

SVQ2 in Travel Services (Leisure and Business Travel Services) at SCQF Level 5 (4931)

Qualification handbook for centres
Leisure and Business



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SVQ2 in Travel Services (Leisure and Business Travel Services) at SCQF Level 5 (4931)

Qualification handbook for centres

Qualification title	Number	QAN
SVQ2 in Travel Services (Leisure and Business Travel Services) at SCQF level 5	4931-51	GL1Y 22

Version and date	Change detail	Section
1.2 Oct 2011	updated front page	
1.2 Oct 2011	Unit 508 - amendment to element 2 evidence requirements	page 58
1.2 Oct 2011	Unit 518 - added evidence requirements	page 109
1.2 Oct 2011	Unit 519 - added evidence requirements	page 116
1.2 Oct 2011	Unit 521 - added evidence requirements	page 127
1.2 Oct 2011	Unit 604 - added evidence requirements for element 3	page 139
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3.0 Feb 2016	Units 502-512, 604 edited to reflect updated NOS for these units. Unit 604 amended to Level 5	Units
	Removed 4931-22 and -32 programmes of study, added new unit 622 Maintain a professional social network	Throughout document
3.1 May 2016	Edited title to add (Leisure and Business Travel Services)	Throughout document
21 October 2016	Unit 604 - deleted element Remit foreign exchange to suppliers which also included The assessor may assess 3a-3d through questioning.	Unit 604 TT17 Only
23 June 2022	Qualification and QAN numbers corrected.	pages 1, 5 and 10
	Address updated.	Appendix 2

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Contents

1	Introduction to the qualification	5
2	Centre requirements	10
3	Course design and delivery	12
4	Assessment	13
5	Units	15
Unit 501	Give customers a positive impression of yourself and your organisation (TTo6) (ICS 9)	16
Unit 502	Make sure your own actions reduce risks to health and safety (TTo7) (ENTO Unit HSS1)	20
Unit 503	Develop and maintain your effectiveness at work (TT10) (HABIA Unit G8)	25
Unit 504	Arrange non multi-sector air travel (TT11)	30
Unit 505	Help customers to choose and book travel services (TT19)	36
Unit 506	Process travel and tourism services payments (TTo3)	46
Unit 507	Assist customers prior to and after travelling (TTo4)	52
Unit 508	Set up and maintain promotional displays (TTo5)	59
Unit 509	Research travel and destination information (TTo8)	66
Unit 510	Identify and provide tourism-related information and advice (TT14)	70
Unit 511	Arrange travel itineraries (TT20)	75
Unit 522	Build and maintain face-to-face relationships with customers (TT49)	80
Unit 604	Complete foreign exchange transactions (TT17)	85
Unit 605	Obtain and analyse customer feedback (TT23)	91
Unit 622	Maintain a professional social network (TT54)	95
Appendix 1	Relationships to other qualifications	98
Appendix 2	Sources of general information	100

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1 Introduction to the qualification

This document contains the information that centres need to offer the following qualification:

Qualification title and level	City & Guilds qualification number	Qualification accreditation number	Last registration date	Last certification date
SVQ2 in Travel Services (Leisure and Business Travel Services) at SCQF level 5	4931-51	GL1Y 22	Please consult the Walled Garden for last registration and certification dates	

Area	The SVQ2 in Travel Services (Leisure and Business Travel Services) at SCQF Level 5...
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Who is the qualification for?	...meets the needs of candidates who work or want to work as a travel consultant in the travel services sector.
What does the qualification cover?	...allows candidates to learn, develop and practise the skills required for employment and/or career progression in the travel services sector.
Is the qualification part of a framework or initiative?	... is the part of the Travel Services Apprenticeship framework.

This qualification is suitable for those candidates already working in the travel industry and looking to continue to grow their career in a travel agency, head office tour operators or at resorts. This qualification offers candidates the choice of three pathways in leisure and business, tour operators (head office) or tour operators (field staff). All three pathways are now part of the travel services apprenticeships.

1.1 Qualification structure

To achieve the SVQ2 in Travel Services (Leisure and Business Travel Services) at SCQF Level 5, learners must achieve three units from the mandatory units, one unit from the specialist units and three units from the optional units, this can include the specialist unit not already taken.

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

City & Guilds unit number	Unit title	Mandatory/ optional for full qualification	SCQF level	SCQF credit value
Unit 501	Give customers a positive impression of yourself and your organisation	Mandatory	5	6
Unit 502	Make sure your own actions reduce risks to health and safety	Mandatory	5	8
Unit 503	Develop and maintain your effectiveness at work	Mandatory	5	3
Unit 504	Arrange non-multi-sector air travel	Specialist	5	4
Unit 505	Help customers to choose and book travel services	Specialist	5	16
Unit 506	Process travel and tourism services payments	Optional	5	3
Unit 507	Assist customers prior to and after travelling	Optional	5	4
Unit 508	Set up and maintain promotional displays	Optional	5	3
Unit 509	Research travel and destination information	Optional	5	2
Unit 510	Identify and provide tourism-related information and advice	Optional	5	4
Unit 511	Arrange travel itineraries	Optional	5	6

Unit 604	Complete foreign exchange transactions	Optional	5	6
Unit 605	Obtain and analyse customer feedback	Optional	6	4
Unit 622	Maintain a professional social network	Optional	6	4

LEISURE AND BUSINESS
7 units in total

All mandatory units:

Unit 501
Give customers a positive impression of yourself and your organisation (6 credits)

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

Unit 503
Develop and maintain your effectiveness at work (3 credits)

Plus 1 specialist unit from:

Unit 504
Arrange non-multi-sector air travel (4 credits)

Unit 505
Help customers to choose and book travel services (16 credits)

Plus 3 optional units from:

Unit 504
Arrange non-multi-sector air travel (4 credits)

Unit 505
Help customers to choose and book travel services (16 credits)

Unit 506
Process travel and tourism services payments (3 credits)

Unit 507
Assist customers prior to and after travelling (4 credits)

Unit 508
Set up and maintain promotional displays (3 credits)

Unit 509
Research travel and destination information (2 credits)

Unit 510
Identify and provide tourism-related information and advice (4 credits)

Unit 511
Arrange travel itineraries (6 credits)

Unit 522
Build and maintain face-to-face relationships with customers (4 credits)

Unit 604
Complete foreign exchange transactions (6 credits)

Unit 605
Obtain and analyse customer feedback (4 credits)

Unit 622
Maintain a professional social network (4 credits)

1.2 Opportunities for progression

On completion of this SVQ2 in Travel Services (Leisure and Business Travel Services) at SCQF Level 5 candidates may progress into the following City & Guilds qualifications:

- City & Guilds SVQ3 in Tourism Services (Leisure and Business Travel Services) at SCQF Level 6

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description	How to access
Qualification handbook	www.cityandguilds.com
Promotional materials	www.cityandguilds.com
Fast track approval form	www.cityandguilds.com

2 Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the qualification Level 2 NVQ in Travel and Tourism Services (4847 – 01/02/03/04/05) will receive automatic approval for the City & Guilds SVQ2 in Travel Services (Leisure and Business Travel Services) at SCQF Level 5 (4931-51).

2.1 Resource requirements

Human resources

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- have recent relevant experience in the specific area they will be assessing
- be occupationally knowledgeable in the area for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- update their occupational expertise and industry knowledge in the areas being assessed and verified through Continuous Professional Development
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal quality assurers, but must never internally quality assure their own assessments.

Assessors and internal quality assurers

Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying this qualification or meet the relevant experience requirements outlined above.

External verifier (EQA)

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

EQAs are responsible for:

- making approval visits/recommendations to confirm that organisations can satisfy the approval criteria
- ensuring that internal verifiers/qualification co-ordinators are undertaking their duties satisfactorily
- monitoring internal quality assurance systems and sampling assessment activities, methods and records

- providing prompt, accurate and constructive feedback to all relevant parties on the operation of centres' assessment systems
- maintaining records of centre visits and making these available for auditing purposes
- promoting best practice
- helping centres to develop internal assessment and evidence evaluation systems that are fair, reliable, accessible and non-discriminatory
- acting as a source of advice and support.

