other transport
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles to process travel services bookings	1.1 Describe the principles of the licensing and controlling authorities rules			
	1.2 Identify current industry codes of practice and legislation regarding travel ticket-issuing			
	1.3 Explain the importance of accurate and secure record keeping			
	1.4 Explain how legislation affects the way personal information is recorded and stored			
2 Be able to complete booking administration	2.1 Ensure customers' details and booking arrangements are accurate			
	2.2 Use appropriate booking systems correctly, safely and securely			
	2.3 Ensure customers' information is recorded accurately and confidentiality is maintained			
3 Understand the booking administration process	3.1 Describe organisational and suppliers' procedures for completing manual or computer bookings			
	3.2 Describe how to process booking documentation, monitor and log bookings			
	3.3 Explain how to use current travel services booking systems			
	3.4 Identify the types of customer information that must be recorded			
	3.5 Describe the importance of confidentiality			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to process and issue documentation and additional services	4.1 Process documentation promptly after the booking is completed following organisational and suppliers' procedures			
	4.2 Provide customers and suppliers with confirmation of the services booked			
	4.3 Issue correct copies of travel and other documentation to relevant parties within the timescale and according to organisational procedures			
	4.4 Update travel and additional services documentation promptly and accurately where necessary			
	4.5 Deal with any discrepancies promptly			
	4.6 Handle and store booking information and documentation securely following organisational procedures and legal requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know how to process and issue documentation and additional services	5.1 Explain how to process travel documentation 5.2 Identify the types of travel documentation that can be issued and completed 5.3 Describe the booking terms and conditions 5.4 Explain abbreviations and terms used on travel documentation 5.5 Explain the consequences of booking errors and incorrect issue or process of documents 5.6 Describe the importance of accuracy in documentation 5.7 Identify methods of making documents available to customers			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 18: Assist with Travel and Tourism Problems and Emergencies

Unit reference number: K/601/6559

Level: 2

Credit value: 4

Guided learning hours: 32

Unit summary

This unit supports workforce development for those to whom customers turn for help with problems and emergencies.

The unit is designed for use primarily by resort staff, tour operations staff and head office, tour leaders and others who can be expected to be involved in dealing with problems and emergencies. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to assist the resolution of a customer's problem
What you must **DO**	The assessor may assess assessment criteria 2.1-2.8 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	  – at least **two** from **problems**
	
	    a itinerary
	    b accommodation
	    c personal property
	    d documentation
	    e standard of products and services
	    f personal problems
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to assist the local implementation of emergency procedures
What you must **DO**	The assessor may assess assessment criteria 4.1-4.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	− at least **two** from **people**
	
	  a **colleagues**
	  b **customers directly affected by the emergency**
	  c **customers not directly affected by the emergency**
	  d **suppliers**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the importance of assessing problems and emergencies	1.1	Explain why it is important to assess problems before taking action			
		1.2	Identify features of problems that should be assessed			
		1.3	Explain why it is important to assess emergencies before taking action			
		1.4	Identify features of emergencies that should be assessed			
2	Be able to assist the resolution of a customer's problem	2.1	Identify the nature of the customer's problem			
		2.2	Confirm understanding of the problem			
		2.3	Offer accurate information and advice promptly in a way that customers can easily understand			
		2.4	Offer customers a choice of suitable solutions where available			
		2.5	Reach an agreed solution that balances the needs of the customer with those of the organisation			
		2.6	Maintain the goodwill of the customer			
		2.7	Seek appropriate help from the relevant person(s) when necessary			
		2.8	Complete all necessary records clearly and accurately			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know procedures for gathering, recording and reporting information about problems and emergencies	3.1	Outline the information that typically needs to be gathered and recorded about common travel and tourism problems			
		3.2	Explain why prompt help and good communications with customers, colleagues and other affected parties is important			
		3.3	Assess the consequences of failing to pass on information to everyone affected by emergencies			
		3.4	Identify appropriate sources of information for dealing with customer problems			
		3.5	Describe the importance of keeping people affected by emergencies up-to-date and reassured			
		3.6	Describe suitable means of recording and reporting details of problems and emergencies			
		3.7	Describe organisational guidelines and procedures for handling problems and emergencies			
		3.8	Identify the person(s) who should be contacted for help and advice			
		3.9	Describe the circumstances in which other people should be contacted for help and advice			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to assist the local implementation of emergency procedures	4.1	Identify the main details of the emergency			
		4.2	Follow instructions and allocated tasks throughout the situation			
		4.3	Minimise inconvenience to customers and maintain goodwill			
		4.4	Keep all people affected by the emergency up to date as instructed and offer reassurance			
		4.5	Seek additional help from relevant persons when necessary			
		4.6	Maintain an appropriate balance between needs and individuals and needs of the group as a whole.			
5	Understand the actions to take in the event of problems and emergencies	5.1	Describe solutions for common problems and emergencies that maintain customer morale and goodwill			
		5.2	Describe how proposed solutions balance the needs of customers, colleagues and the organisation			
		5.3	Describe the limits of own authority in assisting with problems and emergencies			
		5.4	Describe when and how additional help can be obtained from relevant persons			
		5.5	Describe the value of taking the correct action to maintain good customer relationships			
		5.6	Describe the value, to the organisation, of customer goodwill in problem and emergency situations			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Know how to communicate effectively with customers in problem and emergency situations	6.1	Describe how to adapt what and how much is said to customers in different situations			
		6.2	Describe how to use verbal and visual signals to show that the customer is listening closely and responding appropriately			
		6.3	Describe ways to identify customers' intentions			
		6.4	Describe techniques that can help move a discussion forward			
		6.5	Describe how to adapt language to suit the subject, purpose and person being spoken to			
		6.6	Describe how to structure speech to help customers follow a line of thought or number of points clearly			
		6.7	Describe how to use visual and verbal illustrations to help customers understand points being made			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 19: Collect and Maintain Tourism Information and Data

Unit reference number:	Y/601/6590
Level:	2
Credit value:	3
Guided learning hours:	20

Unit summary

This unit supports workforce development for those who collect and maintain information systems for access by colleagues, eg customer buying trends, resort and hotel information, local events diary.

The unit is designed for use primarily by tour operators and tourist information staff and others who carry out these workplace activities.

The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to collect and evaluate tourism information and data
What you must **DO**	The assessor may assess assessment criteria 2.1-2.4 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must COVER	There must be performance evidence, gathered through observing the learner's work for:
	– at least **two** from **sources**
	a customers
	b suppliers
	c colleagues
	d directories
	e websites
	f newspapers and magazines
	– at least **two** from **methods**
	a issuing questionnaires
	b manual counting
	c electronic counting
	d electronic inputting and recording
	e speaking to customers by telephone
	f speaking to customers face to face
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
LEARNING OUTCOME	**Be able to maintain tourism information systems and data**
What you must **DO**	The assessor may assess assessment criteria 4.1-4.7 through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **one** from **information systems**
	a for business performance data and information
	b for tourist information
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of maintaining tourism information and data	1.1	Explain why tourism information and data is needed and how it is used by organisations			
		1.2	Describe the consequences of using out-of-date information and data			
		1.3	Explain the need for confidentiality and the implications of data protection legislation in collecting tourism data			
		1.4	Identify sources of reliable tourism information and data			
		1.5	Identify suitable opportunities, methods and sources for collecting relevant information and data			
		1.6	Describe own responsibilities for collecting and storing tourism data			
2	Be able to collect and evaluate tourism information and data	2.1	Collect data and information at times and frequencies to meet research objectives			
		2.2	Use a range of reliable sources and methods to collect tourism information and data to meet organisational needs			
		2.3	Ensure that all information and data collected is accurate and up-to-date			
		2.4	Record and present information in required formats			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Understand how to research and collect tourism-related data and information	3.1 Compare advantages and disadvantages of a range of data collection methods 3.2 Describe organisational requirements and procedures for: – recording data and information – grouping data and information into different categories – cross-referencing data and information – disposing of out-of-date information – locating tourist information within the organisation – the timing and frequency of updates 3.3 Describe how to gather information from telephone calls and face-to-face conversations 3.4 Describe how to use varied vocabulary and expressions to suit the subject, purpose and customer 3.5 Describe how to adapt what and how much to say to suit different situations 3.6 Describe how to show active listening and respond appropriately 3.7 Describe how to identify customers' intentions 3.8 Describe how to move a discussion forward 3.9 Describe how to structure what to say to help customers follow a line of thought or number of points clearly			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	3.10	Describe how to use verbal or visual illustrations to help customers understand any points you are making			
	3.11	Describe how to use electronic inputting and recording systems			
	3.12	Identify who to refer data and information handling problems to			
4 Be able to maintain tourism information systems and data	4.1	Use systems to safely and securely handle data and information			
	4.2	Select a suitable location for storage of collected data			
	4.3	Store data and information under relevant topic headings			
	4.4	Make accurate and prompt updates to information systems			
	4.5	Ensure that entries into the information system(s) are cross-referenced, accurate, up-to-date and easy to access			
	4.6	Remove out-of-date data and information from information systems promptly			
	4.7	Dispose of out of date, damaged or unwanted information items following the organisation's waste disposal procedures			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know how to maintain tourism information and data	5.1 Describe how information and data is stored in paper-based and/or electronic systems			
	5.2 Describe how filing and cross referencing systems enable users to access information and data			
	5.3 Describe systems for the removal of out-of-date, damaged and unwanted data from storage systems			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 20: Assist with Transfers

Unit reference number:	Y/601/6556
Level:	2
Credit value:	4
Guided learning hours:	29

Unit summary

This unit supports workforce development for those who assist with transfers for visitors eg between transport hubs, between airports and accommodation.

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

Evidence requirements

LEARNING OUTCOME	Be able to welcome and assist customers on arrival
What you must **DO**	The assessor must assess assessment criteria 2.1-2.6 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	– at least **three** from **arriving customers**
	
	  a **anxious**
	  b **aggressive**
	  c **demanding**
	  d **disruptive**
	  e **harassed**
	  f **with special needs**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to escort and brief customers during transfers
What you must **DO**	The assessor must assess assessment criteria 3.1-3.6, 3.8 and 3.9 by directly observing the learner's work. The assessor may assess assessment criterion 3.7 through questioning or witness testimony.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	   – **all** from **essential/critical information**
	     a **health and safety**
	     b **accommodation**
	     c **arrival point facilities**
	     d **journey times**
	     e **local times and temperatures**
	     f **location**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to assist customers at the departure point
What you must **DO**	The assessor must assess assessment criteria 4.1-4.4 by directly observing the learner's work.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Understand the principles that affect transfers	1.1	Explain the importance of creating a positive impression for your customers			
	1.2	Describe the effect travelling can have on a customer's ability to pay attention and the implications of this when giving instructions and information			
	1.3	Explain the importance of checking off customers on arrival as quickly as possible			
	1.4	Explain how and why commentaries need to be adapted for the time of day, length of journey and time until there is an opportunity to give more in-depth information			
	1.5	Explain the importance of ensuring your customers are settled before leaving them			
	1.6	Explain the importance of leaving transport clean and tidy after use			
	1.7	Explain the significance of the farewell process in creating a lasting positive impression of you and your organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to welcome and assist customers on arrival	2.1	Greet arriving customers in a friendly, approachable and polite manner			
		2.2	Balance customers' individual needs and the needs of the group			
		2.3	Meet customers needs in line with organisational procedures			
		2.4	Check customers off promptly and direct them to their onward transport clearly			
		2.5	Enhance customer safety by giving warnings of any hazards en route to onward transport and destinations			
		2.6	Promptly assist and reassure any customers who have baggage problems			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to escort and brief customers during transfers	3.1	Check customers off promptly prior to transport departure			
		3.2	Locate any missing passengers promptly and reassure the rest of the group			
		3.3	Give all essential safety and comfort information to customers prior to departure			
		3.4	Give essential information or commentary to help customer familiarisation with surroundings prior to arrival at accommodation and/or departure point			
		3.5	Announce arrival at accommodation or transport link clearly and in good time			
		3.6	Ensure that customers leave the transfer vehicle at the correct place with all luggage and possessions			
		3.7	Ensure that any lost property is promptly returned to customers following the organisation's procedures			
		3.8	Complete any records clearly and accurately			
		3.9	Forward completed customer records to the relevant person(s)			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to assist customers at the departure point	4.1	Give customers accurate departure point information and advice			
		4.2	Ensure that customers are in the correct check-in queue for their journey			
		4.3	Ensure that customers have the correct documentation to hand prior to arriving at the check in desk			
		4.4	Resolve any check-in problems and requests promptly and in a way that balances the needs of the customer and the organisation			
5	Know how to assist customers during transfers	5.1	Describe organisational requirements and procedures for conducting transfers and completing records			
		5.2	Describe how to respond to and handle different types of customers			
		5.3	Describe how to direct and control customers in ways that maintain their goodwill			
		5.4	Describe where and how to clearly and recognisably position self to customers			
		5.5	Identify the critical information needed to pass on to customers for the transfers that are being conducting			
		5.6	Describe how and where to confirm arrival and departure times			
		5.7	Describe how and where to find check-in information			
		5.8	Describe how to access up to date transfer lists and explain the importance of possessing these			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.9 Describe the internal and external layout of and facilities available at the arrival/departure point(s)			
	5.10 Identify safe passenger walking routes to and from transport parking areas			
	5.11 Describe the route(s) to the accommodation and airports			
	5.12 Identify accommodation names and locate dropping off points			
	5.13 Explain the importance of ensuring the customers are on the right vehicle			
	5.14 Describe how to use a microphone			
	5.15 Explain the importance of giving customers vehicle safety and comfort information immediately prior to departure			
	5.16 Identify any current health and safety hazards and risks in the immediate area that are likely to affect customers			
	5.17 Describe arrival/departure points' procedures and requirements for reporting and following up baggage-related problems			
	5.18 Describe organisational arrangements for dealing with lost property			
	5.19 Identify travel document requirements and describe how to check that customers have the correct documents to hand			
	5.20 Describe commonly occurring checking-in problems and how to resolve them			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 21: Sell Tourism-Related Products and Services

Unit reference number:	F/601/6566
Level:	2
Credit value:	5
Guided learning hours:	31

Unit summary

This unit supports workforce development for those who sell tourism products and services for visitors, eg at Tourist Information Centres, souvenir shops, visitor attractions, etc.

The unit is designed for use primarily by visitor services retail staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	**Be able to identify and meet customers' requirements**
What you must **DO**	The assessor must assess assessment criteria 2.1-2.6 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **three** from **products**
	a literature
	b souvenirs
	c tickets
	d maps
	– **all** from **services**
	a visitor information
	b advice
	c directions
	– **one** from **suitable action**
	a ask a colleague for assistance
	b refer customers to a suitable colleague
	c apologise for the inability to progress things further
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
LEARNING OUTCOME	**Be able to promote benefits and features of tourism products and services**
What you must **DO**	The assessor must assess assessment criteria 4.1-4.4 by directly observing the learner's work.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the process of selling products and services	1.1 Describe different customer types and their needs			
	1.2 Describe how to use selling techniques to make sales			
	1.3 Explain the importance of recording, processing and storing customer information to meet the organisation's and legal requirements			
	1.4 Describe the main requirements of legislation which applies to selling to customers			
	1.5 Explain the importance of following organisational policies and procedures			
	1.6 Explain why it is important to ensure that information provided to customers is accurate and up to date			
	1.7 Explain the consequences of misrepresentation during discussions with customers			
	1.8 Describe responsibilities for giving information and advice under the organisation's minimum operating standards			
	1.9 Describe suitable action to take where customers' queries cannot be answered			
	1.10 Explain why follow-up with customers must comply with organisational and legal requirements			
	1.11 Describe the organisation's requirements and any legal requirements for advising customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to identify and meet customers' requirements	2.1	Identify tourism products and services that best match the customers' needs			
		2.2	Offer tourism products and services that best match the customers' needs			
		2.3	Identify opportunities to sell extra tourism products and services to customers			
		2.4	Offer suitable extra tourism products and services to customers			
		2.5	Offer relevant alternatives to customers' requests			
		2.6	Take suitable action when customers' needs can not be answered			
3	Know how to identify and meet customers' requirements	3.1	Describe suitable means of establishing customers' needs			
		3.2	Explain how suitable tourism products and services can be identified and offered to customers			
4	Be able to promote benefits and features of tourism products and services	4.1	Promote products and service benefits clearly, accurately and in a way which generates further interest from the customer			
		4.2	Give customers opportunities to fully discuss and explore features and benefits of products and services			
		4.3	Describe to the customer any terms, conditions and legal requirements relating to the sale			
		4.4	Explain to customers, how the product(s) meet their needs			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Know how to promote tourism-related products to customers	5.1	Describe how to access and use current and reliable information sources relating to products and services			
		5.2	Describe how to use selling techniques to make sales			
		5.3	Explain why it is important to ensure that information provided to customers is accurate and up-to-date			
6	Know tourism-related products and services	6.1	Describe the structure of the local tourism industry			
		6.2	Describe the names and location of key geographical features in the local region and country including: – the most visited places – major tourist attractions – special events			
		6.3	Describe the types of transport and tickets available in the local area			
		6.4	Describe the differences between official gradings and categorisations for accommodation			
		6.5	Describe the different types of accommodation			
		6.6	Compare the different methods of booking and paying for accommodation			
		6.7	Describe the main service providers and their products			
		6.8	Describe commissions and booking fees including what they are, when they need to be applied and how to calculate them			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	6.9 Identify the main industry trade associations, their main purposes and the benefits to customers			
	6.10 Describe how to read and interpret maps to identify:			
	– major seaports			
	– tourist destinations			
	– capital cities			
	– major cities			
	– any island groups of the country			
	6.11 Describe how and when to use the phonetic alphabet			
	6.12 Describe how to use and interpret brochures and timetables to provide information and costings			
	6.13 Explain how to identify and interpret booking conditions and specific restrictions relating to the products and services offered by the organisation			
	6.14 Describe any insurance attached to products and services sold			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
7 Be able to close the sale	7.1 Seek the customers' intention to buy at a suitable time in the discussion			
	7.2 Positively reassure customers following their buying choice			
	7.3 Sell extra tourism products and services effectively			
	7.4 Provide customers with the total cost of all products and services			
	7.5 Give the customer clear and accurate confirmation and reassurance, at the close of the sale			
	7.6 Complete the sale to meet the organisation's procedures and legal requirements			
8 Know how to close the sale	8.1 Describe how customers intention to buy can be identified			
	8.2 Explain how the sale can be closed			
	8.3 Identify additional tourism products and services that can be built onto initial sales			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 22: Resolve Customer Service Problems

Unit reference number:	M/601/1511
Level:	2
Credit value:	6
Guided learning hours:	40

Unit summary

This unit is about what to do when it is difficult to meet customer expectations. Even if the service the learner gives is excellent, some customers experience problems. Part of the learner's job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because the customer's expectations involve more than the learner can offer or because service procedures have not been followed. Some problems are reported by customers and sometimes the learner will spot the problem first and resolve it before their customer has even noticed. As soon as the learner is aware of a problem, they need to consider the options and then choose a way to put it right. This unit is particularly important in customer service because many customers judge how good the customer service of the organisation is by the way problems are handled.

