Occupation Profile

Providing Travel Services
Modern Apprenticeship at
SCQF Level 6

Approved by: Travel Services Technical Expert Group

Approved date: August 2023

Purpose:

This occupation profile consists of 22 work situations and NOS routinely carried out in customer service roles. This provides all the performance requirements and knowledge and understanding requirements apprentices need to demonstrate competence in the occupation.

Meta-skills

Meta-skills sit alongside and complement technical knowledge, skills and behaviours. As technology, society and the way we work change at an ever-increasing pace, meta-skills are the over-arching and future-focused attributes that enable other skills to be developed through consideration, reflection and implementation.

Meta-skills support improved performance and productivity, greater adaptability and resilience to change. For apprentices, meta-skills are a critical asset, supporting their ability to cope and excel in the face of change, to solve problems, to collaborate with others and to create successful futures. There are three categories, each with four meta-skills.

Managing yourself - focus, integrity, adaptability and initiative

Connecting with others - communication, feeling, collaboration and leadership

Interacting with change - curiosity, creativity, sense-making and critical thinking

Developing meta-skills in Customer Service, Retail and Travel Apprenticeships

Supported by their employer, mentor and learning provider, apprentices should consider, practice and reflect on their use of meta-skills during their apprenticeship, building those skills to enhance their personal effectiveness in their present role and their future careers.

Here are some examples of when an apprentice might use Meta-skills:

Managing yourself

A clear **focus** is required when dealing with a complex problem relating to a customer booking; **integrity** is essential when providing honest and constructive feedback to colleagues; **adaptability** is key to dealing with changes and unexpected or challenging situations arising from customer complaints; and using **initiative** is critical to professional development when seeking to improve and gain new skills.

Connecting with others

Clear and effective **communication** with customers is one of the most significant aspects of roles across these apprenticeships; **feeling** and resilience is needed to show empathy and understanding when dealing with colleagues; skills in **collaboration** are vital to career development as working well as part of a team or business can help to improve individual and collective performance; and strong **leadership** qualities are required to give colleagues clear directions when working in a business environment.

Interacting with change

A keen sense of **curiosity** is a critical asset when asking questions about a new system or technique; **creativity** is fundamental to working with customers as it enables alternatives or solutions to be found; **sense-making** comes into play when helping a colleague to use a new or unfamiliar payment or information management system; and **critical thinking** is required to solve unexpected problems in the working environment.

Mandatory work situations

Sell travel-related products and services
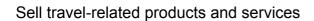

Overview

This standard is about selling business and / or leisure travel-related products and services. This involves identifying customers' needs, promoting the features and benefits of relevant products and services and identifying opportunities for maximising sales, as well as effectively closing the sale. This standard is for all staff in contact with customers and responsible for ensuring that customers' needs are met in line with available products or services.

When you have completed this standard, you will be able to demonstrate your knowledge of and ability to:

• Sell travel-related products and services

Sell travel-related products and services

Performance criteria

You must be able to:

1. Identify and offer travel-related products and services that best match the customer's needs in line with organisational procedures
2. Identify any additional customer requirements
3. Provide customers with responses to queries, and solutions to issues if necessary
4. Communicate to the customer information on travel-related products and services, costs, legal requirements that best match the customer's needs in line with organisational procedures
5. Explain the features and benefits of travel-related products and services that match customer's needs and provide opportunities for customers to discuss and explore them
6. Identify opportunities to upsell or sell additional travel-related products and services to meet customer needs and expectations and maximise revenue through business incentives and sales campaigns
7. Maximise opportunities to enhance customer experience throughout the selling process
8. Respond to any concerns customers may have with the travel-related products or services being sold in line with organisational procedures
9. Sell travel-related products and services that match customer needs and are in line with organisational policies
10. Calculate the total cost of the travel-related products and services selected and present them to customers
11. Explain to customers relevant terms, conditions and legal requirements relating to the sale
12. Confirm customer's understanding of the travel-related products or services being sold
13. Confirm customers' intention to buy travel-related products and services
14. 14. Record, process and store customer information in accordance with the organisation's procedures and current legal requirements

Sell travel-related products and services

Knowledge and understanding

You need to know and understand:

1. How to use questioning techniques and listening skills to identify customer needs for travel-related products and services
2. Your organisation's procedures relating to the sale of travel-related products and services and the importance of following them
3. Your organisation's preferred suppliers
4. Where to find information on the travel-related products and services and additional travel-related products and services offered by your organisation
5. The key features and benefits of travel-related products and services and additional travel-related products and services offered by your organisation
6. The key features of UK, global and specialist destinations
7. How to use different types of selling techniques
8. How to communicate effectively with customers in different sales situations
9. How a range of travel and additional travel-related products and services can be combined to match the needs of customers, and what constitutes a 'package'
10. How your organisation maximises revenue through business incentives and sales promotions
11. How to identify opportunities for enhancing the customer experience
12. The specific terminology, codes, legislation and regulations which are relevant to the range of travel-related products and services offered by your organisation
13. Where to find information on relevant travel-related health and security precautions and what information to give customers
14. How to use and interpret websites, brochures and timetables to provide information and costings
15. The characteristics and selling points of different booking options offered by your organisation
16. How to identify and interpret booking conditions and specific restrictions relating to the travel-related products and services offered by your organisation
17. How to accurately cost travel, accommodation and additional travel-related products and services, and the importance of doing so
18. Your organisation's procedures for presenting costs and information on booking conditions to customers
19. How to influence customers' decisions and overcome objections
20. The importance of providing accurate and up to date information to customers, and the consequences of misrepresentation
21. The value of Air Travel Organisers' Licensing (ATOL) and the protection

ATOL offers customers
22. The role and importance of the Civil Aviation Authority (CAA), European Aviation Safety Agency (EASA), International Air Transport Association (IATA), Association of Train Operating Companies (ATOC) and ABTA
23. The importance of maintaining customer confidentiality and the implications of current data protection legislation
24. The relevant legislation when dealing with or advising customers
25. The contractual responsibilities of the lead passenger
26. The relevant trade codes of practice when selling leisure or business travel
27. The Data protection, legal requirements for recording storing and protection of customer details

Sell travel-related products and services

Scope/range

Travel-related products and services includes:
a) Package holidays
b) Travel e.g. air, coach, bus, rail, tram, ferry, cruise
c) Accommodation e.g. hotels, self-catering, guesthouses, cruise and B&Bs, caravan, camp sites and holiday centres
d) Accommodation services e.g. room types, cabin types, facilities and meal basis
e) Sustainable options
f) Accessible options

Additional customer requirements include:
a) Dietary
b) Health
c) Mobility impairment
d) Visual impairment
e) Hearing impairment
f) Speech impediment
g) Learning difficulties
h) Travelling with assistance animals
i) Pregnant
j) Travelling with pushchairs

Key features of UK destinations:
a) The names and locations of UK towns and cities
b) The names and locations of gateway airports, railway stations and seaports
c) Climate and physical features
d) The names and locations of tourist attractions
e) The names, location and timing of special events e.g. festivals, sporting
f) The names and location of resorts
g) The names and location of national parks

Key features of global destinations include:
a) The names and location of continents, countries, oceans and seas
b) The location of capital and other major cities and transport hubs
c) The location of major resorts, tourist attractions and special events
d) Types of accommodation available and grading schemes
e) The different time zones
f) Climate
g) Main physical features
h) Currencies

i) Languages
j) Local cultures and customs
k) Passport, visa and other entry requirements

Specialist destinations include:
a) Adventure, activity and extreme sport holidays
b) Health and wellness
c) Experiential tourism
d) Eco-tourism
e) Food tourism
f) Music tourism
g) Community-based tourism
h) Sporting events
i) Festivals and other special events
j) Historical, cultural, genealogical and architectural interest
k) Business centres and conference destinations

Selling techniques include:
a) Establishing rapport
b) Investigating needs
c) Matching up needs and wants
d) Presenting features and benefits
e) Offering alternatives
f) Upselling
g) Gaining commitment and closing the sale

Additional travel-related products and services include:
a) Airport services and facilities
b) Car hire / rental
c) VIP / Business lounges
d) Car parking
e) Transport to and from departure point
f) Private transfer
g) Chauffeur services
h) Other transport
i) Accommodation
j) Free all inclusive
k) Butler services
l) Upgrades e.g. cabin, drinks, meal
m) Airline extras
n) Meetings, incentives, conferences and exhibitions (MICE)
o) Events

p) Passports
q) Visas
r) Insurance
s) Foreign exchange
t) Pre-bookable excursions and tickets
u) Tour operators' extras
v) Ski packs
w) Sporting packages

Sell travel-related products and services

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT01
Relevant Occupations	Leisure and Travel Service Occupations; Personal Service Occupations; Senior Travel Adviser; Senior Customer Service Adviser
Suite	Travel and Tourism
Keywords	Sell, travel-related, products,services

Provide customer centric service

Overview

This standard is part of the customer service competence area related to Impression and Image. It covers providing customer-centric service. It includes area that covers the customer service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You often deal with many customers who seem to be the same, but recognise that each customer is an individual. You make each customer feel that they have had your complete attention and have been dealt with personally to increase their sense of satisfaction. When your customer feels that you have taken special care to give them good service and have done something more than they expect, they are likely to enjoy a better customer service experience. Opportunities to add this extra value to your customer's experience depend on you spotting what they will particularly appreciate. Often you can offer this little extra when sorting out a difficulty or problem. Whatever special service you give when you "go the extra mile" must be within your own authority or with the authority of an senior colleague. You must also take account of the organisation's procedures and regulations. When you work with customers you make them feel that you care what happens to them and that you respect them as individuals.