For more information on external quality assurance and non-compliance please refer to the Providing City & Guilds qualifications - A guide to centre and qualification approval available on www.cityandguilds.com

External Quality Control

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

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

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

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Age restrictions

This qualification is not approved for use by candidates under the age of 16, and City & Guilds cannot accept any registrations for candidates in this age group.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

4 Assessment

4.1 Summary of assessment methods

For this qualification, candidates will be required to complete a portfolio of evidence for the **full qualification**. For detailed People 1st Assessment Strategy please go to www.people1st.co.uk

4.2 Evidence requirements

Witness Testimony

Witness testimonies can be obtained from people that are occupationally competent and whom may be familiar with the National Occupational Standards, such as the candidate's line manager. They may also be obtained from people who are not occupationally competent, and do not have a knowledge of the National Occupational Standards, such as other people within the candidate's workplace, customers and suppliers. The assessor must judge the validity of the witness testimony and these may vary depending on the source.

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

- 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.

Professional Discussion

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

Simulation

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

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

- 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
- TT37 Deal with travel and tourism problems and emergencies

4.3 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at:

www.cityandguilds.com/eportfolios.

4.4 Recognition of prior learning (RPL)

Recognition of Prior Learning (RPL) recognises the contribution a person's previous experience could contribute to a qualification. RPL is allowed and is also sector specific.

5 Units

Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- title
- level
- SCQF credit value
- unit aim
- unit content

Summary of units

City & Guilds unit number	Unit title	SCQF level	SCQF credit value
Unit 501	Give customers a positive impression of yourself and your organisation	5	5
Unit 502	Make sure your own actions reduce risks to health and safety	5	8
Unit 503	Develop and maintain your effectiveness at work in a travel and tourism environment	5	2
Unit 504	Arrange non-multi-sector air travel	5	4
Unit 505	Help customers to choose and book travel services	5	16
Unit 506	Process travel and tourism services payments	5	3
Unit 507	Assist customers prior to and after travelling	5	4
Unit 508	Set up and maintain promotional displays	5	3
Unit 509	Research travel and destination information	5	2
Unit 510	Identify and provide tourism-related information and advice	5	4
Unit 511	Arrange travel itineraries	5	6
Unit 604	Complete foreign exchange transactions	5	6
Unit 622	Maintain a professional social network	6	4

Unit 501

Give customers a positive impression of yourself and your organisation (TTo6) (ICS 9)

Level: 5

Credit value: 6

What is the unit about?

This unit is all about communicating with customers and giving a positive impression of yourself whenever you deal with them. By doing this you will also be giving a positive impression of your organisation and the customer service it provides.

Who is the unit for?

The unit is recommended for all staff engaged in customer facing activities.

Outcomes of effective performance

When you give customers a positive impression of yourself and your organisation you must consistently:

1. Establish effective rapport with customers

- 1a. meet your organisation's standards of appearance and behaviour
- 1b. greet your customer respectfully and in a friendly manner
- 1c. communicate with your customer in a way that makes them feel valued and respected
- 1d. identify and confirm your customer's expectations
- 1e. treat your customer courteously and helpfully at all times
- 1f. keep your customer informed and reassured
- 1g. adapt your behaviour to respond effectively to different customer behaviour

2. Respond appropriately to customers

- 2a. respond promptly to a customer seeking assistance
- 2b. select the most appropriate way of communicating with your customer
- 2c. check with your customer that you have fully understood their expectations
- 2d. respond promptly and positively to your customers' questions and comments
- 2e. allow your customer time to consider your response and give further explanation when appropriate

3. Communicate information to customers

- 3a. quickly locate information that will help your customer
- 3b. give your customer the information they need about the services or products offered by your organisation
- 3c. recognise information that your customer might find complicated and check whether they fully understand
- 3d. explain clearly to your customers any reasons why their needs or expectations cannot be met

Scope

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

- **Communicate with / respond to customers:** during routine delivery of customer service, during a busy period for your organisation, during a quiet period for your organisation, when people, systems or resources have let you down.
- **Customers:** who have different needs and expectations, who appear angry or confused, who behave unconventionally

Knowledge and understanding

General knowledge and understanding

To be competent at doing your job in a customer friendly way you must know and understand:

- your organisation's standards for appearance and behaviour
- your organisation's guidelines for how to recognise what your customer wants and respond appropriately
- your organisation's rules and procedures regarding the methods of communication you use
- how to recognise when a customer is angry or confused
- your organisation's standards for timeliness in responding to customer questions and requests for information

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Unit 502

Make sure your own actions reduce risks to health and safety (TTo7) (ENTO Unit HSS1)

Level: 5
Credit value: 8

What is the unit about?

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

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

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

Who is the unit for?

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

Outcomes of effective performance

You must be able to:

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

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

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

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

Behaviours which underpin effective performance

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

Performance evidence

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

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

Knowledge and understanding

General knowledge and understanding

You must know:

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

You must understand:

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

Industry-specific knowledge and understanding

You must know:

- your scope and responsibility for controlling risks

You must understand:

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

Context-specific knowledge and understanding

You must know:

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

Scope

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

Risks: the use and maintenance of machinery or equipment, the use of materials or substances, working practices which do not conform to laid down policies, unsafe behaviours, accidental breakages and spillages, environmental factors.

Workplace instructions: the use of safe working methods and equipment, the safe use of hazardous substances, smoking, eating, drinking and drugs, what to do in the event of an emergency, personal presentation.

Unit 503

Develop and maintain your effectiveness at work (TT10) (HABIA Unit G8)

Level: 5

Credit value: 3

What is the unit about?

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 and business.

Who is the unit for?

The unit is recommended for anyone working within travel and tourism services

Outcomes of effective performance

You must be able to:

1. Improve your personal performance at work, so that:

- 1a. our own strengths and weaknesses are accurately identified and discussed with the relevant person
- 1b. your own contribution to business success is accurately identified and discussed with the relevant person
- 1c. when task instructions are unclear, more information is sought from relevant people
- 1d. available feedback from relevant people is used to identify how your performance can be improved
- 1e. opportunities to learn from colleagues are requested and taken when available
- 1f. developments and trends in the business and wider travel and tourism services industry are regularly reviewed
- 1g. realistic work targets are agreed with the relevant person and progress regularly reviewed
- 1h. your personal development plan is regularly reviewed and updated

2. Work effectively as part of a team, so that:

- 2a. ways of working together to achieve objectives are agreed
- 2b. necessary help and information from colleagues is politely requested
- 2c. requests for assistance from colleagues are responded to willingly and politely
- 2d. the needs of others are anticipated and assistance is promptly offered within your capabilities
- 2e. your time is used effectively throughout your working day
- 2f. problems likely to affect travel and tourism services are reported to the relevant person promptly and accurately
- 2g. any misunderstandings with your colleagues are promptly resolved
- 2h. contact you have with colleagues is friendly, helpful and respectful

Behaviours which underpin effective performance

- Be alert to opportunities for learning and practising skills and knowledge
- Seek feedback on your performance from colleagues and managers
- Make effective use of time
- Take ownership of goals and targets
- Keep professional knowledge current and up to date
- Demonstrate personal drive to deliver the business vision and objectives

Performance evidence

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

- at least **one** from **opportunities to learn**:
 - a) from colleagues and other relevant people
 - b) by active participation in training and development activities
 - c) active participation in workplace activities
- at least **one** from **targets**:
 - a) profit margins
 - b) productivity
 - c) personal development
- at least **one** from **assistance**:
 - a) on a one-to-one basis
 - b) in a group

Knowledge and understanding**General knowledge and understanding**

You must know:

- how to identify your own strengths and weaknesses
- how to react positively to reviews and feedback and why this is important
- how to support co-operative ways of working (e.g. anticipate the needs of others for information and support, avoid actions that discriminate against others or offend others, act assertively when needed to protect your own rights, show that you are willing to help resolve disagreements)
- how to manage your time effectively
- how to deal with relationship difficulties and conflicts when working with others