Assessment requirements

The assessment and quality assurance requirement for this unit provides evidence towards A and V units.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Spot customer service problems	1.1 Listen carefully to customers about any problem they have raised			
	1.2 Ask customers about the problem to check their understanding			
	1.3 Recognise repeated problems and alert the appropriate authority			
	1.4 Share customer feedback with others to identify potential problems before they happen			
	1.5 Identify problems with systems and procedures before they begin to affect customers			
2 Pick the best solution to resolve customer service problems	2.1 Identify the options for resolving a customer service problem			
	2.2 Work with others to identify and confirm the options to resolve a customer service problem			
	2.3 Work out the advantages and disadvantages of each option for their customer and the organisation			
	2.4 Pick the best option for their customer and the organisation			
	2.5 Identify for their customer other ways that problems may be resolved if they are unable to help			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Take action to resolve customer service problems	3.1	Discuss and agree the options for solving the problem with their customer			
		3.2	Take action to implement the option agreed with their customer			
		3.3	Work with others and their customer to make sure that any promises related to solving the problem are kept			
		3.4	Keep their customer fully informed about what is happening to resolve the problem			
		3.5	Check with their customer to make sure the problem has been resolved to the customer's satisfaction			
		3.6	Give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction			
4	Know how to resolve customer service problems	4.1	Describe organisational procedures and systems for dealing with customer service problems			
		4.2	Explain how to defuse potentially stressful situations			
		4.3	Describe how to negotiate			
		4.4	Identify the limitations of what they can offer their customer			
		4.5	Describe types of action that may make a customer problem worse and should be avoided			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 23:   Plan and Conduct Welcoming Events

Unit reference number: D/601/5778

Level: 2

Credit value: 5

Guided learning hours: 34

Unit summary

This unit supports workforce development for those who plan and conduct welcoming events for visitors to resorts. The unit is designed for use primarily by tour operations field staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to plan welcoming events
What you must **DO**	The assessor may assess assessment criteria 2.1-2.9 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	 – at least **one** from **objectives**
	     a **attendance numbers**
	     b **level of take up of products and services**
	     c **perceived level of customer satisfaction with the event and information supplied**
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to conduct welcoming events
What you must **DO**	The assessor must assess assessment criteria 4.1-4.18 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	   – at least **one** from **documentation**
	
	      a booking forms
	      b attendance lists
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles and purposes of welcoming events	1.1 Explain the importance of repeat business and the contribution of welcoming events in supporting business			
	1.2 Explain why it is important to show an interest in customers and use personal knowledge, colleagues' experience and team work to display a professional attitude and create a positive impression			
	1.3 Explain the importance of establishing good working relationships with local supplier contacts			
	1.4 Explain how commissions payable on excursion and entertainment sales contribute as a main tour operator income stream			
	1.5 Explain the importance of making an evaluation of your own performance and using this to inform changes to future events			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to plan welcoming events	2.1	Identify accessible venues which meet customers' expectations			
		2.2	Book accessible venues which meet customers' expectations using approved procedures			
		2.3	Rectify any health and safety hazards and unacceptable risks prior to the event			
		2.4	Identify aims, objectives and any relevant targets for welcoming events			
		2.5	Plan the event to suit the intended audience			
		2.6	Make sufficient and relevant information materials available for the planned event			
		2.7	Ensure that publicity for the event attracts the potential audience and meets the organisation's requirements			
		2.8	Agree the layout and set up of the venue			
		2.9	Arrange necessary equipment in good time for the event			
3	Know how to plan welcoming events	3.1	Explain organisational policies and procedures relating to the conduct of welcoming events and the sale of additional products and services			
		3.2	Explain the importance of following organisational policies and procedures			
		3.3	Describe where to access information on local venues suitable for welcoming events			
		3.4	Identify criteria to be used for assessing the suitability of venues, including health and safety aspects			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.5 Explain how to tailor the content of presentations to meet the likely interests and requirements of audiences			
	3.6 Describe how to compile and structure welcoming event presentations in order to make them lively, informative and entertaining			
	3.7 Describe ways to publicise an event in order to gain maximum impact and response			
	3.8 Identify suitable layouts and set up arrangements for welcoming events			
	3.9 Describe where to access information and materials on local places of interest, entertainment, facilities, cultural aspects and local environmental issues and guidelines			
	3.10 Identify minimum stock levels for customer information materials			
	– Describe how to use and interpret brochures and timetables to provide information			
	3.12 Explain the consequences of misrepresentation (eg in the context of local information amendments and/or updates) during presentations and discussions with customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to conduct welcoming events	4.1	Ensure that the layout and set up of the venue is as requested			
		4.2	Ensure that equipment is in working order prior to the arrival of customers			
		4.3	Acknowledge customers in a polite and friendly way on arrival			
		4.4	Ensure that customers are comfortably seated and have a clear view			
		4.5	Ensure that all necessary information materials are available prior to the start of the presentation			
		4.6	Make any late comers welcome and comfortable with minimum disruption to the meeting			
		4.7	Present well structured and sequenced information using language and style suited to the customers			
		4.8	Ensure customers are aware of where and how to access information updates throughout their stay			
		4.9	Ensure customers are aware of any relevant environmental information and instructions			
		4.10	Take opportunities for promotion/sales of other products and services when appropriate and where required			
		4.11	Address customers' questions promptly and clearly during the event whilst taking into account the information needs of others			
		4.12	Create opportunities for customers with personal queries to speak in confidence at the end of the event			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.13 Create opportunities for customers with further information needs to ask questions after the close of the event			
	4.14 Close the event following organisational procedures			
	4.15 Retain any necessary documentation for processing			
	4.16 Leave the venue clean and tidy after the last customer has left			
	4.17 Follow up known non-attendees, ensuring they have all necessary information and are offered additional products and services that match their interests			
	4.18 Evaluate the success of the event against agreed objectives and recommend adjustments for future events			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know how to conduct welcoming events	5.1 Describe how to check visual aid equipment is functioning			
	5.2 Describe how to meet and greet customers			
	5.3 Explain how to give a verbal presentations using techniques to engage the audience			
	5.4 Describe how to promote the booking of excursion and entertainment offers in ways that maximise uptake			
	5.5 Describe how to handle questions from the audience and when and to whom to redirect any queries			
	5.6 Explain the importance of keeping customers informed throughout their stay and methods for this			
	5.7 Describe the obligations for advising customers of booking conditions and any insurance requirements			
	5.8 Identify the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Know the available resources in the surrounding area	6.1 Explain how to read and interpret maps to identify major seaports, tourist destinations, capital cities, major cities and any island groups applicable to your local region			
	6.2 Identify the names and location of key geographical features in the local region			
	6.3 Identify the location of the most visited destinations in the local region			
	6.4 Describe places of interest, entertainment and eating facilities available in the local area and their suitability for different customer needs			
	6.5 Identify the location of major tourist attractions and special events in your local region			
	6.6 Describe the types of transport available for rent in the area			
	6.7 Describe car rental basic terms and abbreviations			
	6.8 Compare the types of transport and tickets available in your local area			
	6.9 Identify cultural and environmental issues and instructions applicable to the local area			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 24:   Lead People on a Guided Tour

Unit reference number: F/601/5949

Level: 2

Credit value: 5

Guided learning hours: 40

Unit summary

This unit supports workforce development for those who lead tours.

The unit is designed for use primarily by those who lead tours for visitors, eg local heritage sites, industrial sites, walking tours, bus tours and supports workforce development for those who carry out such activities.

Evidence requirements

LEARNING OUTCOME	Be able to ensure the health and safety of the group
What you must **DO**	The assessor must assess assessment criteria 2.1-2.3, 2.5 and 2.6 by directly observing the learner's work. The assessor may assess assessment criterion 2.4 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	     − at least **three** from **advice and guidance**
	       a **emergency procedures**
	       b **safety hazards and potential risks en route**
	       c **personal safety**
	       d **security of personal belongings**
	       e **clothing and footwear**
	
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to lead the tour
What you must **DO**	The assessor must assess assessment criteria 3.1-3.4 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	 – at least **five** from **customers**
	    a **users of home language**
	    b **users of foreign language**
	    c **individuals**
	    d **groups**
	    e **subject specialist**
	    f **general**
	    g **one age group**
	    h **mixed age group**
	    i **through interpreter**
	    j **direct with customers**
	 – at least **two** from **variations**
	    a **before the tour**
	    b **during the tour**
	    c **in response to reasonable customer request**
	    d **in response to hazard**
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of leading people on guided tours	1.1 Explain the importance of maintaining good customer relations and goodwill			
	1.2 Explain the importance of giving accurate information on route and timings before, during and at the conclusion of the tour			
	1.3 Explain why it is important to brief customers fully on safety, welfare, local customs, environmental, religious and regulatory requirements			
	1.4 Explain the importance of good time management when leading groups			
2 Be able to ensure the health and safety of the group	2.1 Correctly identify and record variations from existing assessments of hazard and risk			
	2.2 Maintain customers' health, safety and security			
	2.3 Ensure that tour clients are aware of, and alert to, hazards and potential risks			
	2.4 Recognise customers' needs for physical assistance and for clarification of information and promptly act on these in suitable ways			
	2.5 Confirm customers' understanding of advice and guidance given providing further clarification as necessary			
	2.6 Ensure that all necessary emergency preparations are in place prior to the start of the tour			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to lead the tour	3.1	Ensure that customers have an accurate and clear awareness of the intended route and timings, prior to starting the tour			
		3.2	Follow the planned itinerary of the tour unless circumstances require variations			
		3.3	Make variations to tour itineraries in response to local conditions and the needs of groups			
		3.4	Inform the relevant person(s) of any factors likely to affect future tours			
4	Be able to maintain group cohesion	4.1	Ensure that the group keeps together throughout the tour			
		4.2	Obtain the attention of the whole group quickly when needed			
		4.3	Balance the needs of individuals with the needs of the whole group whenever possible			
		4.4	Ensure that the group complies with local environmental, social and cultural expectations			
		4.5	Deal with any disruptive individuals promptly, firmly and tactfully in suitable ways to minimise disruption			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know how to lead people on a guided tour	5.1 Identify factors affecting group behaviour			
	5.2 Describe the likely causes and consequences of disruptions to the group and others			
	5.3 Describe the likely consequences of both applying and not applying a range of common control procedures with disruptive customers			
	5.4 Summarise the relevant parts of current health and safety legislation			
	5.5 Summarise the relevant parts of current legislation			
	5.6 Describe how to compare the tour risk assessment against current conditions on the tour and customer group			
	5.7 Describe how to assess risks and its importance on an ongoing basis throughout the tour			
	5.8 Explain how age, customer mix and the size of group can affect the conduct of the tour			
	5.9 Describe how to use and apply group management techniques, including those for handling disruptive customers			
	5.10 Describe the health and safety advice and guidance relevant to the tour			
	5.11 Describe the health and safety procedures applicable to the tour venue			
	5.12 Outline the courses of action to take in the event of problems and emergencies and the local facilities available to deal with them and how to access them			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.13 Describe the tour route, sequence and timings and how these may be adapted to suit customers' needs and local conditions			
	5.14 Identify local environmental, social and cultural expectations relevant to the conduct of your tour			
	5.15 Outline onward information for customers relevant to your tour			
	5.16 Outline organisational procedures and requirements for the conduct of the tour, including how and when to make tour reports			
	5.17 Describe organisational and any supplier procedures for dealing with disruptions			
	5.18 Identify the limits of your authority for dealing with problems and emergencies			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 25: Prepare and Maintain Holiday Accommodation

Unit reference number: H/601/5782

Level: 2

Credit value: 4

Guided learning hours: 30

Unit summary

This unit supports workforce development for those who check and prepare accommodation for visitors, eg tents, caravans, chalets.

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

Evidence requirements

LEARNING OUTCOME	**Be able to prepare holiday accommodation**
What you must **DO**	The assessor must assess assessment criteria 2.1-2.11 by directly observing the learner's work. The assessor may assess assessment criterion 2.12 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	 – **both** from **waste**
	    a **left by previous occupants**
	    b **created by the cleaning process**
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	**Be able to maintain accommodation and equipment to specification**
What you must **DO**	The assessor must assess assessment criteria 3.3-3.5 by directly observing the learner's work. The assessor may assess assessment criteria 3.1 and 3.2 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of preparing and maintaining holiday accommodation	1.1	Explain the importance of cleaning and preparation in creating a good first impression of the company			
		1.2	Explain the importance of ensuring accommodation is ready in time for customers			
		1.3	Explain why it is important to carry out safety checks on cleaning equipment you are required to use			
		1.4	Explain why it is important to protect yourself during cleaning and maintenance activities			
		1.5	Explain why it is important to comply with waste disposal requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to prepare holiday accommodation	2.1 Use all necessary personal protective equipment (PPE) correctly			
	2.2 Gather all necessary equipment and materials together, prior to starting work			
	2.3 Use and operate all equipment safely, following manufacturer's instructions			
	2.4 Use cleaning agents and materials that are suited to the task and use according to manufacturer's instructions and organisational guidelines			
	2.5 Demonstrate the sequence of cleaning activities to minimise the risk of spreading infection			
	2.6 Check that all surfaces are clean, dry and smear-free			
	2.7 Check that all furniture and equipment allocated to the accommodation is clean and laid out according to the organisation's presentation requirements			
	2.8 Dispose of waste safely, to any applicable environmental standards and to meet local requirements			
	2.9 Check that all inventory items are in place and fit for purpose			
	2.10 Ensure that accommodation is prepared and available by the time required			
	2.11 Maintain any accommodation records promptly, clearly and accurately			
	2.12 Forward any necessary accommodation records promptly to the correct person			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to maintain accommodation and equipment to specification	3.1	Replace any damaged, faulty or missing items promptly and report according to requirements			
		3.2	Test all equipment safely prior to use and following the organisation's procedures			
		3.3	Report any problems with equipment and accommodation that you cannot immediately resolve to the relevant person(s) promptly			
		3.4	Report low stock of equipment and/or consumable items to the relevant person(s) promptly			
		3.5	Keep the area immediately around the accommodation clean, tidy and free of litter			
4	Know how to prepare and maintain holiday accommodation	4.1	Describe how to avoid the risk of spreading infection when cleaning			
		4.2	Explain how the type of surface and soiling can affect the choice of cleaning agent and equipment			
		4.3	Identify the types of personal protective equipment (PPE) that should be worn when undertaking the cleaning and maintenance activities			
		4.4	Identify the types of equipment and materials needed to prepare the accommodation Summarise the manufacturer's instructions for the equipment, materials and cleaning agents Identify and outline any local regulations that affect accommodation preparation and maintenance activities			
		4.5	Identify the required stock levels for equipment and supplied consumable items			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date

	4.6 Describe organisational procedures for
	    – the preparation of holiday accommodation
	    – general basic internal and external maintenance
	    – equipment testing
	    – reporting problems and the relevant person to contact
	    – recording preparation and maintenance
	    – reporting stock shortages
	
	4.7 Locate the inventory for the accommodation
	
	4.8 Summarise the specifications for the standard of finish required, layout and presentation of furniture and equipment
	
	4.9 Identify allocated time scales for the preparation of holiday accommodation			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 26: Present a Commentary for a Guided Tour

Unit reference number:	A/601/6470
Level:	2
Credit value:	4
Guided learning hours:	28

Unit summary

This unit supports workforce development for those who present scripted commentaries on guided tours for visitors, eg local orientation tours, bus tours.

