



Unit 4: Customer Service in Travel and Tourism

Delivery guidance

Approaching the unit

This mandatory unit gives learners the opportunity to explore the importance and benefits of managing the customer experience.

Your learners will practise their customer service skills and evaluate their effectiveness to develop skills at an operative level. Effective management of the customer experience is becoming increasingly important to organisational success. The knowledge and understanding gained in studying this unit will be invaluable to your learners when seeking employment within the industry.

There is potential to develop links with local organisations to facilitate visits or guest speakers who could enhance the delivery of the unit and broaden its appeal to your learners.

You should approach this unit with passion and energy to encourage your learners to adopt a similar approach and attitude. Successful travel and tourism organisations recruit people who are passionate about customer service. Use this unit as an opportunity to inspire your learners to aspire to work for these organisations.

Use your own personal experiences of good and bad customer service and encourage your learners to do the same to bring the unit alive. You should use industry examples and case studies to support the significance of managing customer expectations effectively.

Some of your learners may feel self-conscious about participating in role-play situations and so you should have a flexible approach to this section of the unit. Include practical activities that allow your learners to develop skills at a pace that supports development of their confidence and ability.

You should explore opportunities with local travel and tourism businesses to facilitate visits and guest speakers. Many local tourist boards are happy to deliver short training sessions or presentations about aspects of customer service. You could develop these links to explore the possibility of involving staff from these organisations in the assessment of customer service role plays.

Delivering the learning aims

Learning aim A

Learning aim A introduces learners to the key factors that influence customer decisions and explores the impact of customer service on organisational success. This learning aim forms the foundation of the unit and allows your learners to explore the customer journey within travel and tourism organisations. It is important that your learners understand how organisational values impact on both internal and external customers. A focus on specific organisations such as Virgin Atlantic and Ryanair works well to support this learning aim by giving alternative approaches to customer service. Videos and articles are available via YouTube. You could devise case studies around these videos to support learning and maximise learner engagement. Learners should have access to the internet so that they can explore company websites and identify key characteristics linked to the unit content. Independent research should be encouraged. Use worksheets to give structure for less able learners in the initial stages to develop research techniques and study skills. Exceeding customer expectations is a key factor in gaining competitive advantage and differentiation. Allocate time to explore ways of exceeding customer expectations at little or no cost to organisation. You must familiarise yourself with current statutes regulations within your own country at the time of teaching. Your learners should have an understanding of the implications of these on the organisation. Case studies could be used to develop understanding for the learners.

Learning aim B

Learning aim B has a practical emphasis where learners are required to demonstrate customer service skills, knowledge and understanding in customer service situations. Consider time allocated for internal assessment when planning delivery of the unit, as this can take up learning hours. Consider combining this assessment with other units if possible (for example, *Unit 12: Investigating Overseas Working* and *Unit 13: Work Experience in Travel and Tourism*). Use peer assessment, tutor feedback and videos to develop learner skills in the formative assessment stage. Consider inviting individuals from industry to assist with assessment at the summative stage. You could also use real situations linked to a work placement with a record of activity completed by a professional in the workplace. It is essential that workplace evidence fully meets the assessment requirements for complex and challenging situations and the associated assessment guidance. You must ensure learners understand what skills they need before they demonstrate them. Input from you with video clips of their performance can work well along with knowledge of others' experiences. You should encourage your learners to include innovative ways of dealing with customers in different situations, while being mindful of the limits of their own role and authority. Learners must also be aware of professional standards required to complete documentation.

Learning aim C

Learning aim C requires self-assessment and review. You must ensure that learners have the skills necessary to be able to carry this out effectively before setting the summative assessment. Some learners may find it difficult to receive feedback. Use activities throughout delivery to build confidence and encourage self-evaluation. You must make sure that learners can formulate goals that are specific, measurable, achievable, realistic and timed, and that they formulate an action plan to determine how they could contribute to the potential success of an organisation.

Learning aim D

Learning aim D investigates the ongoing methods of monitoring, analysing and improving the customer service experience and the role of technology in the customer experience. Your learners will need access to the internet so they can explore company websites, review customer feedback and make comparisons as to how effectively organisations communicate with customers. You should give your learners customer service charters and direct them to specific company websites to explore core values and mission statements. Your learners need to use this information to present a plan to recommend and justify how an organisation can improve customer service and increase customer loyalty.