You must understand:

- the importance of meeting your work targets
- the importance of continually using and updating your own personal development plan
- why harmonious working relationships are important

Industry-specific knowledge and understanding

You must know:

- any commercially viable range of times for the performance of the travel and tourism services offered
- the questioning and listening skills you need in order to find out information
- how using the National Occupational Standards for travel and tourism services can help you identify your development needs
- how to access information on National Occupational Standards and qualifications, relevant to travel and tourism services
- how to maintain awareness of current and emerging trends and developments within the industry and why this is important

Context-specific knowledge and understanding

You must know:

- your job role and responsibilities and how this relates to the role of other team members
- the limits of your own authority and that of others in relation to giving assistance
- the standards of behaviour that are expected of you when working in the workplace
- your organisation's appeal and grievance procedures
- your productivity targets and time scales and how these impact on business success
- your personal development targets and time scales and how these impact on business success
- who can help you identify and obtain opportunities for your development/training
- who to report to when you have difficulties in working with others
- how to get information about your job, your work responsibilities and the standards expected of you
- how to find out relevant information about other people's areas of responsibility

You must understand:

- why it is important to work within your job responsibilities and what might happen if you do not do so
- the importance of continuous professional development and how it affects your job role

Scope

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

- **Business success:** financial, customer satisfaction, vision and values

Unit 504

Arrange non multi-sector air travel (TT11)

Level: 5

Credit value: 4

What is the unit about?

This unit describes the competence required to arrange straightforward, non multi-sector air travel such as charter, 'no frills' and consolidated flights together with other scheduled services. The unit does not carry IATA licensing as IATA bookings are made via a third party.

Who is the unit for?

The unit is recommended for staff engaged in face to face and other customer contact

Outcomes of effective performance

You must be able to:

- 1. Identify your customer's air travel requirements, so that:**
 - 1a. your customer's needs are accurately summarised and confirmed to them
 - 1b. customers are advised of the accurately calculated total cost of their booking
 - 1c. any restrictions applicable to the customer are accurately explained in language they will understand
 - 1d. necessary records of customer enquiries are complete, accurate and correctly stored

- 2. Complete air travel bookings so that:**
 - 2a. customers agree to the terms and conditions prior to confirming the booking
 - 2b. bookings for air travel services that accurately match the details agreed with your customer are confirmed
 - 2c. all booking administration is processed promptly, correctly and following your organisation's and supplier's procedures
 - 2d. booking information and documentation is stored securely following your organisation's procedures and legal requirements

- 3. Process booking documentation, so that:**
 - 3a. ticketing and payment arrangements applicable to the type of ticket booked are accurately explained following your own organisation's and supplier's procedures
 - 3b. correct copies of booking documents are issued to the relevant person(s), where required
 - 3c. all customer records are completed fully and accurately and passed to the relevant person(s) promptly

Behaviours which underpin effective performance

- Greet customers in a prompt, friendly and confident way
- Clarify and record your customer's air travel services requirements using suitable questioning techniques and listening skills
- Refer all matters outside your work responsibilities or experience to the relevant person(s)

Performance evidence

This must be gathered through observing the candidate'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

• **Unit 504** **Arrange non multi-sector air travel (TT11)**

Knowledge and understanding

General knowledge and understanding

You must know:

- why it is important to show an interest in the customer by displaying a professional attitude and creating a positive impression using your own, colleagues' and suppliers' knowledge and experience

You must understand:

- what are meant by open and closed questioning techniques, and when to use them
- the importance of listening effectively to customers
- why it is important to ensure that information provided to customers is accurate and up to date
- the importance of recording information
- the need for confidentiality and the implications of the data protection legislation
- the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers

Industry-specific knowledge and understanding

You must know:

- the names and location of continents and countries
- the location of major tourist attractions and special events in the UK, Europe and throughout the world
- the different time zones throughout the world and how they impact on the customer
- the insurance requirements linked to the type of air travel services
- sources of information relating to air travel services and how to use and interpret them
- the main types of air products and suppliers
- what ATOL stands for and what protection ATOL offers
- what the CAA, EASA and IATA stands for and what their roles are
- the phonetic alphabet
- what is meant by scheduled flights and charter flights
- what is meant by published IATA fares, consolidated fares and 'no frills' fares
- 3-letter airport codes, 2-letter airline codes and how to encode and decode them
- airport departure and ticketing taxes
- service charges - what they are and when they need to be applied
- the need for confidentiality and the implications of the data protection legislation
- the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers
- a travel agent's main responsibilities under current industry codes of practice
- how to calculate check-in times, terminal information and elapsed journey times
- the free baggage allowances for the airlines you use

- how to read maps to identify the location of major airports, destinations, major cities and country groups

- how to identify and interpret booking conditions and specific restrictions relating to the air travel products and services

You must understand:

- foreign visa types and where to find information on visa and passport entry requirements
- your legal obligations for advising customers (e.g. general requirements of air travel legislation, ATOL financial protection arrangements (if appropriate); passenger liability restrictions (if appropriate); booking conditions; passport, visa, health and insurance requirements, including current, applicable regulatory guidelines for insurance selling
- the consequences of misrepresentation
- what information to give customers to enable them to find out current, mandatory and recommended health precautions
- the different entry requirements for EU and non-EU passport holders to major tourist destinations worldwide
- the types of questions to ask customers concerning passports and visas

Context-specific knowledge and understanding

You must know:

- the importance of recording information
- your organisation's procedures relating to the sale of air travel services and the importance of following them
- how to explain relevant booking conditions and restrictions so that they are understood by your customers

You must understand:

- why it is important to ensure that information provided to customers is accurate and up to date
- the importance of recording information
- your organisation's procedures relating to the sale of air travel services and the importance of following them

Scope

Air travel services

Charter flight, no frills flight, consolidated flights, other scheduled services

Terms and conditions

Insurance requirements, itinerary, restrictions

Unit 505

Help customers to choose and book travel services (TT19)

Level: 5
Credit value: 16

What is the unit about?

This unit describes the competence required to book and process a limited range of straightforward travel services at the request of customers who know exactly what they require. The ability to confirm customers' requirements, carry out the necessary administrative tasks and deal with associated travel documentation is required.

Who is the unit for?

The unit is recommended for staff engaged in customer contact roles whether face-to-face or not.

Outcomes of effective performance

You must be able to:

1. Help customers to identify their travel requirements and select products so that:

1a. customers' travel services requirements are identified and clarified

1b. customers' needs are accurately summarised

1c. the total costs of the travel arrangements are accurately calculated

1d. customers are advised of the total cost of their travel arrangements

1e. customers' acceptance of the proposed arrangements is obtained

2. Capture and process customer information, so that:

2a. customers' consent to record the necessary information is obtained

2b. information is recorded quickly, accurately and in the required format

2c. confidentiality of information is maintained

2d. information is processed and stored to meet organisational and legal requirements

2e. objections to personal information being recorded are handled so as to maintain good customer relations

3. Complete travel services bookings so that:

3a. travel services and any additional services accurately match the details agreed with your customers

3b. the booking is completed to meet your organisation's procedures and other legal and regulatory requirements

3c. all booking administration is processed promptly, correctly and following your organisation's procedures

3d. booking information and documentation is stored securely following your organisation's procedures and legal requirements

4. Process post-booking documentation so that:

4a. bookings have a supplier confirmation that matches the services booked

4b. the correct copies of booking documents are issued to the relevant person(s)

4c. booking documentation is promptly and accurately updated, when required

4d. all matters outside your work responsibilities or experience are referred to the relevant person(s)

5. **Receive, prepare and issue travel documentation, so that:**
- 5a. all documentation received matches the travel services booked
- 5b. any documentation discrepancies are resolved promptly and appropriately before issue to customers
- 5c. complete and accurately assembled documentation and any necessary tickets are issued to your customers within the required time scale and following your organisation's procedure
- 5d. booking details are clearly reconfirmed to your customers
- 5e. all travel arrangements are clearly and fully explained to your customers in a way they will understand
- 5f. customers have fully understood their travel arrangements and are satisfied with your service before they leave your premises
- 5g. all customer records are completed fully and accurately and passed to the relevant person(s) promptly