This standard is for customer service professionals who provide customer centric service.

Provide customer centric service

Performance criteria

You must be able to:

1. identify when you can add a personal touch to your customer service within your organisation's systems or procedures
2. observe and listen to your customers for signs that will help you personalise their service
3. confirm that you understand customer needs and are there to help them
4. identify opportunities to help or direct your customer outside of your routines and procedures
5. identify customers with individual needs who would appreciate a more personalised service
6. balance the time you take to give individual attention to one customer with the needs and expectations of other customers
7. communicate with customers following organisational guidelines to show respect for them as individuals
8. focus your attention on the customers you are dealing with
9. follow your organisation's guidelines for giving your customer your own name and contact details
10. build a 'one to one' relationship with your customer using organisational guidelines
11. treat customers as individuals recognising that each customer is unique
12. demonstrate respect to customers and colleagues at all times and avoid over-familiarity
13. explain your organisation's products and services
14. identify your customers' expectations and needs
15. match products and services with customers' expectations and needs
16. identify other actions that could give added value to your customer service and choose those that will impress your customers
17. check that added value actions fit within your organisation's guidelines and external regulations
18. explain your actions for added value service to a senior colleague for their authorisation when required
19. implement agreed actions to add value in customer service
20. communicate the added value of your actions with customers
21. monitor the effects of your added value actions to check that other customers are unaffected
22. monitor feedback from your customers about the impact of your actions
23. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. the principles of customer centric service and the activities relating to it
2. when and how to use your customer's name, your name and contact details following organisational guidelines
3. the different personalities that customers have and their receptiveness to personalised services
4. the types of personal information about customers kept on record
5. the types and features of customer service you can offer to customers with individual needs
6. how to use open body language and approaches to communication that align with your organisation's culture, values and requirements
7. your organisation's guidelines on actions that are permissible outside of the normal routines and procedures
8. your own preferences and comfort levels relating to how you are willing and able to provide customer-centric service
9. the boundaries beyond which customer service may perceived as inappropriate by your organisation
10. how to identify the unique requirements that individual customers have
11. the importance of adapting approaches to customer service delivery to show respect to customers and colleagues and the potential consequences of over-familiarity
12. how to gain information about a customer's preferences, including through social media
13. your organisation's services and products and how to match these to customer needs and expectations
14. how to evaluate customers' expectations of the service they will receive
15. that types of service actions that customers see as adding value to customer service
16. your organisation's rules and procedures that determine your authority to 'go the extra mile'
17. how your organisation receives customer service feedback about their customer experience
18. your organisation's procedures for making changes in its services and products
19. how to monitor feedback from customers and colleagues about actions taken to exceed customer expectations
20. how to recognise when added value actions become routine and should be accommodated within the standard services and products
21. the legal, organisational, codes of practice and policies relevant to

your role and the activities being carried out

Provide customer centric service

Developed by	Skills CFA
Version Number	1
Date Approved	22 Feb 2021
Indicative Review Date	01 Mar 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFACSA8, CFACSA9
Relevant Occupations	Customer Service Occupations
Suite	Customer Service
Keywords	Communicating; giving respect; personal touch; customer service; communication; problem solving; behaviours; work with others; team working; balancing time; relationship building; feelings; adding value; appreciation

Work Situation

Monitoring health, safety and security

Goal of work situation:
To monitor health, safety and security in line with legislative and organisation procedures to protect yourself and others from the risk of harm and injury.

Brief outline:
This is about monitoring the health, safety and security of yourself and others who may be affected by your work. This involves co-operating with your employer to help them to comply with their duties under relevant health and safety legislation. It includes following set health and safety procedures and identifying and assessing unsafe situations in the workplace or during work activities. It also includes being aware of the main risks to health, safety and security in the workplace and suitable control measures or safe systems of work that can be put in place. In the event of incidents and emergencies required procedures must be followed.

Security could include land, buildings, equipment and machinery, stock, resources, personnel and information.