Assessment model

Learning aim	Key content areas	Recommended assessment approach
A Explore how effective customer service contributes to organisational success	A1 Customer service in travel and tourism A2 Customer communication, expectations and satisfaction A3 Impact of customer service on the organisation	A report or presentation that evaluates the significance of excellent, compliant customer service provision, factors influencing customer decisions and the importance of managing customer expectations in a selected travel and tourism organisation.
B Demonstrate customer service in different travel and tourism situations	B1 Customer service skills and behaviours B2 Dealing effectively with customer service requests and complaints	Demonstration of customer service skills in two different travel and tourism situations: • one face-to-face situation • one telephone situation. A written response to one of the customer scenarios, such as a formal letter, website or social media post, supported by professional documentation that demonstrates a knowledge of compliance with customer service regulations or policy.
C Review effectiveness of own performance in customer service to add value to travel and tourism organisations	C1 Evaluate individual performance C2 Adding value	Self-evaluation of customer service skills and an action plan to develop customer service skills further. The plan will explain how the development of skills will add value to travel and tourism organisations.
D Plan to monitor and improve customer service to achieve organisational objectives	D1 How organisations research, monitor and analyse customer service D2 The role of technology in the customer experience D3 How organisations improve the customer experience D4 Creating a customer-focused organisation and implementing service standards to achieve organisational objectives	A written plan that makes recommendations about how a selected travel and tourism organisation researches and monitors customer service and improves the customer experience. The plan will include references to how to ensure customer loyalty and achieve the organisation's objectives.

Assessment guidance

The recommended assessment of this unit is through a maximum of three internally assessed assignments. Assignments are holistic for this qualification, so tasks should not prescribe pass, merit or distinction criteria, but allow learners to achieve all the criteria by completing the task in full.

You must be confident that your learners are ready to complete assessment independently. They must fully understand the assessment requirements, the evidence they are required to produce and the importance of managing their time to meet the set deadlines.

Learners will select a named travel and tourism organisation for learning aims A and D. The same organisation can be used for both assessments if preferred. Assessors should ensure the organisations selected will offer scope for meeting all targeted assessment and grading criteria.

The assessment for learning aim A lends itself well to writing a report or giving a presentation on customer service in a selected organisation and how it contributes to organisational success.

Learning aims B and C will be addressed by the second assignment. The assessment for learning aim B may take the form of two role-play situations, or it could be assessed in a real working environment, which could be a work experience placement. The assessment should consist of two scenarios: one face to face and one on the phone. One scenario must involve a challenging customer service situation and the other must involve a complex customer service situation. Additionally, one of these will require a written response and the completion of documentation to a professional standard. You will need to allow time to assess this within the Guided Learning Hours (GLH). This assessment should be videoed where possible with a record of activity completed by the tutor or professional witnessing the situation for each individual learner. This will also give evidence necessary to complete the assessment for learning aim C.

The assessment for learning aim C develops from learning aim B and takes the form of a review. This will be an evaluation of the learner's performance in the role plays with the completion of an action plan. This must include an explanation as to how the development of the learner's skills will add value to travel and tourism organisation and contribute to its business success.

The assessment for learning aim D lends itself to writing a report or giving a presentation to review customer service methods and technology used by an organisation. Learners will include a plan with recommendations for how a selected organisation could develop its monitoring methods and use data to improve customer service in line with its organisational objectives.



Getting started

This gives you a starting place for one way of delivering the unit, based around the recommended assessment approach in the unit.

Pearson suggest using local and national examples of travel and tourism businesses, airlines, websites and videos when delivering this unit.

Unit 4: Customer Service in Travel and Tourism

Introduction

This unit gives the opportunity to enthuse learners about the prospect of working in a customer service-focused travel and tourism environment. You should give examples of great companies that recruit and reward great people. You could use Virgin as an example of an organisation that believes its employees are the most important people to the business. Use examples where possible of organisations that value staff and that are known for quality products and excellent customer service. Compare these with organisations that are price driven and do not have the same reputation for service.

Encourage learners to think about the world of work and the things they consider to be important. What is important to them? Money is important, but how important is it to be happy in your job. Talk about how being happy in your job and valued by the company you work for can impact on external customers. Discuss the staff benefits of working for an organisation that values customers.