Behaviours which underpin effective performance

- Greet your customers in a prompt, friendly and confident way
- Use suitable questioning techniques and listening skills and record the results
- Question your customers on their travel requirements to identify their requirements
- Take opportunities to offer additional services

Scope

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

- **Travel services** - package holidays, accommodation only, ferry travel only, flight only
- **Additional services** - car hire, transport to and from departure point, car parking, insurance, tour operator's extras, mobility requirements
- **Customers** – individual, organisation, small group
- **Record** - manually, electronically
- **Information** - customer contact details, product enquiries, relevant interests
- **Processed and stored** - manually, electronically
- **Tickets** - pre-issued, tickets on departure (TOD)
- **Travel arrangements** - check in times, luggage allowance, security procedures, departure point information

Knowledge and understanding

General knowledge and understanding

You must know:

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

You must understand:

- the main requirements of legislation affecting the collection, storage and use of personal information
- the need for maintaining customer confidentiality
- the importance of accurate and secure record keeping

Industry-specific knowledge and understanding

You must know:

- the location of the most visited outbound destinations in the world for UK visitors
- the location of major tourist attractions and special events in the UK, Europe and throughout the world
- the types of currency in use in major tourist destinations worldwide
- the official languages in use in major tourist destinations worldwide
- the types of climate found in major tourist destinations worldwide
- world time zones and their impact on your customers
- the elements that make up a package
- where to find accurate and up to date information to support the booking
- passport and visa types and where to find information on visa and passport entry requirements
- what information to give customers to enable them to find out current mandatory and recommended health precautions and regulations
- the different entry requirements for EU and non-EU passport holders to major tourist destinations worldwide
- car rental terms and abbreviations
- main conditions of rental including eligibility (e.g. age, endorsements)
- the car insurance provision offered by the car hire suppliers used by your organisation, including collision damage waiver, personal accident insurance and top ups
- sources of information on major parking operators at the main UK airports
- sources of information on airport taxi and transport arrangements to major UK departure points
- types of travel insurance available including amounts of cover, conditions, exclusions and excesses
- what ATOL stands for and what protection ATOL offers; what products are and are not covered
- the meaning of basic terms and abbreviations used on travel documentation
- the booking terms and conditions and any restrictions applying to the travel and additional services you are booking
- 3-letter airport codes and how to encode and decode them
- types of tickets available for travel services and any conditions attached to their issue

Industry-specific knowledge and understanding (continued)

You must know:

- methods of making documents available to customers
- the consequences of making booking errors
- the consequences of incorrectly issuing and processing documents
- 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
- how to present costings to customers
- how to explain relevant booking conditions and restrictions so that they are understood by your customers
- how to use and interpret reference sources to provide information and costings for different customer groups and pricing tariffs.
- how to determine customers' eligibility for different insurance products (e.g. regarding age, pregnancy, medical history, etc.)
- how to interpret the travel arrangement information on travel documentation
- how to complete suppliers' manual or electronic booking documentation
- how to use the phonetic alphabet
- how to complete tickets, vouchers and associated documentation
- how to ensure tickets, vouchers and associated documentation are accurate

You must understand:

- why it is important to ensure that information provided to customers is accurate and up to date
- the consequences of misrepresentation (e.g. in the context of brochure amendments and or updates) during discussions with customers
- the value of customer information to:
 - a. establishing current trends in travel and tourism customers' wants and needs
 - b. tailoring offers to specific customers' profiles
 - c. maintaining contact with customers and building customer loyalty
- the importance of following organisational systems for recording and processing information and that these differ between organisations
- how and when to question customers about passports and visas and any health requirements

Context-specific knowledge and understanding

You must know:

- what information needs to be collected to meet company needs
- how information must be collected, processed and stored to meet organisation and legal requirements
- your organisation's procedures relating to the sale of travel services and insurance and the importance of following them
- your organisation's procedures for hand-over of travel documentation
- your organisation's position on preferred operators
- your organisation's procedures for completing and processing manual and/or computer bookings, processing booking documentation, monitoring and logging bookings
- your organisation's procedures for the distribution and storage of booking documentation (including tickets, vouchers, and policies, etc.)
- the types of travel documentation that can be issued and completed in your workplace

You must understand:

- your legal obligations when advising customers, including general requirements of package holiday legislation, including ATOL financial protection arrangements (if appropriate); booking conditions; passport, visa, health and insurance requirements, including current, applicable regulatory guidelines for insurance selling
- the limits of your responsibility for handling documentation discrepancies and to whom you should report any problems

Unit 505

Help customers to choose and book travel services (TT19)

Evidence requirements

Unit	TT19 Help customers to choose and book travel services
ELEMENT	Help customers to identify their travel requirements and select products
What you must DO	The assessor must assess 1a-1e by directly observing the candidate's work.
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">• at least three from travel needs<ul style="list-style-type: none">a) package holidaysb) accommodation onlyc) ferry travel onlyd) flight only <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
ELEMENT	Capture and process customer information
What you must DO	<p>The assessor must assess 2a-2d by directly observing the candidate's work.</p> <p>The assessor may assess 2e through questioning, witness or other documentary evidence demonstrating competence.</p>
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">• at least one from customers<ul style="list-style-type: none">a) individualb) organisationc) small group• at least one from record<ul style="list-style-type: none">a) manuallyb) electronically• at least one from information<ul style="list-style-type: none">a) customer contact detailsb) 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.

ELEMENT	Complete travel services bookings
What you must DO	The assessor must assess 3a-3d by directly observing the candidate's work.
What you must COVER	There must be performance evidence, gathered through observing the candidate's work for: <ul style="list-style-type: none">• at least three from travel services<ul style="list-style-type: none">a) package holidaysb) accommodation onlyc) ferry travel onlyd) flight only• at least three from additional services<ul style="list-style-type: none">a) car hireb) transport to and from departure pointc) car parkingd) insurancee) tour operator's extrasf) mobility requirements

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

ELEMENT	Process post-booking documentation
What you must DO	The assessor must assess 4a-4d by directly observing the candidate's work.

ELEMENT	Receive, prepare and issue travel documentation
What you must DO	The assessor may assess 5a-5g 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: <ul style="list-style-type: none">• at least three from travel services<ul style="list-style-type: none">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.

Specific evidence requirement

Simulation is **not** allowed for any performance evidence within this Unit.

Unit 506

Process travel and tourism services payments (TT03)

Level: 5

Credit value: 3

What is the unit about?

This unit describes the competence of handling a wide variety of methods of payment for travel and tourism services. The unit covers receiving and storing payments, issuing related documentation and maintaining the security of payments received.

Who is the unit for?

The unit is recommended for staff engaged in the receipt of different types of payment by a variety of means through direct contact with customers.

Outcomes of effective performance

You must be able to:

- 1. Issue invoices and receive payments so that:**
 - 1a. Customers are issued with an accurate bill or invoice clearly presenting the cost breakdown of chosen services
 - 1b. customers are aware of the final total amount to be paid
 - 1c. customers are aware of the methods of payment that are acceptable, and any charges or restrictions that may be attached
 - 1d. the organisation's policies and procedures are followed regarding payment discrepancies, non- cash payments, transaction values, and limits
 - 1e. change given for cash payments is accurate
 - 1f. the security of cash and other payments is maintained
 - 1g. correct procedures are used to maintain confidentiality of customers' purchases and payment information

- 2. Issue receipts and store payments so that:**
 - 2a. all internal payment records are completed accurately and follow the organisation's procedures
 - 2b. customers receive legible and accurate receipts
 - 2c. all payments are stored securely and protected

Behaviours which underpin effective performance

- Be courteous to customers at all times
- Take prompt action to rectify mistakes if necessary
- Give and explain any information required by customers clearly and accurately
- Act with integrity on matters that affect business finance

Scope

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

- **Methods of payment:** credit card, debit card, personal cheque, currency card, vouchers, cash
- **Payment discrepancies:** out-of-date card, card not authorised, fraudulent use of card, incorrectly completed cheques, incorrect cash amounts, seemingly counterfeit notes, notes out of circulation, card not signed, incorrect PIN number
- **Protected:** from loss, from theft, from damage

Knowledge and understanding

General knowledge and understanding

You must know:

- legislative requirements relating to processing payments and recording customers' information
- the difference between charge, credit, debit and currency cards
- types of fraudulent card transactions
- the charge back process
- security features used by major card companies
- factors in sales transactions that could indicate potential fraud
- chip & pin procedures
- how to handle customers when dealing with payment discrepancies
- how to calculate amounts due correctly
- how to confirm receipt of payments and giving change to your customer

You must understand:

- relevant current currency control regulations applicable to payments for foreign exchange including money laundering provisions
- the importance of following procedures when receiving and receipting payments from customers
- potential consequences of incorrect calculations and payments
- the risks associated with transactions when the cardholder is not present and how to reduce the risk.