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

Evidence requirements

LEARNING OUTCOME	**Be able to present a commentary to customers on a guided tour**
What you must **DO**	The assessor must assess assessment criteria 2.1-2.6 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	   – **both** from **presentation aids**
	   a **microphone**
	   b **raised voice**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	**Be able to evaluate, update and improve presentation to customers on a guided tour**
What you must **DO**	The assessor may assess assessment criteria 4.1-4.4 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of presenting commentaries for guided tours	1.1 Explain why sensitivity is important and rapport needs to be created with customers			
	1.2 Describe the characteristics and needs of different types of client groups in relation to a presentation			
	1.3 Explain the need to react appropriately to current events, people and situations			
	1.4 Explain the importance of encouraging and dealing with questions from the group			
	1.5 Explain the consequences of providing inadequate and inaccurate information			
	1.6 Explain the importance of repeating questions for the whole group			
	1.7 Explain the importance of personal appearance when presenting tour commentaries			
	1.8 Describe why, when and how presentation equipment is used			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to present a commentary to customers on a guided tour	2.1	Present accurate information in commentaries			
		2.2	Deliver commentaries within the time allowed			
		2.3	Use presentation aids suitable for the immediate environment effectively and safely			
		2.4	Maintain the interest of tour groups to enhance their enjoyment			
		2.5	Encourage customers to ask questions, make comments and seek clarification at identified and suitable points			
		2.6	Provide clear and accurate summaries and additional information when requested			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to present a commentary on a guided tour	3.1	Describe the content of a fixed route commentary			
		3.2	Describe how to determine success factors relevant to specific commentaries			
		3.3	Identify organisational requirements that affect the way commentaries are presented to customers			
		3.4	Describe any specific additional information that is likely to be requested by customers for the tour and commentary being delivered			
		3.5	Describe where to access relevant information to update commentary			
		3.6	Explain how to find out about tour groups			
		3.7	Explain techniques for gaining and retaining the attention of tour groups			
		3.8	Explain why group and self-positioning is important			
		3.9	Identify suitable presentation aids			
		3.10	Describe how to use tone, manner, pace, style and variety in commentaries			
		3.11	Illustrate how to use the voice to achieve clarity, audibility and a variety of pitch and tone in a commentary			
		3.12	Describe how to use non-verbal communication skills to maintain interest and emphasis the importance of specific subject matter			
		3.13	Describe how to handle and use feedback			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to evaluate, update and improve presentation to customers on a guided tour	4.1	Identify relevant success indicators for commentaries and presentation			
		4.2	Apply suitable methods to collect and record feedback from customers on the commentary			
		4.3	Pass on any feedback that is relevant to other people promptly			
		4.4	Make changes to improve commentary presentations as a result of feedback and self-assessment			
5	Know how to evaluate, update and improve presentation to customers on a guided tour	5.1	Explain why self-evaluation is important in presenting commentaries			
		5.2	Describe methods of collecting and prioritising relevant feedback			
		5.3	Describe the procedure for forwarding feedback to others			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 27: Organise Your Work and Personal Development

Unit reference number: A/601/6601

Level: 3

Credit value: 4

Guided learning hours: 28

Unit summary

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

The unit is designed for any staff who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to organise own workload
What you must **DO**	The assessor may assess assessment criteria 2.1-2.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	  – **all** from **work objectives**
	    a quantity of work
	    b type of work
	    c quality of work
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to develop own personal performance
What you must **DO**	The assessor may assess assessment criteria 3.1-3.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1　Understand the principles of organising work and personal development	1.1　Explain the importance of continuously developing own skills and knowledge for self and the organisation			
	1.2　Explain the importance of time management			
	1.3　Explain the importance of planning and organising own work for self and for the organisation			
	1.4　Explain the importance of having clear, realistic work objectives			
	1.5　Describe how to clarify own objectives			
	1.6　Explain the importance of planning for things that may go wrong			
	1.7　Explain the importance of reviewing own work on a regular basis and adjusting own plans			
	1.8　Explain the importance of updating own personal development plan on a regular basis and of involving other people in the process			
	1.9　Explain the importance of practising new areas of skill and knowledge			
	1.10　Describe how to find opportunities to practise new areas of skills and knowledge			
	1.11　Explain the importance of prompt decision making to self and the organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to organise own workload	2.1	Meet work objectives by: – making the best use of time and resources – prioritising and planning activities			
		2.2	Agree planned work objectives with manager			
		2.3	Work to ensure unhelpful interruptions and diversions are kept to a minimum			
		2.4	Follow development plans as closely as possible			
		2.5	Ensure that work is completed satisfactorily			
		2.6	Achieve work objectives within the agreed deadlines			
3	Be able to develop own personal performance	3.1	Identify own personal career aspirations and the skills/knowledge needed to achieve them			
		3.2	Assess own development needs against personal and the organisation's objectives at regular intervals			
		3.3	Produce and agree suitable development plans with the relevant person where support from others is needed			
		3.4	Recognise and take available opportunities to develop own skills and knowledge to meet known and anticipated work needs			
		3.5	Seek and use feedback from others to help enhance own performance at work			
		3.6	Review and update development plans at regular intervals			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Know how to organise own work and personal development	4.1	Compare different ways to develop self			
		4.2	Describe how to set objectives which are specific, measurable and achievable			
		4.3	Explain how to estimate the amount of time required to carry out planned activities			
		4.4	Explain how to measure own work progress			
		4.5	Describe how to plan and organise own work to meet work objectives, making best use of time and resources available			
		4.6	Describe how to identify and minimise unhelpful interruptions to planned work			
		4.7	Explain how to assess own current level of competence			
		4.8	Describe how to plan and carry out self-reviews			
		4.9	Describe how to encourage and receive feedback from colleagues and manager			
		4.10	Explain how to make constructive use of such feedback			
		4.11	Explain how to develop and manage a personal development plan			
		4.12	Outline current and foreseeable travel and/or tourism industry changes			
		4.13	Describe how travel and/or tourism industry changes may affect the skills and knowledge needed to remain employable			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 28: Sell Travel-Related Products and Services

Unit reference number: H/601/5149

Level: 3

Credit value: 12

Guided learning hours: 89

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to identify customers' travel needs
What you must **DO**	The assessor must assess assessment criteria 2.1-2.5 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	 – at least **three** from **travel products and services**
	   a package holidays
	   b flights
	   c accommodation
	   d ferry travel
	   e coach
	   f rail
	   g cruises
	 – at least **two** from **additional requirements**
	   a dietary
	   b health
	   c mobility
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to promote the features and benefits of travel products and services
What you must **DO**	The assessor must assess assessment criteria 3.1-3.5 and 3.7 by directly observing the learner's work. The assessor may assess assessment criterion 3.6 through questioning or witness testimony.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **three** from **travel products and services**
	  a package holidays
	  b flights
	  c accommodation
	  d ferry travel
	  e coach
	  f rail
	  g cruises
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to close the sale
What you must **DO**	The assessor must assess assessment criteria 4.1-4.3, 4.5 and 4.6 by directly observing the learner's work. The assessor may assess assessment criterion 4.4 through questioning or witness testimony.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **three** from **extra travel products and services**
	  a car hire
	  b VIP lounges
	  c car parking
	  d transport to and from departure point
	  e accommodation
	  f pre-bookable excursions and tickets
	  g tour operators' extras
	  h ski packs
	  i upgrades
	  j other transport
	  k passports and visas.
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of selling travel-related products and services	1.1 Describe the main principles of service and information provision to customers			
	1.2 Explain the importance of up to date information systems			
	1.3 Explain the need for confidentiality and the implications of data protection legislation			
	1.4 Describe the main requirements of legislation when dealing with customers			
	1.5 Summarise the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers			
	1.6 Identify sources of information relating to products and services and how to interpret them			
	1.7 Outline organisational policies and procedures relating to the sale of products and services and explain the importance of following them			
	1.8 Summarise the main and current trade codes of practice when selling leisure or business travel			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to identify customers' travel needs	2.1	Offer travel products and services that best match the customer's needs			
		2.2	Record, process and store customer information to meet organisational procedures and legal requirements 2.3. Confirm any additional requirements with the customer			
		2.4	Present customers with clear responses to queries and solutions to issues			
		2.5	Provide the customer with clear and accurate information on travel services, costs, legal requirements and additional services at the close of the sale			
3	Be able to promote the features and benefits of travel products and services	3.1	Sell customers travel services that match their needs and are in line with organisational policies			
		3.2	Explain to the customer features of travel products and services that match their needs clearly			
		3.3	Confirm with the customer their understanding of travel products and services that match their needs			
		3.4	Promote benefits clearly, accurately and in a way which generates further interest from the customer			
		3.5	Give customers the opportunity to fully discuss and explore features and benefits			
		3.6	Deal with customers' objections positively			
		3.7	Describe clearly to the customer relevant terms, conditions and legal requirements relating to the sale			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to close the sale	4.1 Seek customers' intention to buy at a suitable time in the discussion			
	4.2 Identify and sell extra travel products and services that best match the customer's needs			
	4.3 Confirm with the customer the total cost of products and services			
	4.4 Comply with organisational and legal requirements in any follow-up with customers			
	4.5 Positively reassure customers following their buying decision			
	4.6 Ensure that the sale meets the organisational procedures and legal requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Understand how to identify customers' travel needs	5.1 Describe how to use selling techniques			
	5.2 Describe how to communicate effectively with customers in different sales situations			
	5.3 Describe the contractual responsibilities of the lead passenger			
	5.4 Describe the consequences of misrepresentation during discussions with customers			
	5.5 Illustrate the range of the organisation's products and services available			
	5.6 Describe key features of the products and destinations which are popular with your organisation's customers			
	5.7 Identify where information can be found on services			
	5.8 Describe the range of technologies available to you and how these can be used			
	5.9 Describe how the package of travel and additional services can be combined to match the needs of customers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Know how to promote the features and benefits of travel products and services	6.1 Identify names, locations and conditions of popular destinations and travel geography and features of destinations			
	6.2 Compare the different types of accommodation			
	6.3 Compare the different methods of paying for travel services			
	6.4 Describe how to use and interpret brochures and timetables to provide information and costing			
	6.5 Describe how to identify and interpret booking conditions and specific restrictions relating to the products and services offered by the organisation			
	6.6 Illustrate the range of the organisation's products and services available			
	6.7 Describe key features of the products and destinations which are popular with customers			
	6.8 Identify where information can be found on services			
7 Know how to close the sale	7.1 Summarise organisational and any legal requirements for advising customers			
	7.2 Summarise booking conditions and insurance requirements			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 29: Sell Multi-Sector Air Travel

Unit reference number:	K/601/6576
Level:	3
Credit value:	12
Guided learning hours:	93

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to identify customers' air travel requirements and options
What you must **DO**	The assessor <u>must</u> assess assessment criteria 2.1-2.6 by directly observing the learner's work.
LEARNING OUTCOME	**Be able to promote the features and benefits of different air travel arrangements**
What you must **DO**	The assessor must assess assessment criteria 4.1-4.6 by directly observing the learner's work.
LEARNING OUTCOME	**Be able to handle customers' objections**
What you must **DO**	The assessor must assess assessment criteria 6.1-6.4 by directly observing the learner's work.

The assessor may assess assessment criterion 6.5 through questioning or witness testimony if no naturally occurring evidence is available. |

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **two** from **follow on action**
	a ask a colleague for assistance
	b refer to a senior colleague
	c apologise for the inability to progress things further
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
LEARNING OUTCOME	**Be able to close the sale**
What you must **DO**	The assessor must assess assessment criteria 7.1-7.4 by directly observing the learner's work.
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **three** from **additional services**
	a car hire
	b VIP lounges
	c car parking
	d airport transfers
	e accommodation
	f insurance
	g other transport
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of selling multi-sector air travel	1.1 Explain why it is important to ensure that information provided to customers is accurate and up to date			
	1.2 Explain the need for confidentiality and the implications of data protection legislation			
	1.3 Explain why it is important to use personal knowledge, colleagues' experience and team work to display a professional attitude and create a positive impression			
	1.4 Explain travel agents' main responsibilities under current industry codes of practice			
	1.5 Discuss the consequences of misrepresentation during discussions with customers			
2 Be able to identify customers' air travel requirements and options	2.1 Summarise and confirm customers' travel requirements			
	2.2 Offer options which best match the customers' expressed needs			
	2.3 Explain any restrictions applicable to customers, using language they will understand			
	2.4 Promote air travel arrangements to customers in an appropriate manner			
	2.5 Take opportunities for selling additional services at a suitable time			
	2.6 Accurately record the outcomes of discussions with customers following organisational procedures			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know about world travel geography and air travel products, services and conditions	3.1	Identify continents and major countries			
		3.2	Identify major domestic and international tourist attractions and special events			
		3.3	Identify currencies and conversion rates in major destinations worldwide			
		3.4	Identify the official languages in major destinations worldwide			
		3.5	Describe the climate in major tourist destinations worldwide			
		3.6	Identify world time zones and describe the impact on travel arrangements			
		3.7	Explain how to read and interpret worldwide maps to identify the location of major airports, tourist destinations, capital cities, major cities and country groups			
		3.8	Describe British Citizen Passport and British Subject Passport requirements for UK departures			
		3.9	Describe visa types and where to find information on visa and passport entry requirements			
		3.10	Describe the different entry requirements for EU and non-EU passport holders to major destinations worldwide			
		3.11	Identify what information to give customers to enable them to find out current mandatory and recommended health precautions			
		3.12	Describe how to apply knowledge of visa and passport requirements to individual circumstances			
		3.13	Explain how to question customers about passports and visas			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to promote the features and benefits of different air travel arrangements	4.1	Describe the main features of air travel arrangements that match customer needs			
		4.2	Generate further interest from customers			
		4.3	Interpret buying signals correctly and act upon them			
		4.4	Create opportunities for customers to fully discuss and explore features and benefits			
		4.5	Promote travel services using methods that fully comply with organisational policies			
		4.6	Describe air travel arrangements in ways that meet current industry codes of practice and legal requirements			
5	Know about multi-sector air travel-related products and services	5.1	Describe sources of information relating to air travel services and how to use and interpret them			
		5.2	Describe the content of the current IATA knowledge specification at a minimum of Level 1, including fundamental knowledge of the BSP system			
		5.3	Identify the main types of air products and suppliers			
		5.4	Describe the types and functions of Global Distribution Systems (GDS)			
		5.5	Explain car rental terms and abbreviations			
		5.6	Describe the main conditions of car rental including eligibility			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	5.7	Explain how to use and interpret reference sources to provide car hire information and costs on different groups and models			
	5.8	Describe the car insurance provision offered by the car hire suppliers used by organisation			
	5.9	Describe the features, benefits and costs of VIP lounges			
	5.10	Identify main suppliers and restrictions to VIP lounge access			
	5.11	Identify the location of parking sites in relation to major UK departure airports			
	5.12	Describe the services offered by the main car parking organisations in the UK			
	5.13	Identify where to access car parking charges and how to calculate costs			
	5.14	Identify where to access information on the type and availability of transfers at major destination airports worldwide			
	5.15	Describe how to purchase a transfer when not included in the price of flight tickets or accommodation booked			
	5.16	Identify where to access and how to interpret information on onward transportation options worldwide			
	5.17	Explain the different types of accommodation			
	5.18	Describe official grading and categorisations for accommodation			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.19 Explain the terminology used when making accommodation only reservations			
	5.20 Describe the different methods of booking and paying for accommodation only, including the implications of guaranteed reservations			
	5.21 Explain the types of travel insurance available including amounts of cover, conditions, exclusions and excesses			
	5.22 Identify the differences and limitations of business insurance and leisure insurance, including sports cover			
	5.23 Describe how to find the customer's eligibility for different insurance products			
	5.24 Identify and explain relevant booking conditions and restrictions so that they are understood by your customers			
	5.25 Describe service charges and when they need to be applied			
	5.26 Explain how to calculate service and credit card charges			
6 Be able to handle customers' objections	6.1 Clarify customers' objections			
	6.2 Resolve customers' objections where possible			
	6.3 Match possible alternative solutions to customers' needs			
	6.4 Take suitable follow-on action when objections cannot be resolved			
	6.5 Build and retain customers' confidence			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
7	Be able to close the sale	7.1	Reassure customers when they confirm their intentions to buy			
		7.2	Calculate the total costs of all services agreed and advise customers			
		7.3	Complete sales following organisational procedures and in compliance with legal requirements			
		7.4	Take opportunities to promote and sell additional services			
8	Know how to sell multi-sector air travel to customers	8.1	Explain organisational procedures relating to the sale of air travel services and the importance of following them			
		8.2	Describe your organisation's requirements for preferred operators			
		8.3	Explain how to use selling techniques to make sales			
		8.4	Explain your legal obligations when advising customers, including general requirements of air travel legislation			
		8.5	Summarise legislation relating to multi-sector air travel			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 30:   Sell Tailor-Made Travel Services

Unit reference number:	T/601/6578
Level:	3
Credit value:	10
Guided learning hours:	75

Unit summary

This unit supports workforce development for those who sell tailor-made travel services.