Explore company websites and investigate their employee benefits, then discuss how these can affect employees' attitudes towards work and delivering excellent customer service. The Resources at the end of this document give examples for Virgin.

Learning aim A: Explore how effective customer service contributes to organisational success

- For content area A1, you should aim to establish the learner's experience and knowledge of customer service. This could be their experience as a customer and/or in a part-time job. Introduce the terms 'internal' and 'external' customers and discuss the importance and impact of looking after employees. Virgin is a good example to use as an organisation that values employees (refer to the Resources for a video link). Make comparisons between price-driven and service-driven organisations such as Virgin Atlantic and Ryanair.
- Learners could produce posters on the importance of first impressions in different customer service situations.
- Ask learners to consider how different factors influence customer decisions about whether or not to make a purchase or use a service or provider.
- Use customer service charters to introduce the key principles of customer service within organisations and goals of customer focused organisations (refer to the Resources at the end of this document).
- Use video clips on You Tube to demonstrate how organisations can make their customers feel important (refer to reference list for a video links).
- You could introduce content area A2 by learners researching different brands and identifying different types of customers.
- You could develop activities to explore different types of disability, investigate legislation that promotes equality and look at how different types of organisations engage with people with disabilities.
- You could devise worksheets or case studies to explore how organisations communicate with customers and understand specific needs to meet and exceed customer expectations. Use company websites (refer to the Resources at the end of this document).
- You could introduce a session by displaying negative body language as you deliver information. Continue this for the first ten minutes of the session. Note learners' reactions and follow this up with a discussion about how it made them feel. Use the Thomson training video clip to demonstrate the importance of body language in communicating with customers (refer to the Resource list).

- You could review complaints policies and consumer legislation. Learners will benefit from using realistic scenarios for dealing with complaints within organisational policies. This will help to prepare them for the practical activities in learning aim B.
- For content area A3, you could use extracts from social media and review websites as a basis to explore the positive and negative impacts on organisations when customers have good and bad experiences. Link this to the key content areas in the unit specification.
- Identify current regulations linked to service in the travel and tourism industry. Learners could be set a task to independently research regulatory and organisational requirements, standards and practices and explore the consequences of failing to meet these. They could then present back their findings to the rest of the group.

Learning aim B: Demonstrate customer service in different travel and tourism situations

- For content area B1, you should ensure learners have the background knowledge to demonstrate these skills before they are assessed.
- Your input and the activities you ask learners to undertake are key to a successful assessment. There are several websites that allow free use of activities based around listening and questioning (refer to the Resource list).
- Facilitate a number of question and answer (Q&A) or 'mind map' sessions to introduce content area B1 to check learners' knowledge regarding customer service skills and behaviours.
- You could then deliver a series of sessions focusing on presentations to cover the learning aim content, such as communication and interpersonal skills, along with learner-led presentations and research opportunities to consolidate their learning.
- For content area B2, offer activities that focus on each of the key elements in the specification and that give learners the opportunity to listen, question and adopt the appropriate body language. This will include a wide range of customer-service situations (see unit specification).
- Practise role plays in small groups; this will be essential to develop confidence and skills in preparation for assessment. You could give learners a scenario to role play and allocate one person as an observer to take notes and give feedback.
- It is important to allow time for learners to reflect on their role-play scenarios, so ensure there are activities where learners can write up short paragraphs outlining what they did and what they would do different, explaining why.



Learning aim C: Review effectiveness of own performance in customer service to add value to travel and tourism organisations

- For content area C1, you could begin by introducing methods of review and evaluation. Learners may find it difficult to carry out self-evaluation, give and receive feedback. Introduce paired or small group activities to help develop learners' confidence and their ability to apply these skills and use them effectively.
- Use skills audits, or analyse their strengths, weaknesses, opportunities and threats and templates for action plans to ensure learners can complete this learning aim in the required depth (refer to the Resource list).
- For content area C2, learners should examine how the development of their skills will contribute to the potential business success of an organisation. They could link their action plan to the core values and selection requirements of a specific organisation with a view to a job application in the future.