Industry-specific knowledge and understanding

You must know:

- the changes that apply to different methods of payment and the implications for both your organisation and customer
- who to contact if you need information, advice or payment authorisation

You must understand:

- duties and responsibilities in current industry legislation and codes of practice
- your own authority levels for handling non-cash payments and dealing with payment discrepancies
- code ten and conventional authorisation procedures

Context-specific knowledge and understanding

You must know:

- your organisation's procedures for
 - i) receiving, handling and receipting payments
 - ii) storing payments
 - iii) dealing with payment discrepancies
- how to complete payment related documentation required by your organisation
- procedures to follow in emergency situations relating to payments

You must understand:

- payment methods acceptable to your organisation

Unit 506

Process travel and tourism services payments (TT03)

Evidence requirements

Unit	TT03 Process travel & tourism services payments
ELEMENT	Receive payments
What you must DO	The assessor must assess 1a-1f by directly observing the candidate's work.
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">• at least three from methods of payment<ul style="list-style-type: none">a) credit cardb) debit cardc) personal chequed) currency carde) vouchersf) cash• at least two from payment discrepancies<ul style="list-style-type: none">a) out of date cardb) card not authorisedc) fraudulent use of cardd) incorrectly complete chequese) incorrect cash amountsf) seemingly counterfeit notesg) notes out of circulationh) card not signedi) incorrect PIN number <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
ELEMENT	Issue receipts and store payments
What you must DO	The assessor must assess 2a-2c by directly observing the candidate's work or other documentary evidence demonstrating competence

What you must
COVER

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

- **all from protected**
 - a) from loss**
 - b) from theft**
 - c) from damage**

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

Unit 507

Assist customers prior to and after travelling (TTo4)

Level: 5

Credit value: 4

What is the unit about?

This unit describes the competence required to offer assistance to travel customers in a variety of areas commonly encountered by staff in travel agencies' shops, and stores. This includes making changes to bookings initiated by the customer and or travel service supplier.

Who is the unit for?

The unit is recommended for all staff in contact with customers and responsible for customer bookings, and any queries about bookings or changes that may need to be made.

Unit 507 Assist customers prior to and after travelling (TTo4)

Outcomes of effective performance

You must be able to:

- 1. Resolve customer queries about their booking, so that:**
 - 1a. customers are clear about any implications arising from their query and receive accurate and complete information to resolve it
 - 1b. customers are offered a range of suitable courses of action and reassurance, where necessary
 - 1c. customers' consent to any course of action is secured before it is implemented and the agreed course of action is implemented promptly and accurately

- 2. Identify and make changes to bookings, so that:**
 - 2a. customers are informed promptly and accurately of any changes to their booking and the financial and other implications of any change
 - 2b. customers are offered, where available, a range of suitable alternative courses of action to resolve any problems arising from changes and their preferences are accurately established
 - 2c. agreed booking changes are made and all records are promptly and accurately updated
 - 2d. communications with suppliers are polite and professional at all times
 - 2e. customers are issued with suitably amended documentation within the required time scale following your organisation's procedures

- 3. Advise customers on how to make travel related claims and complaints, so that:**
 - 3a. travel related claims and complaints procedures are clearly explained to customers
 - 3b. customers' questions are answered correctly
 - 3c. customers fully understand the process they need to follow and the correct documentation is issued
 - 3d. customers are satisfied with your service

Behaviours which underpin effective performance

- Express apologies to your customers in the event of changes made by suppliers
- Communicate with your customers in a way that maintains their goodwill and confidence in you and your organisation
- Be clear and accurate in your explanations
- Use varied vocabulary and expressions to suit your purpose and adapting what and how much you say to suit different situations
- Show you are listening closely and responding appropriately (e.g. by using your own and interpreting other's body language)

Scope

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

- **Query:** non-arrival of documents, incomplete and or incorrect documentation, requests for additional information
- **Changes:** transport times, destination, accommodation, date of departure, date of return, length of trip, departure point, name, cancellation by supplier, cancellation by customer
- **Financial implications:** additional payment required from the customer, amendment charge payable by the customer, compensatory payment made to the customer, refund payable to the customer
- **Procedures:** completion of documents, time scale for return of documents, items to be enclosed with claims, writing covering letters, where to submit claims, follow up, further courses of action

Knowledge and understanding**General knowledge and understanding**

You must know:

- whom to refer any matters outside your work responsibilities or experience and the extent of your own authority when handling queries and changes to bookings
- relevant travel service booking conditions, including financial penalties, and how these can affect the way you handle changes and or customers' queries
- the courses of action that can be offered to resolve customers' queries and changes
- how to question customers to find out what alternatives will meet their needs

You must understand:

- the consequences of failing to complete all actions fully, promptly and correctly

Industry-specific knowledge and understanding

You must know:

- your legal obligations for advising customers, including general requirements of package holiday legislation, if relevant; booking conditions; passport, visas, health and insurance requirements
- 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
- how to calculate and explain additional payments, refunds, amendment charges, cancellation charges and compensatory payments in a way customers will understand
- how to explain changes and the reasons for them and possible courses of action
- how to seek and obtain customer agreement to a particular course of action
- how to action changes to bookings initiated by both the company and customers

You must understand:

- the importance of clear and accurate communication
- how you can adapt your communication methods to suit the different needs of customers

Context-specific knowledge and understanding

You must know:

- your organisation's procedures for
 - i. making changes to customer bookings
 - ii. handling booking and other queries
 - iii. completing customers' records
- how to access original booking details, identify and record the changes required and why it is important to do this accurately

You must understand:

- why it is important to explain all of the available alternatives (e.g. potential loss of the booking)
- what documents need to be completed, how to complete them and what happens to them
- the claims and complaints procedures and documentation for the suppliers used by your organisation
- why it is important to handle changes, customer queries, claims and complaints in a way that maintains goodwill and enhances your organisation's public image
- how to communicate effectively with customers and suppliers whilst assessing information, using reference material and making changes in order to maintain goodwill and your organisation's reputation

Unit 507 Assist customers prior to and after travelling (TTo4)

Evidence requirements

Unit	TTo4 Assist customers prior to and after travelling
ELEMENT	Resolve customers' queries about their bookings
What you must DO	The assessor must assess 1a-1c by directly observing the candidate's work or other documentary evidence demonstrating competence
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"> • at least one from queries <ul style="list-style-type: none"> a) non arrival of documents b) incomplete and/or incorrect documentation c) requests for additional information <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
ELEMENT	Identify and make changes to bookings
What you must DO	The assessor must assess 2a-2e by directly observing the candidate's work or other documentary evidence demonstrating competence
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none"> • at least five from changes <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 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.

ELEMENT	Advise customers on how to make travel-related claims and complaints
What you must DO	The assessor may assess 3a-3d through questioning, witness testimony or other documentary evidence demonstrating competence

Level: 5

Credit value: 3

What is the unit about?

This unit is concerned with setting up a variety of promotional displays and maintaining stocks of promotional materials. It also includes the production of cards and posters.

Who is the unit for?

The unit is recommended for staff engaged in front of house activities in establishments that provide travel and tourism services, and have regular contact with customers.