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

Evidence requirements

LEARNING OUTCOME	Be able to investigate customers' travel needs
What you must **DO**	The assessor must assess assessment criteria 2.1-2.4 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	   – **both** from **questioning techniques**
	     a open questioning
	     b closed questioning
	   – at least **two** from **options**
	     a routings
	     b modes of transport
	     c types of accommodation
	     d costings
	     e places of interest
	     f local culture and customs
	     g special interests
	   – At least **one** from **records of customer enquiries and needs**
	     a to improve efficiency of service for customer
	     b for analysis to build customer profiles
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	**Be able to deliver tailor-made travel**
What you must **DO**	The assessor must assess assessment criteria 3.1-3.6 by directly observing the learner's work.
LEARNING OUTCOME	**Be able to settle the agreed transaction**
What you must **DO**	The assessor must assess assessment criteria 11.1-11.4 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	   – **all** from **requirements**
	     a organisational
	     b legal
	     c industry codes of practice
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of selling tailor-made travel services	1.1	Explain how to identify customers' requirements for tailor-made travel			
		1.2	Describe the role of proposals in negotiating and finalising tailor-made travel transactions			
		1.3	Explain the organisation's procedures relating to the sale of travel services and the importance of following them			
		1.4	Explain how the organisation's objectives and own personal targets influence the selling of tailor-made travel services			
2	Be able to investigate customers' travel needs	2.1	Confirm the customers' travel needs using appropriate questioning techniques			
		2.2	Make customers aware of the range of possible options to best meet their expectations and enhance their travel experience			
		2.3	Present customers with a range of travel options from different relevant suppliers			
		2.4	Record customer enquiries and needs and ensure these are processed correctly			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to deliver tailor-made travel	3.1	Create written and verbal proposals that meet customers' needs			
		3.2	Present details and costs of travel itineraries, which are likely to meet or exceed customer expectations			
		3.3	Present suitable alternatives where proposals do not specifically match customers' original requirements			
		3.4	Ensure that the proposals meet legal and industry codes of practice requirements			
		3.5	Ensure proposals meet customer expectations and the organisation's sales objectives			
		3.6	Answer customers' queries and objections accurately			
4	Know the legislation and policy regarding the advice offered to customers	4.1	Explain the importance of ATOL in relation to tailor-made holidays including: – the protection it offers – when an ATOL licence is required – which products are and are not covered by ATOL protection			
		4.2	Explain the consequences of misrepresentation during discussions with customers			
		4.3	Explain the importance of containing costs and the organisation's policy relating to this			
		4.4	Describe import and export limits imposed by certain countries			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	4.5	Explain the implications of using internal and/or external sourcing in relation to ATOL and package holiday legislation			
	4.6	Describe the main industry trade associations, their main purposes and the benefits of membership to travel organisations and customers			
	4.7	Summarise British Citizen Passport and British Subject Passport requirements for UK departures			
	4.8	Identify sources of information for visa and passport entry requirements			
	4.9	Describe the different entry requirements for EU and non-EU passport holders to major destinations worldwide			
	4.10	Identify what information to give customers to enable them to find out current mandatory and recommended health precautions			
	4.11	Describe the relationship between agents and principals			
5 Know about a range of tailor-made travel products and services to meet customers' needs	5.1	Describe the types of travel insurance available including amounts of cover, conditions, exclusions and excesses			
	5.2	Provide examples of the questions to ask to determine customers' eligibility for insurance			
	5.3	Compare sources of foreign exchange and how to obtain them			
	5.4	Describe the main types of air travel products and suppliers			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	5.5	Explain vehicle rental basic terms and abbreviations			
	5.6	Compare the official grading schemes operating within countries worldwide			
	5.7	Describe the different types of accommodation			
	5.8	Describe the different methods of booking and paying for accommodation only, including the implications of guaranteed reservations			
	5.9	Explain the terminology used when making accommodation only reservations, the main types of products and categories of principals, including specialist products and principals			
	5.10	Identify the commissions payable by different suppliers			
	5.11	Explain what service charges are and when they need to be applied			
	5.12	Explain how to encode and decode 3-letter airport codes and 2-letter airline codes			
	5.13	Interpret sources of European and worldwide travel information			
	5.14	Explain how to use and interpret relevant brochures, timetables, fare schedules and price lists to provide information and costings			
	5.15	Describe factors which can restrict the availability of some products, services and travel options			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Know about cruise products and services	6.1	Describe different cruise operators, routes, ship types, capacity and tonnage			
		6.2	Locate major cruise ports			
		6.3	Describe cruise terms and cabin types			
		6.4	Explain the differences between cruise and other travel products			
		6.5	Explain how to use and interpret cruise brochures to provide information on different types of cruise, European and worldwide, including: – fly/cruise – special interest – round the world and cruise and stay			
		6.6	Explain how to use and interpret cruise brochures to provide information on: – deck plans – on-board facilities – excursions – entertainment – restaurant sittings			
		6.7	Describe how to provide costings for all types of cruise			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
7	Know about a range of destinations	7.1	Identify the names and locations of UK towns, cities, gateway airports and seaports and physical features, UK tourist attractions, regions and resorts and national parks			
		7.2	Identify, in relation to outbound travel from the UK, the location of continents, countries, capitals, resorts, gateway airports and seaports, major towns, cities, tourist attractions, oceans and seas and main physical features			
		7.3	Describe the climate, time zones, currencies and languages of outbound travel destinations			
		7.4	Describe the food, clothing, shopping, entertainment, culture and special events available in a range of outbound travel destinations			
8	Know how to create tailor-made travel itineraries	8.1	Explain how to put together an itinerary to achieve the best logical and economical sequence of events			
		8.2	Explain how to arrange a travel itinerary including – transfer – accommodation – sightseeing – stopover packages			
		8.3	Describe how to apply knowledge of visa and passport requirements to individual circumstances			
		8.4	Describe how to provide air travel costings and information on booking conditions			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	8.5 Describe how to calculate service and credit card charges according to supplier's and your organisation's guidelines			
	8.6 Describe how and when to use the phonetic alphabet			
	8.7 Identify how and when to question customers about passports and visas			
	8.8 Compare business insurance with leisure insurance to find the best deal for the customer			
	8.9 Explain the implications of the disability discrimination legislation when giving advice and information to customers			
	8.10 Explain how to calculate local times, distances and elapsed journey times			
	8.11 Describe how to check the different booking conditions attached to travel products and services and any relevant restrictions			
	8.12 Describe how to use and interpret reference sources to provide costings (in sterling) and information on different groups and models of rental vehicle including: – main conditions of rental including eligibility – insurance including collision damage waivers – personal accident insurance – additional insurance			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
9 Understand the policy and legislation that may influence limits of tailor-made travel options	9.1 Explain the organisation's main responsibilities under current industry codes of practice			
	9.2 Describe the organisation's position on preferred operators			
	9.3 Explain how to balance the organisation's needs with those of the customer			
	9.4 Explain the need for confidentiality and the implications of data protection legislation			
	9.5 Explain the importance of following Foreign Office advice			
	9.6 Explain the legal implications of indemnities, advertising, contractual relationships and acting on behalf of customers and principals			
	9.7 Explain the organisational, legal and industry codes of practice to which agreements with customers and records must conform			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
10	Know how to propose tailor-made travel options to customers	10.1	Explain ways to avoid difficulties arising from the mismatch of proposals and customers' requirements and present alternatives			
		10.2	Describe how to anticipate customer queries in response to proposals			
		10.3	Describe how to present the proposals in a manner which is appropriate to the customer			
		10.4	Explain relevant booking conditions and restrictions so that they are understood by customers			
		10.5	Identify own limits of authority for modifying proposals			
		10.6	Explain how to identify unresolved aspects of proposals			
		10.7	Explain how to influence customers' decisions by using experience and knowledge to overcome objections			
		10.8	Describe how to listen and respond sensitively and develop points and ideas			
		10.9	Explain how to build rapport to encourage open dialogue and seek further information on customers' needs by: – matching language and style to suit the situation – structuring what is said to help customers follow a line of thought or number of points clearly – using verbal or visual illustrations to help customers understand any points			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
11 Be able to settle the agreed transaction	11.1 Reach an agreement on the supply of travel services to which all parties agree			
	11.2 Reassure customers about their choices following their decision to buy			
	11.3 Summarise and accurately record the agreement reached			
	11.4 Complete the transaction to meet organisational procedures and legal requirements			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 31: Build and Maintain Customers' Profiles

Unit reference number:	D/601/6610
Level:	3
Credit value:	3
Guided learning hours:	20

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to obtain personal travel details
What you must **DO**	The assessor must assess assessment criteria 2.1-2.5 and 2.7 by directly observing the learner's work.
	The assessor may assess assessment criterion 2.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	   – at least **four** from **contact details**
	     a name and title
	     b relevant address/es
	     c telephone numbers
	     d electronic communication details
	     e organisation department
	
	   – at least **four** from **personal travel preferences**
	     a seating
	     b room type
	     c car hire
	     d airline
	     e departure airport
	     f smoking
	     g diet
	     h mobility requirements
	     i visual and hearing requirements
	
	   – at least **four** from **travel document data**
	     a passport number and expiry date
	     b nationality
	     c visa's held
	     d vaccination certificates held and expiry dates
	     e restricted entry endorsements
	     f insurance details
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	**Be able to compile and maintain personal travel profiles**
What you must **DO**	The assessor may assess assessment criteria 3.1-3.8 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the value of accurate account tracking and management	1.1 Explain the benefits of travel profiling 1.2 Explain the importance of keeping files up-to-date and circumstances which will require an update 1.3 Explain the importance of recording data accurately 1.4 Explain the importance of ensuring profiles are compatible with travel offers and supplier availability 1.5 Explain why it is important to check profile details and agree changes with the relevant person 1.6 Explain the need for confidentiality and the implications of the data protection legislation			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to obtain personal travel details	2.1 Obtain accurate and up-to-date personal contact details			
	2.2 Add accurate and up-to-date personal contact details to profiles			
	2.3 Maintain the traveller's personal travel preferences and travel document data so that it is accurate and up-to-date			
	2.4 Confirm that any information to be used is still accurate and current prior to compiling or updating the traveller's profile			
	2.5 Keep all information secure and available only to authorised people following organisational procedures			
	2.6 Apply cost-effective, time-efficient and ethical means to gather, store and retrieve customer information			
	2.7 Comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to compile and maintain personal travel profiles	3.1	Accurately record and update personal travel document data in response to changes			
		3.2	Check that travellers' profiles are compatible with the organisation's travel offer and supplier availability			
		3.3	Ensure profile contents accurately reflect customers' requirements and preferences within the boundaries of any agreed travel policies			
		3.4	Agree traveller profiles with the relevant person(s) prior to inputting the information on the organisation's system			
		3.5	Maintain traveller profiles in the required format			
		3.6	Store the completed and agreed profiles securely, following organisational procedures			
		3.7	Make profiles available and accessible to all authorised people			
		3.8	Check that customers' profiles are fit for purpose and adjust collection and analysis processes as necessary			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
4 Know how to build and maintain personal travel profiles	4.1	Describe a variety of different customers and their real and perceived travel needs			
	4.2	Explain how and where to access detailed information on supplier' products and services			
	4.3	Identify sources of personal information from within customer organisations			
	4.4	Describe the type, quantity and quality of personal information to collect			
	4.5	Identify the relevant person who can confirm the accuracy of data			
	4.6	Describe customers' agreed and current travel policy			
	4.7	Explain the required format for personal profiles			
	4.8	Identify who has access to personal profiles			
	4.9	Outline organisational security procedures for keeping personal data safe and secure			
	4.10	Explain how to access and use organisation's Global Distribution System (GDS)			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 32: Contribute to Maintaining the Quality of Travel and Tourism Operations

Unit reference number: L/601/6599

Level: 3

Credit value: 5

Guided learning hours: 37

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to help maintain the quality and security of operations
What you must **DO**	The assessor may assess assessment criteria 2.1-2.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– **both** from **operations**
	a **for the benefit of customers**
	b **to meet the needs of the organisation**
	– at least **three** from **security procedures**
	a **cash (and equivalents)**
	b **staff**
	c **customers**
	d **premises**
	e **equipment**
	f **information**
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
LEARNING OUTCOME	**Be able to help maintain the standard of supplied goods and services**
What you must **DO**	The assessor may assess assessment criteria 3.1-3.4 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the importance of maintaining standards	1.1	Explain the importance of monitoring operations and taking prompt remedial action			
		1.2	Explain why it is important to identify the causes of problems and take effective action to resolve them and prevent their recurrence			
		1.3	Explain the importance of keeping self and colleagues up-to-date on quality assurance and security procedures			
		1.4	Explain the importance of maintaining and enhancing customer and supplier goodwill and the image of the organisation			
2	Be able to help maintain the quality and security of operations	2.1	Ensure that less experienced colleagues are aware of: – the standards of performance expected of them – the systems in place to measure standards of performance			
		2.2	Monitor operations and security procedures against given measures at specified intervals			
		2.3	Promptly rectify any operational deficiencies			
		2.4	Implement agreed changes and improvements according to instructions			
		2.5	Complete quality assurance records and reports accurately			
		2.6	Forward completed quality assurance records and reports to the correct person			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to maintain the quality of travel and tourism operations	3.1	Identify variations from specification in the delivery of contracted products and services			
		3.2	Report reasons for variations from specifications to the appropriate person			
		3.3	Follow correct procedures to minimise the effects on customers of products and services being below specification			
		3.4	Maintain the goodwill of external suppliers and the good image of the organisation			
4	Know how to help maintain the quality of travel and tourism operations	4.1	Describe the types of supplier problems that can commonly affect customers			
		4.2	Describe the types of measures available for quality assuring on-site travel and tourism operations, security and supplier performance			
		4.3	Describe quality control and monitoring systems used in the organisation and how to apply them			
		4.4	Summarise the contractual obligations of the suppliers in the area(s) for which you are responsible			
		4.5	Describe the standards of personal performance, service and conduct for the organisation			
		4.6	Describe how to deal with operational quality failures			
		4.7	Identify the items in the area where you work that are classified as 'high value' and subject to special security arrangements			
		4.8	Identify key holders responsibilities and how to contact them			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	4.9	Describe role and responsibilities in ensuring the quality of operations, maintaining security and the delivery of services by suppliers			
	4.10	Identify and summarise organisational policies and procedures covering all workplace operations, security and services provided to customers			
	4.11	Outline organisational and local policies for sustainable tourism and how they should be implemented			
	4.12	Summarise aspects of current data protection legislation relevant to the information that is stored			
	4.13	Describe the type(s) of organisational quality control records and how and when to complete them			
	4.14	Identify the person(s) to whom to report any quality related problems			
	4.15	Describe how to deal with suppliers and others when things go wrong			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 33: Contribute to Supporting and Developing Colleagues

Unit reference number: T/601/6600

Level: 3

Credit value: 6

Guided learning hours: 44

Unit summary

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

The unit is designed for use primarily by supervisors, subject experts and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to arrange and carry out team briefings to support and develop colleagues
What you must **DO**	The assessor may assess assessment criteria 2.1-2.11 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	  − at least **three** from **team briefings**
	    a product updates
	    b organisational updates
	    c supplier promotions
	    d competitors activities
	    e sharing customer feedback
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to support and train colleagues to improve effectiveness and personal development
What you must **DO**	The assessor may assess assessment criteria 4.1-4.8 through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for: – at least **three** from **organisational and any legal requirements** a **performance management** b **employment law** c **diversity policy** d **staff welfare requirements** e **retention policy** Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of supporting and developing colleagues	1.1 Explain the importance of making sure colleagues understand what they have to do			
	1.2 Explain the importance of making sure colleagues continue to be supported until they can achieve the standard required			
	1.3 Explain why team briefings are important to the work of the organisation			
	1.4 Explain the importance of discussing issues with colleagues absent from team briefings			
	1.5 Identify ways in which issues can be discussed with those who cannot attend the briefings			
	1.6 Explain the importance of acknowledging colleagues' achievements			
	1.7 Explain the importance of complying with local and UK employment law when supporting and developing colleagues			
	1.8 Explain the importance of staff retention to the organisation's operations			
	1.9 Explain how organisational requirements affect support for colleagues			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to arrange and carry out team briefings to support and develop colleagues	2.1	Obtain accurate information for team briefings from relevant sources			
		2.2	Arrange team briefings conveniently for colleagues			
		2.3	Explain the objectives of team briefings to colleagues clearly			
		2.4	Prepare all necessary information for team briefings			
		2.5	Present confidently and clearly, accurate information to colleagues at team briefings			
		2.6	Conduct relevant team briefings to schedule			
		2.7	Fulfil and maintain the objectives of team briefings			
		2.8	Encourage colleagues to contribute to team briefings			
		2.9	Offer feedback to colleagues when necessary			
		2.10	Confirm that colleagues have understood the content of team briefings			
		2.11	Deal with any misunderstandings before closing team briefings			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to plan and provide team briefings	3.1 Explain the importance of arranging team briefings conveniently for colleagues			
	3.2 Explain the importance of ensuring colleagues are aware of the objectives of team briefings			
	3.3 Explain the importance for colleagues to contribute to team briefings			
	3.4 Explain how to encourage colleagues to contribute to team briefings			
	3.5 Describe the importance of achieving the objectives of team briefings			
	3.6 Explain why all instructions given and demonstration of tasks need to conform to legal and organisational requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to support and train colleagues to improve effectiveness and personal development	4.1	Make all colleagues aware of the skills and knowledge that can be shared within a team to help improve and/or assist with effectiveness			
		4.2	Offer colleagues support in areas which can be confidently and competently demonstrated			
		4.3	Identify and provide suitable support/assistance to colleagues as soon as is required			
		4.4	Allow colleagues to practice demonstrated tasks under supervision until they are confident and competent			
		4.5	Give colleagues clear and structured instructions and explanations using language at an appropriate level			
		4.6	Give colleagues relevant and sufficient information to meet work needs			
		4.7	Ensure colleagues understand all work expectations and any misunderstandings are corrected			
		4.8	Provide instructions and task demonstrations that are in line with organisational and legal requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know how to support colleagues to improve their effectiveness and personal development	5.1 Identify areas in which support for colleagues is required 5.2 Describe the implications of undermining colleagues' confidence 5.3 Describe how discussions can be kept relevant to an agenda 5.4 Describe the consequences of discussions becoming irrelevant to an agenda 5.5 Describe how to recognise a colleague in need of support 5.6 Explain how to instruct colleagues and demonstrate tasks clearly and correctly 5.7 Describe how to provide constructive feedback 5.8 Identify resources within in the organisation capable of providing support			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 34: Monitor and Solve Customer Service Problems

Unit reference number:	J/601/1515
Level:	3
Credit value:	6
Guided learning hours:	40

Unit summary

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

Assessment requirements

The assessment and quality assurance requirement for this unit provides evidence towards A and V units.