Learning aim D: Plan to monitor and improve customer service to achieve organisational objectives

- For content area D1, learners could identify different ways of monitoring customer satisfaction. You could give a general presentation on how different organisations in your own country and across the travel and tourism industry can use data analysis, online feedback, customer data/information from loyalty programmes, competitor analysis and performance indicators. Set learners guided research into selected organisations. Discuss the reliability of different methods.
- For content area D2, conduct an open discussion with the learners to explore the speed of technological developments. For example, do they use comparison sites? Are they influenced by review websites? How have mobile phones developed? What functions does their mobile phone have? Give an example of how technology developed as they were growing up and make comparisons between the speed of technological development then and now. Discuss customer expectations about the speed and accuracy of information and service. Use the TUI Travel video clip on the use of technology to enhance the customer journey (refer to the Resource list) and evaluate the reliability and validity of this information.
- For content area D3, investigation of a high-profile campaign such as Air Canada's 'Travel like a Canadian' will give learners an opportunity to analyse what has been effective and how the organisation could still improve its customer service. Research OYO rooms and discuss how the world's fastest growing company and the second-largest hotel group in China is meeting customer needs with budget accommodation.
- For content area D4, establish what is meant by 'the customer journey'. Learners could use techniques such as mind mapping to explore their own interpretation of the customer journey. Use the TUI Travel video of the customer journey linked to the TUI vision (refer to the Resource list). You could use a case study to identify how successful travel organisations create a customer-focused brand that implements high standards of service and achieve their organisational objectives. Also use the Virgin Atlantic case study (refer to the Resource list).
- Give learners hypothetical scenarios to produce plans to recommend ways in which the organisations could develop their monitoring methods to improve customer service and ensure customer loyalty. Learners should be encouraged to critically discuss the validity of recommendations and consider how good practices from other organisations could be used to help justify their recommendations.

Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

This unit links to:

- Unit 1: The Travel and Tourism Industry
- Unit 5: Travel and Tourism Enterprises
- Unit 8: The Airport Experience
- Unit 9: Visitor Attractions
- Unit 11: Events, Conferences and Exhibitions for the Travel and Tourism Industry
- Unit 12: Investigating Overseas Working
- Unit 13: Work Experience in Travel and Tourism

Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC International Level 3 Qualification in Travel and Tourism. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

Textbooks

Dale, G – *BTEC Level 3 National Travel and Tourism Student Book 1* (Pearson, 2010) ISBN 9781846907272. This book links to the old specification; however, it may assist learners with some of the key content in the current unit

Journals

These online journals give the latest news and job information across the travel industry:

Travel Trade Gazette – search for ‘TTG media’

Travel Weekly search for ‘Travel Weekly’

Videos

Search YouTube for the following videos to introduce the unit and support content area A1:

- ‘Richard Branson why customers come 2nd at Virgin’ – Richard Branson talks about the value of staff to the customer service experience
- ‘Taxi Terry’ – explores meeting customer expectations
- ‘Working for Virgin Atlantic’ – introduces content area A1
- The following videos support content area B2:
- ‘Heathrow: Britain's Busiest Airport (ITV)’ – a range of videos highlighting what happens in a busy airport
- ‘Thomson training video’ – demonstrates the importance of language when communicating with others
- The following videos support learning aim D:
- ‘TUI Customer Journey: Our Vision’
- ‘TUI Travel Corporate VT’



Websites

Useful for content area A1:

- EasyJet – search for ‘Easy Jet customer charter’
- Virgin Trains – search for ‘Virgin Trains passenger charter’

Useful for content area A1:

- TUI – search for ‘TUI customer welfare’

Useful for content area B1:

- Trainers Warehouse – search for ‘Communication and listening exercises’

Useful for content area C1:

- Reference – search for ‘What is a personal action plan?’

Useful for content area D1:

- Merlin Entertainments – search for ‘Merlin Entertainments annual report’. Useful for research, monitoring and analysis of customer service

Useful for content area D3:

- Air Canada – search for ‘Travel Like a Canadian’. Shows how Air Canada meets customer needs and caters for diversity
- OYO rooms – use to consider relevance of customer service

Useful for content area D4:

- Virgin Atlantic – search for ‘Business Case Studies’ and ‘Business Case Studies Virgin Atlantic building an airline’ for a customer case study

Pearson is not responsible for the content of any external internet sites. It is essential for tutors to preview each website before using it in class so as to ensure that the URL is still accurate, relevant and appropriate. We suggest that tutors bookmark useful websites and consider enabling learners to access them through the school/college intranet.