Outcomes of effective performance

You must be able to:

- 1. Make preparations for promotions, so that:**
 - 1a. you know the requirements for the promotion and have confirmed them and clarified if information is not complete or clear
 - 1b. the intended display area is the right size and does not affect access
 - 1c. you have the right materials, equipment and stock needed for the display and they are clean, up-to-date, safe and in good working order
 - 1d. the display area is cleared, cleaned and prepared properly before use
 - 1e. cards and posters produced are legible and match the instructions you have been given and your organisation's house style and standard required

- 2. Set up, maintain and remove promotional materials, so that:**
 - 2a. promotional materials are set up and removed correctly within the time allowed
 - 2b. displays are maintained in a clean, tidy and safe condition throughout the promotional period
 - 2c. the required levels and type of stock on display is maintained throughout the promotional period
 - 2d. information is up-to-date and in good condition at all times
 - 2e. equipment and excess materials are returned to storage
 - 2f. any materials that are out-of-date, damaged or no longer needed are disposed of safely, following your organisation's waste disposal procedures

Behaviours which underpin effective performance

- Work methodically and following your organisation's procedures
- Ensure confirmation of your activities with the relevant person(s) at all times

Scope

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

- **Requirements for the promotion:** stock and space, display position and dates, safety and security, organisational standards for promotional materials
- **Instructions:** content, deadlines, position, media, technology
- **Promotional materials:** brochures, posters, stickers, cards, labels, leaflets, web-based/multimedia

Knowledge and understanding**General knowledge and understanding**

You must know:

- the legal implications of ensuring information is correct and complies with relevant, current legislation
- the relevant health and safety legislation relating to the storage and lifting of materials
- why it is important to clean any materials and equipment you use in displays and dispose of waste materials safely and in an environmentally friendly way
- how to check for health and safety hazards and how to use any display equipment safely, including checks on its working order
- how to store promotional materials safely and keep them in good condition

You must understand:

- why promotional materials should be up-to-date, easily accessed and the potential consequences of passing on out-of-date information
- why it is important to check for potential health and safety hazards before, during and after the setting up of displays
- how placing items in specific places attracts attention and promotes sales

Industry-specific knowledge and understanding

You must know:

- how to use space effectively when displaying items

You must understand:

- the importance of displays when promoting travel and tourism products and services
- why it is important to check the accuracy and legality of information on promotional materials and how to check this information

Context-specific knowledge and understanding

You must know:

- your organisation's requirements for
 - i. standards for promotions, their maintenance and removal
 - ii. minimum stock levels for all promotional materials
 - iii. corporate image and house style of locally made cards and posters
 - iv. the disposal of out-of-date promotional materials
- your responsibilities for maintaining minimum stock levels of promotional materials
- how to check that all displayed items are accurate and up-to-date and conform to your organisation's requirements

You must understand:

- the instructions for specific promotional activities and where to access information on current promotional activities
- your organisation's image and professional branding

Unit 508 Set up and maintain promotional displays (TT05)

Evidence requirements

Unit	TT05 Set up and maintain promotional displays
ELEMENT	Make preparations for promotions
What you must DO	The assessor may assess assessment criterion 1a-1e through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">• all from requirements for the promotion<ul style="list-style-type: none">a) stock and spaceb) display position and datesc) safety and securityd) organisational standards for promotional materials• all from instructions<ul style="list-style-type: none">a) contentb) deadlinesc) positiond) mediae) technology <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
ELEMENT	Set up, maintain and remove promotional materials
What you must DO	<p>The assessor must assess assessment criteria 2b-2d by directly observing the candidate's work.</p> <p>The assessor may assess assessment criterion 2a, 2e and 2f through questioning, witness or other documentary evidence demonstrating competence</p>
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">• at least three from promotional materials<ul style="list-style-type: none">a) brochuresb) postersc) cardsd) labelse) leafletsf) web-based / multi-media

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

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Unit 509

Research travel and destination information (TTo8)

Level: 5

Credit value: 2

What is the unit about?

The focus of this unit is on the research that is necessary to maintain an accurate picture of existing and potential travel and tourism destinations and to understand why customers choose to travel to them.

Features such as facilities, local developments, transport links and attractions change over time and it is important that descriptions of destinations are up-to-date, whether that information is supplied to potential customers or other organisations (such as travel agencies).

Who is the unit for?

The unit is recommended for those people responsible for keeping travel and destination information up-to-date and accurate.

Unit 509 Research travel and destination information (TTo8)

Outcomes of effective performance

You must be able to:

1. **Research travel destination and product information, so that:**
 - 1a. suitable opportunities are recognised and used to collect useful data and information relating to travel destinations and products
 - 1b. reliable sources of information that meet your given research objectives are identified and used
 - 1c. any gaps in sets of data are identified and their impact on conclusions assessed
 - 1d. data and information are collected using a variety of suitable methods to meet your organisation's requirements
 - 1e. data and information are collected at times and frequency to meet your research objectives
 - 1f. all data and information collected is accurate and up to date, taking account of potential partiality of sources
 - 1g. data and information are accurately recorded and presented in the format required
 - 1h. data is stored securely using the organisation's information system(s) correctly and is available to appropriate colleagues

Behaviours which underpin effective performance

- Use cost-effective and time-efficient means to gather, store and retrieve relevant information
- Comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
- Enlist the support of colleagues where necessary to help identify sources, secure information and to verify findings
- Monitor the validity and reliability of information gathered
- Check that information derived is fit for purpose and adjust collection and analysis processes as necessary
- Reflect regularly on your own and others' experiences and use these to inform future action

Scope

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

- **Travel destinations:** domestic, overseas
- **Products:** attractions, local transport, tourist facilities
- **Sources:** printed, electronic
- **Record:** manually, electronically

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

You must know:

- where to find reliable data and information, how to access them and when to use them
- how to collect data which is relevant to business and customer needs eg reasons why customers visit destinations
- how to use electronic inputting and recording systems
- when it is necessary to seek additional sources to verify information and how support can be obtained to deal with verification problems
- the variety of topics on which customers typically require information

You must understand:

- why it is necessary to highlight gaps in sets of data and how such gaps can impact on conclusions

Context-specific knowledge and understanding

You must know:

- why items of data and information are needed and how they will be used
- how relevant data and information contributes to business success
- how to use your organisation's data and information systems
- your organisation's requirements and procedures for:
 - i. recording and storing data and information
 - ii. processing data and information
 - iii. presenting the outcomes of research
 - iv. disposal or archiving of data which is inaccurate, out-of-date or irrelevant

Unit 509

Research travel and destination information (TTo8)

Evidence requirements

Unit	TTo8 Research travel and destination information
ELEMENT	Research travel destination and product information
What you must DO	The assessor may assess 1a-1h through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">• at least one from travel destinations<ul style="list-style-type: none">a) domesticb) overseas • at least two from products<ul style="list-style-type: none">a) attractionsb) local transportc) tourist facilities • at least one from recorded<ul style="list-style-type: none">a) manuallyb) electronically • at least one from sources<ul style="list-style-type: none">a) printedb) electronic

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

Unit 510

Identify and provide tourism-related information and advice (TT14)

Level: 5

Credit value: 4

What is the unit about?

This unit describes the competence necessary to provide a tourism-related information and advice service. It involves the ability to accurately identify your customers' information needs and to access and use a wide variety of sources to extract information.

Who is the unit for?

The unit is recommended for staff engaged in face to face, telephone or electronic contact with customers.

Outcomes of effective performance

You must be able to:

- 1. Identify your customers' needs for information so that:**
 - 1a. customers' needs are clearly identified
 - 1b. customers are asked to clarify where the needs are not clear

- 2. Source and provide information and advice so that:**
 - 2a. information sources that will provide the information required by customers are selected and used
 - 2b. customers receive relevant, complete, accurate and up to date information and advice
 - 2c. customers understand the information and advice given to them when relevant, restrictions attached to products and services are clearly explained
 - 2d. customers are offered information and advice on a range of alternatives where a number of different products and services meet their needs
 - 2e. time is allocated to balance the needs of the individual, other customers and the organisation.