These evidence requirements were developed by the Institute of Customer Service (ICS). Learners must produce evidence for each of the requirements stated.

1 Learners' evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit.

2 Learners may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3 Learners must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4   Learners' evidence must include examples of problems which are:
    a   brought to your attention by customers
    b   are identified first by you and/or by a colleague.

5   The problems included in your evidence must include examples of a:
    a   difference between customer expectations and what is offered by your organisation
    b   problem resulting from a system or procedure failure
    c   problem resulting from a shortage of resources or human error.

6   Learners must show that you have considered the options for solving problems from the point of view of:
    a   your customer
    b   the potential benefits to your organisation
    c   the potential risks to your organisation.

7   Learners must provide evidence that you have made use of options that:
    a   follow organisational procedures or guidelines
    b   make agreed and authorised exceptions to usual practice.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Solve immediate customer service problems	1.1 Respond positively to customer service problems following organisational guidelines			
	1.2 Solve customer service problems when they have sufficient authority			
	1.3 Work with others to solve customer service problems			
	1.4 Keep customers informed of the actions being taken			
	1.5 Check with customers that they are comfortable with the actions being taken			
	1.6 Solve problems with service systems and procedures that might affect customers before customers become aware of them			
	1.7 Inform managers and colleagues of the steps taken to solve specific problems			
2 Identify repeated customer service problems and options for solving them	2.1 Identify repeated customer service problems			
	2.2 Identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option			
	2.3 Work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Take action to avoid the repetition of customer service problems	3.1	Obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated			
		3.2	Action their agreed solution			
		3.3	Keep their customers informed in a positive and clear manner of steps being taken to solve any service problems			
		3.4	Monitor the changes they have made and adjust them if appropriate			
4	Understand how to monitor and solve customer service problems	4.1	Describe organisational procedures and systems for dealing with customer service problems			
		4.2	Describe the organisational procedures and systems for identifying repeated customer service problems			
		4.3	Explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers			
		4.4	Explain how to negotiate with and reassure customers while their problems are being solved			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 35:   Contribute to Business Travel Account Management

Unit reference number: R/601/5776

Level: 3

Credit value: 6

Guided learning hours: 44

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to monitor clients' business travel usage
What you must **DO**	The assessor may assess assessment criteria 2.1-2.3 through questioning, witness testimony or other documentary evidence demonstrating competence.
LEARNING OUTCOME	**Be able to maintain travel-related information**
What you must **DO**	The assessor must assess assessment criteria 3.1-3.3 by directly observing the learner's work.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	 – at least **four** from **sources**
	    a **supplier updates**
	    b **global distribution systems (GDS)**
	    c **trade press**
	    d **internet**
	    e **intranet**
	    f **organisations or consortia's briefings**
	 Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to assist customers to keep within travel policies
What you must **DO**	The assessor must assess assessment criteria 3.1-3.3 by directly observing the learner's work.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of business travel account management	1.1 Explain the purpose of business travel profiles and how they are used when arranging travel			
	1.2 Explain how the information supplied will inform the Management Information System (MIS)			
	1.3 Explain the implications of supplying inaccurate information to a Management Information System (MIS)			
	1.4 Explain the need for confidentiality and the implications of the data protection legislation			
	1.5 Describe a business travel agent's main responsibilities under current industry codes of practice			
	1.6 Explain the importance of following organisational procedures relating to the sale of travel services			
	1.7 Explain the importance of containing costs			
	1.8 Explain the importance of following Foreign Office advice			
	1.9 Explain the consequences of misrepresentation with regard to restricted price procedures			
	1.10 Describe the relevant parts of the disability discrimination legislation and its implications when giving advice and information to travel customers			
	1.11 Explain the legal requirements for accurate quotations and record keeping			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to monitor clients' business travel usage	2.1	Record and track travel arrangements and costs accurately against agreed current travel policies			
		2.2	Ensure that information is valid and accurate when used in cost control analysis			
		2.3	Supply accurate business travel usage information to the relevant person(s) in the correct format and at the time required			
3	Be able to maintain travel-related information	3.1	Gather reliable and current travel-related information from relevant sources on a regular and frequent basis using time- and cost-effective methods			
		3.2	Supply accurate and current travel-related information and advice to assist the updating of travel policies promptly to the relevant person(s)			
		3.3	Provide accurate business travel usage information to relevant person when required and in the correct format			
4	Know how to maintain business travel-related information	4.1	Identify suitable sources of business travel information			
		4.2	Describe how to access suitable sources of business travel information			
		4.3	Identify where to access information on ground transport arrangements in major cities worldwide			
		4.4	Identify where to find information on the surface transportation available within different countries			
		4.5	Describe car rental terminology and abbreviations			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	4.6	Describe the main types of air and rail products and suppliers			
	4.7	Identify where to find information on available airport services			
	4.8	Describe 3-letter airport codes, 2-letter airline codes and how to encode and decode them			
	4.9	Identify where to find information on airport facilities for key gateways and transfer points			
	4.10	Describe British Citizen Passport and British Subject Passport requirements for UK departures			
	4.11	Describe visa types and where to find information on visa and passport entry requirements			
	4.12	Describe the different entry requirements for EU and non-EU passport holders to major destinations worldwide			
	4.13	Describe what information to give customers to enable them to find out current mandatory and recommended health precautions			
	4.14	Compare the official grading schemes operating within countries worldwide and the differences between them			
	4.15	Identify where to find information on accommodation availability			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to assist customers to keep within travel policies	5.1	Establish accurate, complete and current traveller profiles with the travel booker			
		5.2	Compare requested travel arrangements against the traveller's current profile and company travel policy before making any travel arrangements			
		5.3	Identify any deviations from current policy			
		5.4	Guide the traveller to gain required authorisation			
		5.5	Make suitable and cost effective alternative recommendations to enable travellers to keep within budget and meet requirements			
		5.6	Ensure that travellers are aware of any current incentives that would enable them to keep within budget and or enjoy improved services			
		5.7	Report any infringements of travel policy to the relevant person(s) following organisational procedures			
6	Know how to assist customers with travel arrangements whilst keeping within company travel policies	6.1	Identify where to access the approved profiles for travellers			
		6.2	Identify when and where to obtain authorisation for travel arrangements outside policy and in short notice situations			
		6.3	Describe organisational procedures relating to the sale of travel services and its importance			
		6.4	Describe organisational requirements on preferred operators			
		6.5	Describe organisation policies relating to containing costs			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	6.6	Outline organisational, legal and industry codes of practice to which agreements with customers and records must conform			
	6.7	Describe procedure for reporting infringements of travel policy			
	6.8	Identify where to access travel security information			
	6.9	Describe the travel policies of your customers and how and where to access them			
	6.10	Describe how to use the Global Distribution System (GDS)			
	6.11	Describe how to use and interpret reference sources to provide costings and information on different groups and models of rental vehicle, main conditions of rental including eligibility			
	6.12	Describe how to provide air and rail travel costings and information on booking conditions			
	6.13	Describe how to calculate local times, distances and elapsed journey times			
	6.14	Describe how to apply knowledge of visa and passport requirements to individual circumstances			
	6.15	Describe how to question customers about passports and visas			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 36: Organise and Implement Travel and Tourism Promotional Activities

Unit reference number: T/601/5785

Level: 3

Credit value: 4

Guided learning hours: 31

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to plan promotional activities
What you must **DO**	The assessor may assess assessment criteria 2.1-2.7 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	- at least **three** from **resources** **a time** **b funding** **c people** **d materials** **e location/space** - at least **three** from **legal requirements** **a health** **b safety** **c security** **d confidentiality** - at least **two** from **plans** **a aims** **b objectives** **c activities** **d resources** **e success criteria** **f costing** **g roles and responsibilities** **h methods of evaluation** Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
LEARNING OUTCOME	**Be able to implement promotional activities**
What you must **DO**	The assessor may assess assessment criteria 3.1-3.4 through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for: **both** from **promotional resources** **a display materials** **b information materials** Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
LEARNING OUTCOME	**Be able to evaluate and revise promotional activities**
What you must **DO**	The assessor may assess assessment criteria 4.1-4.4 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the organisation and implementation of promotional activities	1.1	Explain the roles of promotional activities in the wider context of marketing products and services			
		1.2	Identify and describe factors affecting the success of promotional activities in travel and tourism			
		1.3	Summarise legislation and regulation relevant to promotional activities being planned and undertaken			
2	Be able to plan promotional activities	2.1	Agree the aims, objectives and success criteria of promotional activities with the relevant person(s)			
		2.2	Encourage others to contribute ideas for promotional activities			
		2.3	Secure resources for the promotional activities			
		2.4	Plan activities to meet organisational needs, procedures and legal requirements			
		2.5	Plan contingency arrangements to take account of predictable problems			
		2.6	Present plans in a format to suit the needs of all others involved			
		2.7	Make suitable arrangements for the evaluation of the promotional activities			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to implement promotional activities	3.1	Undertake promotional and evaluation activities according to the agreed plan			
		3.2	Check that suitable promotional resources are available and meet the quality and quantity needs of the activities			
		3.3	Resolve any problems to minimise disruption			
		3.4	Notify any necessary changes to the plan to all those affected			
4	Be able to evaluate and revise promotional activities	4.1	Evaluate promotional activities against the planned objectives and success criteria			
		4.2	Report the results of the evaluation promptly, clearly and accurately to the relevant person(s)			
		4.3	Use outcomes of the evaluation to inform the type, use and content of future promotional activities			
		4.4	Make recommendations for future activities that are supported by evaluation information			
5	Know how to organise and implement travel and tourism promotional activities	5.1	Describe the promotional needs and procedures of the organisation			
		5.2	Describe the features of the travel and tourism products and services to be promoted			
		5.3	Describe organisational procedures for sourcing and securing promotional resources			
		5.4	Explain the outcomes of previous promotional activities run by the organisation			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 37: Generate Increased Travel and Tourism Sales

Unit reference number: T/601/6533

Level: 3

Credit value: 5

Guided learning hours: 46

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to source contacts to increase potential sales
What you must **DO**	The assessor may assess assessment criteria 2.1-2.3 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	  – at least **two** from **sales leads**
	    a recent customer enquiries not converted to sales
	    b recently returned travellers
	    c repeat customers
	    d colleague suggestions
	
	  – at least **one** from **products and services**
	    a core products
	    b additional products and services
	
	  – at least **one** from **methods**
	    a telephone
	    b post
	    c email
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to promote travel and tourism products and services
What you must **DO**	The assessor may assess assessment criteria 3.1-3.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	  − at least **two** from **details of customer contact**
	
	  a **customer information**
	  b **further action**
	  c **sales**
	  d **referrals**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to evaluate success in increasing sales
What you must **DO**	The assessor may assess assessment criteria 3.1-3.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of increasing travel and tourism sales	1.1 Describe the purpose and value of local direct sales drives in promoting sales and identifying customers' needs			
	1.2 Explain the importance of carefully monitoring customers' reactions during sales conversations			
	1.3 Explain the importance of recording customers' response to sales offerings			
	1.4 Explain the influence that economic and social conditions can have on customers' reactions to travel and tourism sales drives			
	1.5 Explain the importance of providing only accurate and relevant information to potential customers			
2 Be able to source contacts to increase potential sales	2.1 Identify agreed sales-drive objectives and evaluation methods with the relevant person(s)			
	2.2 Select potential sales leads according to agreed criteria			
	2.3 Identify potential products and services of interest to customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to promote travel and tourism product and services	3.1	Contact customers and sales leads effectively			
		3.2	Promote products and services based on customers' previous buying history and potential needs			
		3.3	Identify opportunities for up-selling and switch-selling			
		3.4	Adapt sales techniques to suit customers' reactions			
		3.5	Provide valid information to suit customers' requirements			
		3.6	Record customer contact details accurately			
4	Be able to evaluate success in increasing sales	4.1	Compare sales drive objectives with actual sales agreed			
		4.2	Compare and explain discrepancies between sales achieved and agreed objectives			
		4.3	Provide recommendations for future sales-drives based on accurate evaluation			
		4.4	Provide recommendations for future sales-drives to the relevant person(s)			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Know how to generate increased sales of travel and tourism products and services	5.1	Compare the benefits and limitations of different means of contacting customers			
		5.2	Describe how to use a customer database to identify potential sales leads			
		5.3	Describe how to use selling techniques to make sales			
		5.4	Describe how to adapt a sales approach to suit different customers' reactions			
		5.5	Outline the range of customers needs for travel and tourism products and services			
		5.6	Identify current economic and social conditions that affect the purchasing of travel and tourism products and services			
		5.7	Describe ways of evaluating the success of sales-drives			
		5.8	Describe how information can be presented to customers to generate interest in travel and tourism products and services			
		5.9	Describe how to up-sell and switch-sell			
		5.10	Identify the range, features and prices of available travel and tourism products and services			
		5.11	Describe current promotional deals and sales objectives			
		5.12	Identify the main travel and tourism products and services offered by competitors			
		5.13	Identify with whom you can refer customer contacts and share information			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 38: Monitor Business Performance

Unit reference number: J/601/6536

Level: 3

Credit value: 4

Guided learning hours: 33

Unit summary

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

The unit is designed for use primarily by managers and supervisors in leisure and business travel agencies, tour operator field staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to monitor and improve business performance
What you must **DO**	The assessor may assess assessment criteria 2.1-2.5 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	   – at least **one** from **targets and performance indicators**
	   a sales
	   b costs
	   c service provision
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand business performance monitoring	1.1 Explain the key factors that can affect business performance in the travel and tourism industry			
	1.2 Explain the importance of involving staff in the collection and analysis of performance data			
	1.3 Describe how to identify key business targets and performance indicators by which business performance might be judged			
	1.4 Identify what information on business performance needs to provided to others			
2 Be able to monitor and improve business performance	2.1 Identify level of achievement of key business targets and performance indicators			
	2.2 Ensure that relevant business records are accurate and up-to-date			
	2.3 Investigate the causes of significant variations between planned and actual performance			
	2.4 Encourage colleagues to make suggestions for improving business performance			
	2.5 Develop viable plans for improving business performance			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to monitor and improve business performance	3.1	Explain how to keep accurate and up-to-date records			
		3.2	Describe current operational features in the organisation			
		3.3	Describe how to analyse business performance data			
		3.4	Describe a range of internal and external factors that may cause variations between target performance and that achieved			
		3.5	Describe current market conditions in the industry and their possible effects on business performance			
		3.6	Identify how frequently actual business performance needs to be checked to obtain reliable data			
		3.7	Describe current local market conditions and the effects on the performance of the organisation			
		3.8	Describe the consequences of possible changes in operational processes			
		3.9	Explain the roles of colleagues and the effects that they may have on business performance			
		3.10	Describe means of presenting ideas for measures to improve business performance			
		3.11	Describe any required presentation formats for business performance information			
		3.12	Describe how to assess the availability of resources needed to implement possible improvements			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 39: Analyse, Evaluate and Present Tourism Data