Behaviours which underpin effective performance

- Greet customers politely and confidently
- Find out your customers' needs fully and accurately by the use of clear questioning and listening techniques
- Ask customers about any needs of which you are uncertain
- Communicate information and advice in a way which your customers will understand
- Check politely that the information and advice given meets your customers' needs
- Find alternative ways to help your customers further, when the information you give does not meet their expectations

Scope

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

- **Information sources:** organisation-specific reference materials, electronic sources, brochures, directories, timetables, maps, guidebooks, external organisations, other colleagues, leaflets, databases, web-based

Knowledge and understanding**General knowledge and understanding**

You must know:

- how to access and use the sources of information
- how to extract and present information to customers
- how to identify and interpret customers' needs
- how to deal with dissatisfied customers
- how to balance and acknowledge the needs of customers so they are not ignored
- your main responsibilities for giving information and advice under current network minimum standards
- how to use varied vocabulary and expressions to suit your purpose
- how to adapt what and how much you say to suit different situations
- how to show you are listening closely and respond appropriately (e.g. by using verbal and or visual signals)
- how to identify your customers' intentions
- how to move a discussion forward
- how to adapt your language to suit your subject, purpose and the person you are speaking to
- how to structure what you say to help customers follow a line of thought or number of points clearly
- how to use verbal or visual illustrations to help your customers understand any points you are making

You must understand:

- why it is essential to clarify the detail of customers' needs
- why it is important to be helpful and polite
- why it is important to monitor customers' behaviour so that you can tell if any are feeling dissatisfied
- why it is important to check that your customers are satisfied
- the need for confidentiality and the implications of data protection legislation
- the relevant parts of the disability discrimination legislation and its implications when giving advice and information to customers

Industry-specific knowledge and understanding

You must know:

- what type of information and sources are available and how to access them
- other external organisations that can be contacted for additional and specialist tourist information and how to contact them
- your organisation's and any legal requirements for advising customers (e.g. retail-related requirements and booking conditions)

You must understand:

- the consequences of misrepresentation (e.g. in the context of brochure amendments and or updates) during discussions with customers

Context-specific knowledge and understanding

You must know:

- those colleagues having specialist knowledge
- the range of enquiries you may be called upon to handle
- how and where your organisation stores information

You must understand:

- your organisation's policies for meeting customers' needs for information, advice and materials

Unit 510

Identify and provide tourism-related information and advice (TT14)

Evidence requirements

Unit	TT14 Identify and provide tourism-related information and advice
ELEMENT	Identify customers' needs for information
What you must DO	The assessor may assess 1a-1b through questioning, witness testimony or other documentary evidence demonstrating competence.
ELEMENT	Source and provide information and advice
What you must DO	The assessor may assess 2a-2e through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">• at least five from information sources<ul style="list-style-type: none">a) organisation specific reference materialsb) electronic sourcesc) brochuresd) directoriese) timetablesf) mapsg) guidebooksh) external organisationsi) other colleaguesj) leafletsk) databasesl) web-based

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

Level: 5

Credit value: 6

What is the unit about?

With the increasing demand by customers for choice and personalised travel arrangements, whether on business or for leisure travel, opportunities are growing for agencies to tailor components to suit individual needs. Whilst customers may be able to purchase individual travel products for themselves (often online) it is often better to use the services of an experienced agent to select components from a variety of suppliers and arrange them into a well- planned package. An important part of that process which offers real value for customers is the preparation of an itinerary for travellers, time- tabling and describing each stage.

Who is the unit for?

The unit is recommended for those involved in preparing itineraries for customers requiring tailor- made travel and tourism packages.

Outcomes of effective performance

You must be able to:

- 1. Arrange travel itineraries, so that:**
 - 1a. customer contact is established and maintained
 - 1b. customers' wants, needs and preferences are established
 - 1c. relevant customer information is recorded quickly, accurately, in the required format and complies with operational, organisational and legal requirements
 - 1d. components from a range of suitable suppliers are identified
 - 1e. customers are aware of a range of suitable components and arrangements
 - 1f. realistic itineraries are drafted based on all available information
 - 1g. suggested itineraries and prices are presented clearly and accurately for customer consideration
 - 1h. price, availability and detail of final agreed itinerary are confirmed with the customers to close the sale
 - 1i. details of the arrangements are processed and stored according to approved procedures

Behaviours which underpin effective performance

- Demonstrate a clear understanding of different customers and their real and perceived needs
- Establish communication and productive relationships with customers
- Promote a positive image of yourself and your company to the customers
- Use knowledge and awareness of travel geography and component types to establish the confidence of customers
- Establish and maintain good relationships with suppliers of travel and tourism components
- Use cost effective, time-efficient means to gather information on components of the proposed itinerary from printed, electronic and on-line sources
- Gather, record and update information effectively
- Monitor the validity and reliability of information to feed into customers' profiles
- Seek advice and information from colleagues as necessary
- Reflect regularly on your own and others' experiences and use these to inform future action

Scope

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

- **Customer contact:** face-to-face, telephone and electronic (email or chat)
- **Customers' wants, needs and preferences:** timing, travel, accommodation; additional services
- **Recorded:** manually, electronically
- **Customer information:** customers' contact details, product enquiries, relevant interests
- **Components:** travel, transfer, accommodation; from a single supplier, from multiple suppliers
- **Processed and stored:** manually, electronically

Knowledge and understanding**General knowledge and understanding**

You must know:

- a variety of means of communicating with customers to establish their needs and wants
- the key features of a positive relationship with customers and the factors which affect it

You must understand:

- why it is necessary to adjust means of communication with customers to match their needs and preferences

Industry-specific knowledge and understanding

You must know:

- suitable travel geography to meet customers' needs and inspire confidence
- current rules and regulations governing the sale of separate travel components, and what constitutes a package
- the characteristics of a successful travel itinerary
- how to identify suitable suppliers of travel and tourism products to suit different customers' needs

You must understand:

- the benefits and limitations of different itinerary formats

Context-specific knowledge and understanding

You must know:

- procedures used to check availability and price of components
- organisational requirements for collecting, recording and storing customers' information
- sources of expert advice within the organisation

Unit 511 Arrange travel itineraries (TT20)

Evidence requirements

Unit	TT20 Arrange travel itineraries
ELEMENT	Arrange travel itineraries
What you must DO	The assessor may assess 1a-1i through questioning, witness testimony or other documentary evidence demonstrating competence.
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">• at least one from customer contact<ul style="list-style-type: none">a) face-to-faceb) telephone and electronic (email or chat) • at least one from customers' wants needs and preferences<ul style="list-style-type: none">a) timingb) travelc) accommodationd) additional services • at least two from customer information<ul style="list-style-type: none">a) customers' contact detailsb) product enquiriesc) relevant interests • at least one from recorded<ul style="list-style-type: none">a) manuallyb) electronically • at least three from components<ul style="list-style-type: none">a) travelb) transferc) accommodationd) from a single suppliere) from multiple suppliers • at least one from process and store<ul style="list-style-type: none">a) manuallyb) electronically

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

Specific evidence requirement

Simulation is not allowed for any performance evidence within this unit.

Unit 522

Build and maintain face-to-face relationships with customers (TT49)

Level: 5

Credit value: 4

What is the unit about?

This unit describes the essential competence of greeting and developing positive relationships with customers in our intensely people-oriented industry. This unit is specifically concerned with face-to-face relationships. A separate unit complements this with 'Building and maintaining relationships with customers not present'. This covers telephone, email, video and VOIP, text message and live chat forms of contact, that are either already being used or are likely to make their presence felt in the future.

Who is the unit for?

The unit is recommended for anyone in face-to-face contact with customers.

Outcomes of effective performance

You must be able to:

Greet customers, so that:

- 1a. customers are acknowledged and greeted promptly in accordance with company policies
- 1b. customers' needs and wants are established quickly and sensitively
- 1c. where necessary, customers are promptly referred to more appropriate members of staff and the reasons for referral explained.
- 1d. necessary confidentiality is maintained
- 1e. where delay in greeting is unavoidable, customers are acknowledged, and where possible, apologies are given

Establish rapport with customers, so that:

- 1f. customers' confidence in your professionalism is established
- 1g. appropriate language and gestures are used to suit the needs of customers
- 1h. spoken communication is clear and pitched suitably for customers
- 1i. customers feel at ease

Maintain and build established relationships with customers, so that:

- 1j. returning customers are greeted by name where appropriate
- 1k. customers' needs are established, confirmed and appropriate action taken
- 1l. appropriate opportunities are taken to confirm mutual understanding of customers' needs and potential means of meeting them
- 1m. any delay in responding to customers' needs is explained so as to maintain goodwill
- 1n. any undertakings made to customers are carried out within the promised time
- 1o. customer records are updated accurately and promptly

Behaviours which underpin effective performance

- Read people and situations and react to them appropriately
- Gain trust and build rapport
- Deliver the best customer service possible to a range of customer types

Scope

The items below define the context and scope of your performance:

- **Greeted:** in person
- **Confidentiality:** of organisation information, of customer information
- **Pitched:** vocabulary used, speed of speech, use of technical language

Knowledge and understanding

General knowledge and understanding

You must know:

- the language to use when speaking to customers
- how to greet people formally and informally
- how to treat guest as individuals
- how to relate information to customers

You must understand:

- the importance of listening and building rapport
- the importance of following up calls/meetings
- different cultures and backgrounds
- the effect of body language
- the importance of equality when serving people with specific needs
- the importance of complying with equality requirements

Context-specific knowledge and understanding

You must know:

- the organisation's policies on face-to-face greeting and communicating with customers.
- the organisation's requirements concerning customer records

Unit 522

Build and maintain face-to-face relationships with customers (TT49)

Evidence requirements

Unit	TT49 Build and maintain face-to-face relationships with customers
ELEMENT	Greet customers face to face
What you must DO	The assessor must assess 1a-1e by directly observing the candidate's work.
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">a) at least one from greet<ul style="list-style-type: none">a) in personb) both from confidentiality<ul style="list-style-type: none">a) of organisation informationb) of customer information <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>
ELEMENT	Establish rapport with customers
What you must DO	<p>The assessor must assess 1g & 1h by directly observing the candidate's work.</p> <p>The assessor may assess 1f & 1i through questioning, witness testimony or other documentary evidence demonstrating competence.</p>
What you must COVER	<p>There must be performance evidence, gathered through observing the candidate's work for:</p> <ul style="list-style-type: none">c) at least two from pitch<ul style="list-style-type: none">a) vocabulary usedb) speed of speechc) use of technical language <p>Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.</p>

ELEMENT**Maintain and build established relationships with customers**

What you must DO

The assessor must assess 1k-1o by directly observing the candidate's work.

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

Level: 5

Credit value: 6

What is the unit about?

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

Who is the unit for?

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

Outcomes of effective performance

You must be able to:

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

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

Behaviours which underpin effective performance

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

Scope

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

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

Knowledge and understanding**General knowledge and understanding**

You must know:

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

Industry-specific knowledge and understanding

You must know:

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

You must understand:

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

Context-specific knowledge and understanding

You must know:

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

You must understand:

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

Unit 604 Complete foreign exchange transactions (TT17)

Evidence requirements

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

Level: 6

Credit value: 4

What is the unit about?

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

Who is the unit for?

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

Outcomes of effective performance

You must be able to:

1. Obtain customer feedback, so that:

- 1a. customer feedback information obtained is suitable for subsequent analysis
- 1b. customers' goodwill is maintained throughout the collection process
- 1c. the collection process does not damage the reputation of the company
- 1d. information is recorded accurately
- 1e. the confidentiality of customer information and feedback is maintained
- 1f. information is stored according to organisation requirements

2. Analyse customer feedback, so that:

- 2a. information selected for analysis is suited to the purpose of the evaluation
- 2b. information for analysis is extracted and synthesised accurately
- 2c. the results of analysis reflect customer feedback
- 2d. the results of the analysis meet evaluation criteria; are presented clearly and on time
- 2e. gaps and deficiencies in the data for analysis are identified and, where possible, rectified
- 2f. the accuracy of analysis is enhanced as necessary, by seeking further assistance from others

Behaviours which underpin effective performance

- Establish and maintain productive relationship with customers providing feedback

Scope

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

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

Knowledge and understanding**General knowledge and understanding**

You must know:

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

You must understand:

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

Industry-specific knowledge and understanding

You must know:

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

Context-specific knowledge and understanding

You must know:

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

Unit 605 Obtain and analyse customer feedback (TT23)

Evidence requirements

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

Level: 6

Credit value: 4

What is the unit about?

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

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

Who is the unit for?

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

Outcomes of effective performance

You must be able to:

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

Scope

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

Knowledge and understanding

You need to know and understand:

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

Appendix 1 Relationships to other qualifications

Links to other qualifications and frameworks

City & Guilds has identified the connections to previous qualifications. This mapping is provided as guidance and suggests areas of overlap and commonality between the qualifications. It does not imply that candidates completing units in one qualification are automatically covering all of the content of the qualifications listed in the mapping.

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications. For example, units within a QCF qualification may be similar in content to units in the NQF qualification which the candidate may have already undertaken and this may present opportunities for APL.

This qualification has connections to the:

- Level 2 NVQ in Travel and Tourism Services (4847)

NQF NVQ units		SVQ units	
Unit Number/Title		Unit Number/Title	
Unit 201	(T6) Give customers a positive impression of yourself and your organisation – (ICS Unit 1, Level 2)	Unit 501	Give customers a positive impression of yourself and your organisation
Unit 202	(T7) Ensure your own actions reduce risks to health and safety – (ENTO Unit A)	Unit 502	Make sure your own actions reduce risks to health and safety
Unit 203	(T10) Develop and maintain your effectiveness at work – (HABIA Unit G8, Level 2)	Unit 503	Develop and maintain your effectiveness at work
Unit 204	(T19) Help customers to choose and book travel services	Unit 505	Help customers to choose and book travel services
Unit 205	(T11) Arrange non-multi-sector air travel	Unit 504	Arrange non-multi-sector air travel
Unit 206	(T3) Process travel and tourism services payments	Unit 506	Process travel and tourism services payments
Unit 207	(T4) Assist customers prior to and after travelling	Unit 507	Assist customers prior to and after travelling
Unit 210	(T14) Identify and provide tourism related information and advice	Unit 510	Identify and provide tourism-related information and advice
		Unit 509	Research travel and destination information
		Unit 511	Arrange travel itineraries

Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Providing City & Guilds qualifications – a guide to centre and qualification approval contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- ***Walled Garden***
Find out how to register and certificate candidates on line
- ***Qualifications and Credit Framework (QCF)***
Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- ***Events***
Contains dates and information on the latest Centre events
- ***Online assessment***
Contains information on how to register for GOLLA assessments.

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Useful contacts

Type	Contact	Query
UK learners	T: +44 0844 543 0000 E: learnersupport@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com	<ul style="list-style-type: none"> • General qualification information
Centres	T: +44 (0)20 7294 2787 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Registrations/enrolment • Certificates • Invoices • Missing or late exam materials • Nominal roll reports • Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	<ul style="list-style-type: none"> • Exam entries • Results • Certification • Missing or late exam materials • Incorrect exam papers • Forms request (BB, results entry) • Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	<ul style="list-style-type: none"> • Results • Entries • Enrolments • Invoices • Missing or late exam materials • Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	<ul style="list-style-type: none"> • Re-issue of password or username • Technical problems • Entries • Results • GOLLA • Navigation • User/menu option problems
Employer	T: +44 (0)121 503 8993 E: business_unit@cityandguilds.com	<ul style="list-style-type: none"> • Employer solutions • Mapping • Accreditation • Development Skills • Consultancy
Publications	T: +44 (0)20 7294 2850 F: +44 (0)20 7294 3387	<ul style="list-style-type: none"> • Logbooks • Centre documents • Forms • Free literature

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: feedbackandcomplaints@cityandguilds.com

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