Unit reference number: D/601/6574

Level: 3

Credit value: 4

Guided learning hours: 28

Unit summary

This unit supports workforce development for those who are engaged in tourism data analysis for colleagues and managers, eg tour operators, tourism organisations and tourist information service providers and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to analyse and evaluate tourism data
What you must **DO**	The assessor must assess assessment criteria 2.1 and 2.2 by directly observing the learner's work. The assessor may assess assessment criteria 2.3-2.5 through questioning, witness testimony or other documentary evidence or other documentary evidence demonstrating competence.
LEARNING OUTCOME	**Be able to present the results of tourism data analysis**
What you must **DO**	The assessor may assess assessment criteria 4.1-4.6 through questioning, witness testimony or documentary evidence demonstrating competence

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	– at least **one** from **reports**
	
	    a written
	
	    b oral
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand processes for analysing and evaluating tourism data	1.1 Explain the importance of factual reporting			
	1.2 Explain the importance of maintaining confidentiality and security when handling tourism data			
	1.3 Describe the operating implications of current data protection legislation			
2 Be able to analyse and evaluate tourism data	2.1 Confirm the purpose of the data analysis with the relevant person			
	2.2 Agree with the relevant person the required analysis and evaluation criteria			
	2.3 Gather tourism data that is comprehensive, accurate and valid			
	2.4 Extract and synthesise necessary information for the purpose of analysis			
	2.5 Analyse and evaluate tourism data within agreed timescales and evaluation criterion			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to analyse and evaluate tourism data	3.1	Describe the purpose for which an analysis and report is required			
		3.2	Describe the evaluation and analysis criteria procedures to follow			
		3.3	Know the timescale for work to be undertaken			
		3.4	Identify relevant information and data from small and extended documents			
		3.5	Identify relevant and reliable sources of information within the organisation			
		3.6	Identify required specialist expertise and/or information			
		3.7	Describe how to access all relevant sources of tourism data and information			
		3.8	Describe how to compare tourism data and statistics			
		3.9	Describe how to synthesise information obtained to achieve the aims of the analysis			
		3.10	Describe how to formulate conclusions and recommendations based on evidence gathered			
		3.11	Describe when and how to archive			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to present the results of tourism data analysis	4.1	Present statistical tourism data clearly which conforms to the organisation's house style			
		4.2	Produce clear, concise and factual reports of the analysis supported by valid evidence			
		4.3	Identify any obvious trends in the information gathered and subsequent analyses			
		4.4	Justify conclusions and propose realistic recommendations based on the information gathered and subsequent analysis			
		4.5	Adapt presentations of results to meet the needs and interests of the target audience			
		4.6	Forward reports from data analysis promptly to the relevant person(s) and in the required format			
5	Know how to present the results of tourism data analysis effectively	5.1	Describe how to use appropriate language to suit the required formality and nature of a presentation			
		5.2	Describe how to select an appropriate form of presentation of reports			
		5.3	Describe how to organise written material coherently			
		5.4	Describe ways to ensure presentations are accurate and error free			
		5.5	Identify the person(s) to whom reports should be forwarded			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 40: Monitor Procedures to Safely Control Work Operations

Unit reference number:	F/601/9354
Level:	3
Credit value:	5
Guided learning hours:	35

Unit summary

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

a) health and safety procedures are being followed within work areas

b) appropriate action is undertaken to control workplace hazards.

Evidence requirements

Pro Skills Assessment Strategy applies to this unit.

Evidence requirements

LEARNING OUTCOME	Be able to check that health and safety instructions are followed
	The learner will research current health and safety regulations and workplace instructions, within the limits of their job role.
	Devise or adapt existing procedure and documentation to determine areas for monitoring, records to be kept and arrangements for reporting findings.
	Learners may prepare a written plan, discussed it with the responsible people, made changes identified and subsequently conducted the monitoring.
	Evidence may be by learner produced documentation or adapted from that imposed by the organisation. Need to demonstrate they can effectively communicate with people of all levels in the organisation.
	Obtain feedback to confirm instructions are communicated and feedback received, and deal with any breaches of health and safety instructions. Recommend changes to the responsible person that effectively ensures compliance with legislation and instructions.

LEARNING OUTCOME	Be able to recommend changes to health and safety workplace instructions
	Learner will be aware of the relevant sections in the health and safety at work act that specify action to be taken against breaches.
LEARNING OUTCOME	**Be able to make sure that hazards and risks are controlled safely and effectively**
	Record and report any differences that may exist between workplace legal requirements and workplace instructions to the responsible person and recommend action to rectify.
	Report any differences that may exist between workplace legal requirements and workplace instructions to the responsible person for consideration.
	Following the monitor make records. Compile a report to be presented to responsible person. When actions are complete make arrangements for secure retention of findings to inform future monitoring activity.
	Reports to be made to the responsible person recommending remedial action.
LEARNING OUTCOME	**Know how to monitor procedures to safely control work operations**
	Ensure they know the employers' and employees' legal responsibilities for health and safety and their own as defined in their job role. Recognise the limits in the scope of their job recognising their own level of competence and which areas of the workplace they are responsible for.
	Know the particular hazards in the workplace and working practices, the subsequent risks and control strategy, and why everyone should be alert to the presence of hazards in the workplace.
	The learner needs to be able to explain that to monitor procedures in the workplace they have researched what needs to be checked, legal requirements and workplace instructions applicable and job roles. They should know what risk assessments have been carried out, the findings resulting and if they are being followed. They will compile a report with recommendations and report to the person responsible for the workplace and follow up to ensure that action has been taken and relevant information communicated as appropriate.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to check that health and safety instructions are followed	1.1	Keep up to date with health and safety regulations and workplace instructions, making sure that information is from reliable sources			
		1.2	Conduct monitoring of the workplace at agreed intervals and in accordance with workplace instructions			
		1.3	Confirm that workers are health and safety competent as defined in their job role and that identified health and safety training needs have been met			
		1.4	Communicate workplace instructions and receive feedback			
2	Be able to recommend changes to health and safety workplace instructions	2.1	Respond to any breaches of health and safety instructions in a way which meets workplace and legal requirements			
		2.2	Make recommendations for any changes to health and safety workplace instructions to the responsible people			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to make sure that hazards and risks are controlled safely and effectively	3.1	Maintain accurate records of workplace irregularities			
		3.2	Check other people are aware of the hazards/risks and know the action(s) to be taken to minimise them			
		3.3	Confirm that appropriate precautions to control risks have been agreed with the people responsible for health and safety			
		3.4	Review to make sure all recommended action has been taken			
		3.5	Report any conflicts that still exist between workplace and legal requirements			
4	Know how to monitor procedures to safely control work operations	4.1	Explain employers' and employees' legal responsibilities for health and safety in the workplace			
		4.2	Explain the difference between 'hazard', 'risk' and 'control'			
		4.3	Describe the types of information available from reports and records covering the workplace			
		4.4	Explain the importance of evaluating information from reports and records covering the workplace			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 41: Deal with Travel and Tourism Problems and Emergencies

Unit reference number:	M/601/6496
Level:	3
Credit value:	3
Guided learning hours:	24

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to respond to problems and emergency situations
What you must **DO**	The assessor may assess assessment criteria 2.1-2.10 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	– at least **two** from **emergency situation**
	
	   a **accident**
	   b **fire**
	   c **natural disaster**
	   d **death**
	   e **epidemics**
	   f **serious individual illness and or condition**
	   g **customer arrest**
	   h **violence**
	   i **lost people**
	
	– at least **two** from **problem**
	
	   a **accommodation**
	   b **lost travel documents**
	   c **non-availability of transport**
	   d **customers' property**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	**Be able to co-ordinate post emergency situations**
What you must **DO**	The assessor may assess assessment criteria 4.1-4.7 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	– at least **three** from **sources of assistance**
	
	   a **insurers**
	   b **suppliers**
	   c **colleagues**
	   d **fellow tour operators**
	   e **assistance companies or services**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the need for effective responses to problems and emergencies	1.1 Explain why prompt help and good communications with customers, colleagues and other affected parties is important			
	1.2 Describe the extent to which taking the correct action helps maintain good customer relationships and its value to the organisation			
	1.3 Explain the importance of giving on-going support to those closely affected by emergencies			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to respond to problems and emergency situations	2.1	Produce an immediate plan of action that prioritises needs and is based on an accurate assessment of the emergency situation or problem			
		2.2	Provide prompt and effective action to prevent escalation of the situation			
		2.3	Give clear and relevant instructions to others assisting with the situation			
		2.4	Call any relevant emergency services promptly			
		2.5	Alert the correct authorities to any situation beyond personal authority or control			
		2.6	Minimise any danger or distress to customers in the immediate vicinity			
		2.7	Maintain an appropriate balance between the needs of the individuals and the group as a whole			
		2.8	Ensure responses comply with organisational procedures and local requirements			
		2.9	Minimise inconvenience to customers and maintain goodwill			
		2.10	Keep accurate records of critical factors and key information where appropriate			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to respond to problems and emergencies	3.1 Outline your organisation's procedures and guidelines for handling emergency situations			
	3.2 Identify the limits of your authority and legal responsibilities for dealing with emergencies			
	3.3 Describe action that can be taken to contain and handle emergency situations and the consequences of each			
	3.4 Describe the factors that must be considered in order to arrive at the most suitable course of action and the consequences of failure to take such action			
	3.5 Explain why different approaches may have to be used when considering the local situation and organisational policy			
	3.6 Describe how to assess emergency situations			
	3.7 Identify the position of emergency exits in the location(s) where you are working			
	3.8 Identify the location of available emergency equipment and describe how to use it			
	3.9 Identify emergency contact numbers and the nature of the help available			
	3.10 Describe the role and scope of the local emergency services			
	3.11 Describe the role and scope of the main support services provided by the local authorities			
	3.12 Identify the types of records that must be completed in the event of an emergency and how to complete and submit them			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to co-ordinate post-emergency situations	4.1	Promptly and clearly notify all affected parties of the situation and its implications for them			
		4.2	Secure the support of the correct authorities and sources of assistance			
		4.3	Resolve any conflicts between local customs and the organisation's procedures			
		4.4	Ensure that all customers affected by the emergency are aware of the situation and reassured			
		4.5	Ensure that alternative arrangements are in place for customers unable to continue with their original plans			
		4.6	Ensure that sympathetic support is provided as required to those directly affected			
		4.7	Make available full and accurate records of the emergency to meet local, legal and the organisation's requirements			
5	Know how to co-ordinate post-emergency situations	5.1	Describe the role of any applicable assistance companies			
		5.2	Give examples of the types of arrangements that can be made for customers unable to continue with their plans and how to instigate these			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 42: Research and Develop Tour Itineraries

Unit reference number:	R/601/6510
Level:	3
Credit value:	8
Guided learning hours:	72

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	Be able to research market opportunities for tours
What you must **DO**	The assessor may assess assessment criteria 2.1-2.6 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	 – at least **one** from **market research techniques**
	   a desk research
	   b field-based research
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to research and develop tour outlines
What you must **DO**	The assessor may assess assessment criteria 4.1-4.9 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	
	– at least **one** from **target customer group**
	
	  a older people
	  b mixed age
	  c special interest
	
	– at least **three** from **tour outline**
	
	  a geographical area
	  b subject
	  c theme
	  d distance
	  e timescale
	  f proposed start and finish points
	  g places of interest
	  h transport
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to develop detailed tour itineraries
What you must **DO**	The assessor may assess assessment criteria 5.1-5.4 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of researching and developing tour itineraries	1.1 Explain the importance of identifying several tour options 1.2 Diagnose hazards and potential risks to different customer groups 1.3 Explain the importance of detailed itinerary planning 1.4 Explain the importance of agreeing the operating parameters of tours and the degree of responsibility and authority the guide has in managing the tour 1.5 Explain why confidentiality is important in researching and developing tours			
2 Be able to research market opportunities for tours	2.1 Conduct research so that outcomes are based on relevant market research techniques and suitable sources of market information 2.2 Examine viable gaps in the tour market for the geographical areas in which the organisation operates 2.3 Formulate tour routes that show best potential for success 2.4 Categorise target customer group(s) for tours and the means of reaching them 2.5 Describe the tour and customer profiles with the greatest market potential 2.6 Appraise any risks associated with promoting and selling proposed tours and measures suggested to manage such risks			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Know how to research market opportunities for tours	3.1	Identify suitable sources of market information and how to access them			
		3.2	Explain how to use and apply effective market research techniques			
		3.3	Compare the key characteristics of different customer groups and the general requirements of each when on tour			
		3.4	Develop the general criteria for assessing the success of tours			
		3.5	Explain how to assess the market potential of a tour			
		3.6	Identify the potential risks associated with marketing and selling tours and how to minimise these risks			
		3.7	Describe the type and depth of information necessary in order to make a realistic projection of customer take-up for a tour			
		3.8	Explain how to carry out and produce a cost benefit analysis linked to each potential route			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to research and develop tour outlines	4.1 Develop tour outlines so that informed decisions can be made about the likely level of uptake by the target customer group			
	4.2 Assemble the key features and components of the tour			
	4.3 Identify potential suppliers that meet the expectations of the target customer group			
	4.4 Identify the route options, hazards and potential risks for the target customer group			
	4.5 Describe the levels of co-operation and availability needed from suppliers			
	4.6 Identify any advanced booking requirements			
	4.7 Calculate cost-benefit analysis for each potential route			
	4.8 Agree a tour outline for further detailed development and identify any necessary development resources			
	4.9 Specify targets and success criteria for the proposed tour			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to develop detailed tour itineraries	5.1	Plan and specify the detail of tours			
		5.2	Present detailed tour itineraries in the required format			
		5.3	Negotiate agreements with all suppliers and parties involved in the tour that are clear comprehensive, acceptable, confirmed in writing and that maintain goodwill			
		5.4	Define the roles of suppliers, colleagues and self in the tour			
6	Know how to develop tour outlines and itineraries	6.1	Describe the roles and services that could be provided by suppliers			
		6.2	Identify how to assess the type and extent of services required from suppliers when matched to the needs of the target customer group			
		6.3	Describe how to define the tour requirements			
		6.4	Describe how to identify and agree the relevant roles and responsibilities of self and suppliers			
		6.5	Describe how to define the type and quantity of resources needed to develop a detailed itinerary			
		6.6	Describe how to define and set tour objectives and criteria for success			
		6.7	Identify factors commonly affecting itinerary design and planning			
		6.8	Describe how to produce detailed tour costings			
		6.9	Describe common difficulties in itinerary planning and ways to overcome them			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	6.10	Explain how to plan for contingencies and the types of common problems that should be subject to contingency planning			
	6.11	Describe how to estimate the effects of contingencies and unexpected delays			
	6.12	Illustrate how to design flexibility into itineraries to enable suitable responses to changing circumstances during tours			
	6.13	Describe how to identify and satisfy the itinerary requirements of customers with special needs			
	6.14	Describe how to negotiate and agree contractual arrangements			
	6.15	Describe how to identify and agree any constraints on what third parties can do			
	6.16	Identify the basic current legal requirements affecting itinerary planning and agreement			
	6.17	Identify format requirements of tour itinerary agreements			
	6.18	Identify suitable channels and media through which to market tours to target customer groups			
	6.19	Describe suitable sources of information for identifying key features and components of tours and how to access them			
	6.20	Identify local regulations and customs affecting travel and tourism			
	6.21	Describe any itinerary format and presentation requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	6.22 Explain how to agree operating parameters and define extents and levels of responsibility and authority, in tour planning			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 43: Plan and Deliver On-Site Entertainment

Unit reference number:	K/601/6609
Level:	3
Credit value:	5
Guided learning hours:	42

Unit summary

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

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

Evidence requirements

LEARNING OUTCOME	**Be able to plan entertainment**
What you must **DO**	The assessor may assess assessment criteria 2.1-2.9 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the candidate's work for:
	
	– **both** from **needs and expectations**
	   a **the intended audience**
	   b **the organisation**
	
	– at least **two** from **venue requirements**
	   a **location and access**
	   b **type of venue**
	   c **venue facilities**
	   d **capacity of venue**
	   e **customer facilities**
	   f **health and safety**
	   g **cost**
	
	– at least **two** from **resources**
	   a **equipment and material**
	   b **people**
	   c **publicity materials and channels**
	
	– at least **two** from **success criteria**
	   a **attendance figures**
	   b **timing**
	   c **effectiveness of content and delivery**
	   d **suitability of venue**
	   e **level of customer satisfaction**
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	**Be able to deliver and evaluate entertainment**
What you must **DO**	The assessor should assess assessment criteria 4.1-4.8 by directly observing the candidate's work. The assessor may assess assessment criterion 4.9 through witness testimony, or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles for the planning and delivery of on-site entertainment	1.1	Diagnose the critical factors to consider when selecting and structuring the content of events to meet customers' requirements			
		1.2	Express the importance of leaving your customers with a positive impression at the close of events			
		1.3	Illustrate the importance of making an evaluation of own performance and using this to inform changes to future events			
		1.4	Explain the importance of establishing good working relationships with local supplier contacts			
		1.5	Explain the importance of allowing sufficient time for practice and rehearsal			
		1.6	Explain the importance of encouraging audience participation			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to plan entertainment	2.1 Identify the needs and expectations for entertainment activities			
	2.2 Check the availability of potential types of entertainment and venues			
	2.3 Identify timings likely to meet needs and expectations			
	2.4 Agree with the appropriate person(s), criteria for success of the planned entertainment and the methods by which customer feedback is to be gathered			
	2.5 Select and plan entertainment that is suited to the venue and shows greatest potential for success			
	2.6 Book venues to ensure that requirements are met			
	2.7 Ensure that all necessary resources are available and within budget			
	2.8 Brief all suppliers			
	2.9 Identify health and safety hazards or potential risks and minimise their impact			
	2.10 Secure necessary support from colleagues			
	2.11 Ensure that suitable arrangements are in place for rehearsals and evaluation			
	2.12 Identify success criteria for entertainment			
	2.13 Plan venue layout and set-up to suit the entertainment and ensure safety			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to plan on-site entertainment	3.1 Describe how to set suitable, measurable criteria for the success of different events			
	3.2 Explain how to select and assess venues for entertainment events, including health and safety requirements			
	3.3 Identify the types and quantities of resources needed for entertainment events			
	3.4 Identify where and how to source materials and equipment			
	3.5 Explain when and how to use music to create and change atmosphere and mood at an entertainment event			
	3.6 Describe how to set suitable, measurable criteria for the success of different events			
	3.7 Describe how to structure content to make an event lively and entertaining			
	3.8 Describe how to estimate venue set-up and preparation times			
	3.9 Explain how different types of entertainment link to different customer groups			
	3.10 Summarise the critical aspects of current health and safety legislation relevant to delivering the entertainment events			
	3.11 Summarise local regulations affecting the planning and delivery of entertainment events			
	3.12 Summarise the organisational requirements, standards and procedures relating to the provision of on-site entertainment by staff			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.13 Describe types of venues available and their suitability for different events			
	3.14 Explain how venue set-up and layouts can affect the effectiveness of entertainment			
	3.15 Explain how to enlist the support of colleagues to participate in events			
	3.16 Identify the person(s) with whom resources should be agreed			
	3.17 Explain how to identify the profile of your likely customers and their needs and expectations			
	3.18 Explain how and where to publicise entertainment events in order to gain maximum impact and response			
	3.19 Analyse the types of entertainment possible at the resort and how these link to different customer groups			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to deliver and evaluate entertainment	4.1	Ensure that the layout and set-up of the venue is safe and suited to the entertainment			
		4.2	Ensure that customers are welcomed to the event			
		4.3	Ensure that customers are comfortable and have a clear view prior to the entertainment starting			
		4.4	Ensure the entertainment is delivered according to plan			
		4.5	Make any necessary impromptu changes to the event in response to audience reaction			
		4.6	Enhance audience enjoyment of the event through delivery style, music, pace, timing and audience participation			
		4.7	Capture and retain the attention of the audience throughout the event			
		4.8	Ensure that the event leaves a positive impression of the entertainment and of the organisation			
		4.9	Capture and evaluate reliable customer feedback on the event to inform plans for future events			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know how to deliver and evaluate entertainment	5.1 Describe how to meet and greet customers 5.2 Explain the importance of starting and ending entertainment events on time 5.3 Describe how to pace and time verbal material to achieve the maximum audience impact and entertainment value 5.4 Describe how to gauge audience reaction and respond accordingly 5.5 Describe procedures for noting and forwarding immediate customer feedback			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____
(*if sampled*)

Unit 44: Manage Accommodation and Transfers

Unit reference number:	L/601/5789
Level:	3
Credit value:	3
Guided learning hours:	25

Unit summary

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

The unit is designed for use primarily by resort managers and supervisors and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to manage transfers of customers from and to arrival and departure points
What you must **DO**	The assessor should assess assessment criteria 2.1 – 2.10 by directly observing the learner's work.
	The assessor may assess support assessment of criterion not observed through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **three** from **customers**
	a **adults**
	b **children**
	c **elderly**
	d **individuals**
	e **families**
	f **groups**
	– at least **one** from **customer emergencies**
	a **medical**
	b **repatriation**
	– at least **one** from **customer problems**
	a **lost luggage**
	b **lost passport**
	c **lost tickets**
	– at least **one** from **customer requirements**
	a **mobility**
	b **access**
	– at least **one** from **travel terminal**
	a **air**
	b **sea**
	c **coach**
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.
LEARNING OUTCOME	**Be able to ensure that standards of customer accommodation are maintained**
What you must **DO**	The assessor may assess assessment criteria 3.1-3.6 through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must **COVER**	There must be performance evidence, gathered through observing the learner's work for:
	– at least **one** from **accommodation**
	a **hotel**
	b **self-catering**
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of managing accommodation and transfers	1.1	Explain the importance of maintaining customer confidence and goodwill			
		1.2	Explain the key issues of supervising local (non-head office) staff			
2	Be able to manage transfers of customers from and to arrival and departure points	2.1	Ensure that manifests and arrival and departure lists are available and correct			
		2.2	Book adequate and suitable transport in advance			
		2.3	Ensure that booked transport is present and available when it is needed			
		2.4	Ensure that adequate numbers of staff are planned in advance and available to meet to customer			
		2.5	Respond to any referred customer emergencies, problems and requirements promptly and in accordance with company policies			
		2.6	Report any situation which cannot be resolved locally to head office			
		2.7	Liaise and communicate with handling agents to maintain good working relationships whilst achieving required levels of service			
		2.8	Ensure that travel terminal procedures and security requirements are complied with			
		2.9	Accurately record reported non-compliance of the agreed standards of transfer service			
		2.10	Identify non-compliance of the agreed standards of transfer service to the suppliers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to ensure that standards of customer accommodation are maintained	3.1	Ensure that checks on accommodation standards are carried out at the required frequency			
		3.2	Ensure that accommodation standards are judged against agreed current standards			
		3.3	Accurately record non-compliance of the agreed standards of accommodation			
		3.4	Identify non-compliance of the agreed standards of accommodation to the suppliers			
		3.5	Ensure that, where necessary, re-inspection of accommodation is carried out on time and against agreed standards			
		3.6	Ensure that, where necessary, non-compliance with standards are reported to the appropriate person(s)			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Know how to manage accommodation and transfers	4.1	Explain transport terminal procedures			
		4.2	Describe suitable means of managing different types of customers			
		4.3	Describe how to communicate clearly, by voice and gesture, with groups of customers on vehicles and at travel termini			
		4.4	Explain how to deal with delayed or otherwise dissatisfied customers who are referred to you			
		4.5	Describe the problems that can arise in transfers and accommodation and suitable means of resolving them			
		4.6	Describe how to communicate effectively with local staff, handling agents (including local), transfer and accommodation providers and service providers			
		4.7	Explain company procedures for transfers and inspection of accommodation			
		4.8	Describe the working arrangements between carrier, handling agent and your company			
		4.9	Outline expected standards of service of transfers and accommodation			
		4.10	Describe procedures for referring emergencies and problems to head office			
		4.11	Describe means of dealing with shortfall in standards of transfers and accommodation			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Unit 45: Manage Delivery of a Tour

Unit reference number:	T/601/6516
Level:	3
Credit value:	4
Guided learning hours:	35

Unit summary

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

The unit is designed for use primarily by tour managers (rather than tour guides) and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Evidence requirements

LEARNING OUTCOME	Be able to ensure the delivery of tour itineraries
What you must **DO**	The assessor must assess assessment criteria 2.1-2.6 by directly observing the candidate's work.

What you must **COVER**	There must be performance evidence, gathered through observing the candidate's work for:
	   – at least **three** from **programme**
	     a route
	     b breaks
	     c visits
	     d timings
	     e accommodation
	     f refreshments
	   – at least **three** from **information**
	     a tour programme
	     b local practical
	     c local customs
	     d local environment
	     e basic local history
	     f basic local socio-economic
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to care for customers on a tour
What you must DO	The assessor must assess assessment criteria 3.1-3.8 by directly observing the candidate's work. The assessor may assess assessment criterion 3.9 through questioning, witness testimony or other documentary evidence demonstrating competence.

What you must COVER	There must be performance evidence, gathered through observing the candidate's work for:
	
	– at least **one** from **local expectations**
	  a cultural
	  b social
	  c environmental
	– at least **two** from **problems**
	  a vehicle difficulties
	  b minor accidents
	  c illness
	  d customers fail to follow the leaders instructions
	  e customers conflict with one another
	  f customer safety or security is compromised
	
	Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

LEARNING OUTCOME	Be able to carry out tour administration
What you must DO	The assessor may assess assessment criteria 4.1-4.5 through questioning, witness testimony or other documentary evidence demonstrating competence.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the importance of managing tours effectively	1.1 Explain the importance of maintaining good customer relations and goodwill			
	1.2 Explain the importance of good time management when leading groups			
	1.3 Explain the importance of giving accurate information on route and timings, before, during and at the conclusion of the tour			
	1.4 Explain why it is important to brief customers fully on safety, welfare and local issues			
	1.5 Explain the importance of respecting local customs, environmental, cultural and regulatory requirements in a tour area			
	1.6 Explain factors affecting group behaviour			
	1.7 Explain how age, customer mix and the size of group can affect the conduct of the tour			
	1.8 Explain the importance of maintaining regular contact with colleagues			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to ensure the delivery of tour itineraries	2.1 Comply with the programme and timing agreed between the organiser and suppliers			
	2.2 Deliver services to the standards and quality agreed by the organiser			
	2.3 Give customers relevant, clear and accurate information at key points throughout the tour			
	2.4 Implement contingency arrangements as necessary in response to any problems and disruptions			
	2.5 Handle any unforeseen events to minimise disruption and reassure customers			
	2.6 Maintain the goodwill of external suppliers and customers' positive image of the organiser			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to care for customers on a tour	3.1	Maintain a welcoming, calm, available and professional approach to customers			
		3.2	Maintain customers' comfort, well-being and enjoyment			
		3.3	Create a positive impression of the organisation			
		3.4	Meet the needs and realistic expectations of customers			
		3.5	Maintain customers' awareness of any local expectations			
		3.6	Balance the needs and expectations of individuals with those of the whole group			
		3.7	Avoid identified hazards that present an unacceptable risk to group members			
		3.8	Take action in case of problems to minimise the effects and maintain goodwill			
		3.9	Deal with emergency situations promptly and calmly			
4	Be able to carry out tour administration	4.1	Complete all required tour records and customer information and keep them safe and secure			
		4.2	Ensure that customer and baggage check-in and check-out is smooth and efficient			
		4.3	Provide clear and accurate information bulletins at suitable times and places			
		4.4	Ensure that all administrative procedures comply with local, national and organisation requirements			
		4.5	Promptly report any factors likely to affect future tours clearly to relevant person(s)			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Know how to manage tour group dynamics	5.1 Describe likely causes and consequences of disruptions to the group and others			
	5.2 Identify potential risks to the health, safety and security of tour groups			
	5.3 Describe means of controlling risks to the health, safety and security of tour groups			
	5.4 Describe the relevant parts of current legislation to include Health & Safety, working with minors, equal opportunities and Disability Discrimination and their impact on conducting a tour			
	5.5 Explain the importance of assessing risks throughout a tour			
	5.6 Describe how to assess risks on an ongoing basis throughout a tour			
	5.7 Describe how to handle groups on a tour including dealing with disruptive customers			
	5.8 Describe how to ensure the smooth and effective transition of customers in and out of accommodation and other venues			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Know how to manage delivery of a tour	6.1	Describe the detailed itinerary of the tour(s) and procedures for leading it			
		6.2	Identify features of the itinerary in terms of what will be seen and what will be visited			
		6.3	Describe customs, environmental, cultural and regulatory requirements in the tour area			
		6.4	Identify the suppliers to be used and summarise their contractual arrangements			
		6.5	Identify quality standards agreed by the organiser and the way these are to be monitored and measured			
		6.6	Outline the background information you should give to customers for the tour(s) you are managing including local practical information, local customs, basic geographical features, basic historical and socio-economic aspects			
		6.7	Describe the options available and extent of your authority to deal with unforeseen events			
		6.8	Describe the health and safety advice, guidance and procedures relevant to the tour you are conducting			
		6.9	Describe the courses of action to take in the event of problems and emergencies, the local facilities available to deal with them and how to access them			
		6.10	Identify the type(s) of documentation necessary for the particular tour(s) you are managing and how to complete them			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(*if sampled*)

Further information

To get in touch with us visit our 'Contact us' pages:
- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications
- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* (Pearson)

All of these publications are available on our website: qualifications.pearson.com

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website on the Delivering BTEC pages. Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website.

Useful publications

Related information and publications include:
- *Centre Handbook for Edexcel NVQs and Competence-based Qualifications* published annually
- Functional skills publications – specifications, tutor support materials and question papers
- *Regulatory Arrangements for the Qualification and Credit Framework* (published by Ofqual, August 2008)
- the current Edexcel publications catalogue and update catalogue.

Edexcel publications concerning the Quality Assurance System and the internal and standards verification of vocationally related programmes can be found on the Pearson website.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

How to obtain National Occupational Standards

To find out how to obtain the National Occupational Standards, please go to www.ukstandards.org.uk

Professional development and training

Pearsons supports UK and international customers with training related to NVQ and BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (qualifications.pearson.com). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

Annexe A: Quality assurance

Key principles of quality assurance

- A centre delivering Pearson qualifications must be an Pearson-recognised centre and must have approval for qualifications that it is offering.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to the effective delivery and quality assurance of assessment. The centre must abide by these conditions throughout the period of delivery.
- Pearson makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Edexcel qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes; and dealing with special circumstances, appeals and malpractice.

Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Pearson. Pearson is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. The specific arrangements for working with centres will vary. Pearson seeks to ensure that the quality-assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them in providing robust quality-assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Pearson operates a quality-assurance process, designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres offering these qualifications must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Pearson.

The Pearson quality-assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Pearson qualifications
- annual visits to centres by Pearson for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by a Pearson quality development reviewer
- annual visits by occupationally competent and qualified Pearson Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Centres are required to declare their commitment to ensuring quality and appropriate opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Annexe B: Centre certification and registration

Pearson Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Pearson will maintain the integrity of Pearson NVQs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Pearson will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Pearson in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Pearson will aim to secure the appropriate expertise to provide this.

What are the access arrangements and special considerations for the qualifications in this specification?

Centres are required to recruit learners to Pearson qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Pearson's policy on access arrangements and special considerations for Pearson qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 2010 Equality Act) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational Qualifications* for further details. qualifications.pearson.com

Annexe C: Assessment principles

Hospitality, Leisure, Travel and Tourism Sector Assessment Strategy for competence based units of assessment and qualifications (in England, Wales and Northern Ireland) and Scottish Vocational Qualifications (SVQs)

1 Introduction

The sector assessment strategy applies to all competence based units and qualifications that sit within the industries represented by People 1st. Competence based units and qualifications are those that are accredited to the Qualifications and Credit Framework, for England, Wales and Northern Ireland, which include National Vocational Qualifications (NVQs). In Scotland it applies to all sector Scottish Vocational Qualifications (SVQs). The sector assessment strategy comes into force on the 1st August 2009 and will apply to any new competence based units and qualifications. It will also replace other assessment strategies, currently used for existing NVQs and SVQs, as and when they are updated and re-accredited. See www.people1st.co.uk for a list of all competence based units and qualification that are covered by the sector assessment strategy.

There are four components to the sector assessment strategy which set out requirements and guidance relating to:

- external quality control
- assessment principles
- occupational expertise of assessors and verifiers
- continuous professional development

The purpose of the sector assessment strategy is for People 1st and awarding organisations/bodies to work in partnership to:

- maximise the quality assurance arrangements for the sector's competence based units and qualifications and maintain standardisation across assessment practice
- assure employers and candidates that the sector's competence based units and qualification are consistently assessed to the National Occupational Standards, and
- promote continuous professional development amongst assessors and verifiers.

The content of the assessment strategy has been reviewed in close consultation with employers, awarding organisations/bodies, training providers and other sector stakeholders. While many of these stakeholders have an interest in the assessment strategy, its primary audience are awarding organisations/bodies that offer competence based units and qualifications in the hospitality, leisure, travel and tourism industries. Prospective or approved centres should not need to work directly with this document as its requirements will be incorporated within the procedures of their chosen awarding organisation/body.

The strategy should be used alongside the assessment and quality assurance guidance published by the regulatory authorities. Further information about competence based units and qualifications can be found at www.people1st.co.uk. Feedback or comments on the sector assessment strategy can be emailed to qualifications@people1st.co.uk.

2 External Quality Control

2.1 Risk Assessment and Management of Centres

External quality control is achieved through rigorous monitoring and standardisation of assessment decisions. Awarding organisations/bodies achieve this by operating their existing systems for quality monitoring, risk assessment and management of their approved centres, following guidance issued by the regulatory authorities.

As part of this process People 1st requires awarding organisations/bodies to:

- ensure that external verification, monitoring and support provided to centres takes into account their level of risk. For example new assessment centres, and those that are experiencing difficulty in meeting the assessment requirements, should be given additional support by their awarding organisation/body

- supply People 1st with standardised information on their statistical monitoring, including registration and certification figures, on a quarterly basis. This data will remain confidential and no individual awarding organisation's/body's data will be published

- report annually on the outcomes of, and any issues arising from, external verification and quality control arrangements

- highlight specific issues relating to the assessment of the sector's competence based units and qualifications that require immediate attention, as and when they arise

- contribute to the awarding organisations'/bodies' forums to review and discuss matters relating to the assessment of the sector's competence based units and qualifications. The forum will meet at least biannually, or during key stages of projects and reviews

- resolve issues relating to the assessment and verification of the sector's competence based units and qualifications with the action(s), and in the timeframe, agreed.

3 Assessment

People 1st advocate the integration of National Occupational Standards within employers' organisations in order to achieve a national level of competence across the sector's labour market.

As such, assessment of the sector's competence based units and qualifications will, ideally, take place within the workplace and assessment should, where possible, be conducted by the candidate's supervisors and/or line managers. People 1st recognise, however, that it is not always feasible for candidates to be assessed in the workplace and

as such it permits the use of assessment within Realistic Working Environments (RWE). Additionally, where sector employers do not have the infrastructure to manage assessment independently, it values the role of peripatetic assessors to support the assessment process.

Within these parameters, People 1st expects that:

- the majority of assessment of the sector's competence based units and qualifications will be based on performance evidence, ie direct observation, outputs of work and witness testimony within the workplace or an RWE approved by an awarding organisation/body, (see section 3.4).

- opportunities to ascertain candidate's accreditation of prior learning is maximised by early contact between the assessor and candidate and during initial assessment/induction period.

  Please note: External tests do not form part of People 1st's assessment strategy, other than linkage to IATA approved tests in Unit TT27, Sell Multi-Sector Air Travel, part of the Travel S/NVQ (where it may be a specific requirement and therefore applicable in that instance).

3.1 Witness Testimony

People 1st recognise the use of witness testimony and expert witness testimony as appropriate methods for assessors to collect evidence on candidates' performance.

Witness testimonies can be obtained from people that are occupationally competent and whom may be familiar with the National Occupational Standards, such as the candidate's line manager.

They may also be obtained from people who are not occupationally competent, and do not have a knowledge of the National Occupational Standards, such as other people within the candidate's workplace, customers and suppliers. The assessor must judge the validity of the witness testimony and these may vary depending on the source. Witness testimonies can only support the assessment process and may remove or reduce the need to collect supplementary evidence, however, the awarding organisation's/body's minimum observations requirements must be met.

Expert witnesses may be used where additional support relating to the assessment of technical competence is required. Expert witnesses may be:

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

- line managers, other managers or experienced colleagues that are not approved assessors, but whom the awarding organisation/body agrees has current occupational competence, knowledge and expertise to make a judgement on a candidate's competence.

Expert witnesses must be able to demonstrate through relevant qualifications, practical experience and knowledge that they are qualified to provide an expert opinion on a candidate's performance in relation to the unit being assessed. People 1st believe that it is unlikely for an expert witness to be fully expert within any of the sector's occupational areas in less than twelve months to two years.

The final judgement on the validity of the expert witness testimony rests with the assessor and such testimonies may only be used in line with awarding organisation's/body's requirements.

3.2 Professional Discussion

Professional discussion is encouraged as a supplementary form of evidence to confirm a candidate's competence. Such discussions should not be based on a prescribed list of questions but be a structured discussion which enables the assessor to gather relevant evidence to ensure the candidate has a firm understanding of the standard being assessed.

3.3 Simulation

Simulation can only be used to assess candidates for the sector's competence based units and qualifications where the opportunity to assess naturally occurring evidence is unlikely or not possible, for example assessment relating to health and safety, fire and emergency procedures. It should not include routine activities that must be covered by performance evidence.

There are no People 1st units that can be solely achieved by simulation. In the case of imported units, where simulation is acceptable in the evidence requirements, it should only be used when performance evidence is unlikely to be generated through normal working practices.

See *Annex A* for competence based units which permit the use of simulation.

Awarding organisations/bodies must issue adequate guidance which informs centres how simulation should be planned and organised, ensuring that demands on candidates are neither more nor less than they would encounter in a real work situation. In particular:

- a centre's overall strategy for simulation must be examined and approved by the external verifier
- all simulations must be planned, developed and documented by the centre in a way that ensures the simulation correctly reflects what the unit seeks to assess
- ideally, there should be a range of simulations to cover the same aspect of the standard
- the physical environment for the simulation, and the nature of the contingency, must be realistic
- candidates should carry out the simulation in a professional manner
- the candidate should be given no indication as to what the simulation will present.

3.4 Realistic Working Environment

Assessment of the sector's competence based units and qualifications should ideally be carried out within the workplace, however, where this is not possible candidates can be assessed within an approved Realistic Working Environment (RWE) that replicates a real work setting. The criteria for RWE currently operated in the sector can be found at *Annex B.*

4 Occupational expertise of assessors and verifiers

The requirements relating to the occupational expertise of assessors and verifiers is set out in *Annex C*. Guidance on additional qualifications and/or training relevant to assessors and verifiers can be found in *Annex D.*

4.1 Using employers' in-house training programmes to assess competence based units and qualifications (please note this section is not applicable for centres which are either colleges or training providers)

a People 1st recognises that employers within the Sector provide robust in-house training, development and assessment programmes which meet the standards for Assessors and Verifiers.

Where an employer maps its in-house training, development and assessment programme to the Assessor and Verifier standards and has this approved by their awarding organisation/body, People 1st fully supports the removal of the need to achieve the Assessor and Verifier Units. The individual assessing and verifying the qualifications must still meet the other mandatory requirements for occupational competence as specified in *Annex C.*

b It should also be noted that People 1st encourages employers and awarding organisations/bodies to examine in-house employer training, development and assessment programmes to see whether these provide robust evidence against the relevant competence based units and/or qualifications (England, Wales and Northern Ireland) or the SVQs (Scotland). Where a direct mapping of the in-house training, development and assessment programme can be made to the:

• relevant Units (based on the National Occupational Standards), and assessment meets the requirements of the assessment strategy and awarding organisation/body evidence requirement, then awarding organisations/bodies should recognise this training for the purposes of achievement of the specified qualification or Unit.

In both instances specified in (a) and (b) above the awarding organisation/body will be required to ensure that a copy of the mapping is available to the Qualification Regulators.

5 Continuous Professional Development

To maintain high standards of quality and standardisation within assessment, and achieve best practice People 1st require all external verifiers, internal verifiers and assessors to maintain a record of their continuous professional development – see guidance at *Annex E.*

Annex A

Competence based units in Hospitality, Leisure, Travel and Tourism that permits simulation

Unit Number, Unit Title and Competence based qualifications that the
unit is used in

1GEN1 Maintain a safe, hygienic and secure working environment

Level 1 & 2 NVQ/SVQ Hospitality and Catering

HSL4 Maintain the health, hygiene, safety and security of the working environment

Level 3 Diploma in Hospitality Supervision and Leadership Skills
(NVQ) and Level 3 SVQ in Hospitality Supervision and Leadership

GS3009 Maintain the health, hygiene, safety and security of the working environment (adapted from HS4)

Level 3 NVQ Gambling Operations

People 1st have a special dispensation for the imported Customer Service units listed below to be assessed in a Realistic Working Environment (RWE) conforming to People 1st's criteria specified in *Annex B* of this Assessment Strategy. This would only apply to these Units when delivered as part of the L3 Diploma in Hospitality Supervision and Leadership (NVQ) and L3 Hospitality Supervision and Leadership SVQ.

ICS Unit 26 Improve the customer relationship

Level 3 Diploma in Hospitality Supervision and Leadership Skills(NVQ) and Level 3 SVQ in Hospitality Supervision and Leadership

ICS Unit 32 Monitor and solve customer service problems

Level 3 Diploma in Hospitality Supervision and Leadership Skills (NVQ) and Level 3 SVQ in Hospitality Supervision and Leadership

ICS Unit 42 Lead a team to improve customer service

Level 3 Diploma in Hospitality Supervision and Leadership Skills (NVQ) and Level 3 SVQ in Hospitality Supervision and Leadership

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

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

• there is a high risk to the security or safety of the candidate, individuals, key people in their lives and others

- the opportunity to present evidence from work-based practice happens infrequently and therefore insisting that candidates wait for such an occurrence would be unreasonable or create blockages in the assessment system and might carry the risk of de-motivating candidates
- there would otherwise be a breach of confidentiality or privacy.

The following two units are the only accepted Realistic Working Environments, and no other Realistic Working Environments will be accepted.

TT09 Assist with travel and tourism problems and emergencies

Level 2 NVQ/SVQ in Travel Services and Level 2 NVQ/SVQ in Tourism Services

TT37 Deal with travel and tourism problems and emergencies

Level 3 NVQ/SVQ in Travel Services and Level 3 NVQ/SVQ in Tourism Services

Annex B Criteria for Realistic Working Environments

It is essential for organisations operating a Realistic Working Environment (RWE) to ensure it reflects current and real work settings. By doing so, sector employers can be confident that competence achieved in an RWE will be continued into employment. RWEs can offer many opportunities to employers and individuals that have limited access to assessment.

The number of hours candidates work and their input is not prescribed, as it is acknowledged that RWEs cannot operate without some flexibility. However, centres must provide evidence that the following criteria are being met as well as fulfilling the awarding organisation's/body's criteria for this purpose. E.V.s are expected to ensure RWEs meet the criteria set out below on at least one visit.

Hospitality

1 The work situation being represented is relevant to the competence based units and qualifications being assessed
   - The type of work situation being represented mirrors the relevant setting eg quick service takeaway, restaurant, brasserie, café/snack bar, cafeteria, housekeeping department, front office, reception or reservations.
   - Appropriate industrial equipment, furnishings and resources (eg ingredients and technology) that replicate the work situation are used, ensuring that assessment requirements can be covered.
   - Industry trends are considered in the product and service offer.
2 The candidate's work activities reflect those found in the situation being represented
   - Candidates operate in a professional capacity with corresponding job schedules and/or descriptions.
   - Candidates are clear on their work activities and responsibilities.
3 The RWE is operated in the same manner to as a real work situation
   - Customers are not prompted to behave in a particular manner.
   - Customer feedback is maintained and acted upon.
4 The RWE is underpinned by commercial principles and responsibilities.
   - Organisational charts indicate the anticipated job roles in the RWE and their hierarchical structure taking into account supervisory requirements.
   - There is evidence of business planning, for example product/service plans, staffing/rotas, costing, promotions.
   - Candidates are encouraged to carry out their function in line with business expectations, eg within timescales and budget, minimising wastage.
   - Legislative regulations are adhered to eg food safety, health and safety, equal opportunities, trade description.
   - Consumer information is provided on products and services eg allergy advice on food products.

Gambling

1 The work situation being represented is relevant to the competence based units and qualifications being assessed
- The type of work situation being represented mirrors the relevant setting eg betting shop, bingo hall, casino.
- Appropriate industrial equipment, furnishings and resources that replicate the work situation are used, ensuring that assessment requirements can be covered.
- Industry trends are considered in the work situation represented.

2 The candidate's work activities reflect those found in the situation being represented
- Candidates operate in a professional capacity with corresponding job schedules and/or descriptions.
- Candidates are clear on their work activities and responsibilities.

3 The RWE is operated in the same manner to as a real work situation
- Customers are not prompted to behave in a particular manner.
- Customer feedback is maintained and acted upon.

4 The RWE is underpinned by commercial principles and responsibilities.
- Organisational charts indicate the anticipated job roles in the RWE and their hierarchical structure taking into account supervisory requirements.
- There is evidence of business planning, for example product/service plans, staffing/rotas, costing, promotions.
- Candidates are encouraged to carry out their function in line with business expectations, eg within timescales and budget, minimising wastage.
- Legislative regulations are adhered to eg health and safety, equal opportunities, trade description.

Annex C Occupational Expertise of Assessors and Verifiers

The requirements set out below relates to all assessors and verifiers. The only exception may relate to in-house employees and managers that are not required to achieve the regulatory approved assessor and verified units based on the arrangement referred to in section 4.1 of this assessment strategy.

✓ = mandatory

Assessors, Internal Verifiers and External Verifiers must:	A	IV	EV
Have a good knowledge and understanding of the national occupational standard and competence based units and qualifications that is being assessed or verified.	✓	✓	✓
Hold or be working towards relevant assessment and/or verification qualification(s) as specified by the appropriate authority, confirming their competence to assess or externally verify competence based units and qualifications assessment. These should be achieved within eighteen months of commencing their role. These are as follows:			
D35 or V2			✓
D34 or V1 — In the case that the IV is working towards their V1 unit, a representative sample of verification decisions, as agreed with the awarding organisation, must be counter-signed by a colleague who has achieved either the D34 or V1 unit. This colleague must have the same occupational expertise.		✓	
D32/D33 or A1/A2 — In the case that the assessor is working towards the A1/A2 units, a representative sample of assessment decisions, as agreed with the awarding organisation, must be counter-signed by a colleague who has achieved either the D32/D33 or A1/A2 units. This colleague must have the same occupational expertise.	✓		
Have relevant occupational expertise and knowledge, at the appropriate level of the occupational area(s) they are assessing and verifying, which has been gained through 'hands on' experience in the industry.	✓	✓	✓

Assessors, Internal Verifiers and External Verifiers must:	A	IV	EV
Adhere to the awarding organisation's assessment requirements and practice standardised assessment principles	✓	✓	✓
Have sufficient resources to carry out the role of assessor or verifier, ie time and budget	✓	✓	
Have supervisory/management, interpersonal and investigative skills, including the ability to analyse information, hold meetings, guide, advise, plan and make recommendations at all levels, taking into account the nature and size of the organisation in which assessment is taking place. High standards of administration and record keeping are also essential.		✓	✓
Hold qualifications, or have undertaken training, that has legislative relevance to the competence based units and qualifications being assessed (See Annex D).	✓	Good practice	Good Practice
Update their occupational expertise and industry knowledge in the areas being assessed and verified through planned Continuous Professional Development (see Annex E).	✓	✓	✓

Annex D Qualifications and Training relevant to Assessors and Verifiers

The following sets out areas in which assessors, verifiers and external verifiers should either received training or achieve qualifications. People 1st is **not** stipulating that assessors, verifiers or external verifiers must achieve specific qualifications, there is the option to either undertake appropriate training or an accredited qualification.

3 **= mandatory**

Qualification/Training	Competence based unit/qualification	A	IV	EV
Heath and Safety	All sector units and qualifications	✓	Good Practice	Good Practice
Food Safety	Food Processing and Cooking	✓	Good Practice	Good Practice
	Multi-Skilled Hospitality Services	✓		
	Professional Cookery	✓		
	Food and Drink Service	✓		
	Hospitality Supervision and Leadership *(with food and drink units)*	✓		
Licensing	Food and Drink Service	✓	Good Practice	
	Hospitality Supervision *(with food and drink units)*			

Annex E Continuous Professional Development for Assessors and Verifiers

It is necessary for assessors and verifiers to maintain a record of evidence of their continuous professional development (CPD). This is necessary to maintain currency of skills and understanding of the occupational area(s) being assessed, and can be achieved in a variety of ways. It should be a

planned process, reviewed on an annual basis, for example as part of an individual's performance review. Assessors and verifiers should select CPD methods that are appropriate to meeting their development needs. The following provides an example of a variety of methods that can be utilised

for CPD purposes.

Updating occupational expertise	• Internal and external work placements • Work experience and shadowing (eg within associated departments) • External visits to other organisations • Updated and new training and qualifications (www.uksp.co.uk) • Training sessions to update skills • Visits to educational establishments • Trade fairs
Keeping up to date with sector developments and new legislation	• Relevant sector websites • Membership of professional bodies • Papers and documents on legislative change • Networking events • Seminars, conferences, workshops, membership of committees/working parties (eg People 1st events) • Staff development days
Standardising and best practice in assessment	• Regular standardisation meetings with colleagues • Sharing best practice through internal meetings, news letters, email circulars • Comparison of assessment and verification in other sectors • Attending awarding organisation meetings/seminars

Downloadable guidance on CPD can be found at www.ifl.ac.uk

Annexe E: Additional requirement for qualifications that use the term 'NVQ' in a qualification title

Please go to www.ofqual.gov.uk to access the document '*Operating rules for using the term 'NVQ' in a qualification title'*.