Performance requirements
1. Monitoring that health, safety and security hazards are identified and risks assessed in your area of work in line with organisation procedures
2. Taking required actions in response to identified hazards and risks in line with organisation procedures
3. Checking that control measures put in place to eliminate or reduce risks in own area of work are adhered to in line with organisation procedures
4. Informing others in your work area of the risks and the control measures that have been put in place in line with organisation procedures
5. Monitoring that health and safety regulations, organisation procedures and safe systems of work are followed in own area of work
6. Checking that security is maintained in own area of work in line with organisation requirements
7. Checking that equipment and machinery is used, maintained and stored in accordance with relevant legislation, manufacturers' instructions and organisation requirements

Knowledge and understanding requirements
1. Health and safety legislation and codes of practice, the legal responsibilities ofemployers and employees and the importance of monitoring these
2. The importance of following health and safety regulations, organisation procedures and safe systems of work
3. The difference between "hazard" and "risk", how to identify hazards and assess risks
4. The importance of regular risk assessment and what actions to take when risks are identified
5. Particular risks associated with your area of work including personal injury, contracting disease, and other physical and mental health problems
6. Effects that work-related accidents and ill health can have on workers and businesses and the importance of minimising these
7. The risks to others from the activities carried out in own area of work
8. How to communicate the findings of the risk assessment and health, safety and security measures to those at risk

8. Reporting and recording incidents and emergencies, including accidents and near misses, in accordance with legal and organisation requirements
9. Monitoring and reporting on the effectiveness of health, safety and security measures in line with organisation requirements

9. The hierarchy of measures to control risks including elimination, substitution, relevant controls, safe systems of work, training/instruction and PPE
10. The importance of good housekeeping in the workplace to maintaining health and safety
11. The importance of monitoring procedures to maintain security in own area of work
12. Key requirements of the regulations relating to the handling, use and storage of potentially hazardous substances
13. The safe methods of preparing, using, maintaining and storing equipment and machinery in accordance with relevant legislation, manufacturers' instructions and organisation requirements
14. Risks of injury associated with lifting and handling and how these can be minimised
15. The suitable clothing and personal protective equipment (PPE) required for work in your industry
16. The importance of regularly checking that PPE and emergency equipment is available and maintained
17. Risks of working in isolation, in remote locations and potentially dangerous situations, and the need to monitor that safe systems of work are followed, including communication and emergency procedures
18. The procedures to follow and actions to take in the event of incidents and emergencies including accidents and near misses
19. Where to obtain information, advice and support in relation to health, safety and security
20. Legislative and organisation requirements for recording and reporting incidents and emergencies, including accidents and near misses
21. Organisation requirements to monitor and report on the effectiveness of health, safety and security measures

Work Situation

Developing meta-skills and personal practice

Goal of work situation:
To develop meta-skills and personal practice through self-evaluation, agreeing objectives, reflecting on practice, and actively learning to improve own performance in line with organisational requirements.

Brief outline:
This is about developing meta-skills and personal practice. This involves reflecting on and learning from practice; acting on feedback; agreeing and working towards own objectives for continuous personal and professional development. Individuals will be supported in their development, usually by their line manager.

Performance requirements
1. Identifying meta-skills and role specific skills regularly used in own work to assess strengths and improvement needs for personal and professional development
2. Discussing and agreeing SMART objectives for personal and professional development and to achieve business objectives
3. Discussing and agreeing appropriate development activities to improve own performance and to achieve business objectives
4. Completing development activities within agreed timescales to support and progress own performance
5. Acting on feedback to improve own performance and development
6. Reflecting on performance, meta-skills and specific skills developed in your role to identify and agree future development needs
7. Completing mandatory training in line with organisational requirements
8. Completing documentation required for personal and professional development in line with organisation policy and procedures

Knowledge and understanding requirements
1. The purpose and importance of meta-skills including their definitions and how they relate to own work
2. The importance of personal and professional development within own organisation and role
3. How to use reflective practice to identify gaps in role specific knowledge, skills and meta-skills
4. How to participate effectively in performance reviews
5. How to discuss and agree SMART objectives – Specific, Measurable, Achievable, Realistic, Time-bound
6. The importance of business and personal objectives in own development
7. Sources of up-to-date and appropriate information to support own development
8. The importance of maintaining well-being in own role and where to get support
9. How to use feedback to develop own skills and knowledge
10. Different learning models and styles and how to use these for own development

Optional work situations

A minimum of **four** optional work situations/NOS must be achieved

Advise customers on the implications of information which impacts on their travel arrangements

Overview

This standard is about advising customers on the implications of information which impacts on their travel arrangements. This involves monitoring information provided internally by your organisation from external sources such as Government Agencies and ABTA, checking the implications of the information received, and identifying those customers whose travel arrangements are likely to be affected by it. This also involves communicating the relevant information to customers in a which helps them make informed decisions about their travel arrangements.

This standard is for travel consultants and travel agents for both leisure and business / corporate travel.

When you have completed this standard, you will have demonstrated your understanding of and your ability to:
• Advise customers on the implications of information which impacts on their travel arrangements

Advise customers on the implications of information which impacts on their travel arrangements

Performance criteria

You must be able to:

1. Monitor the internal information received in line with organisational procedures
2. Check your understanding of the potential impact of information on customers' travel arrangements with the person who is providing the internal information
3. Identify and prioritise actions according to the potential impact of the information on customers
4. Contact your customers in line with organisational procedures and the required timescales
5. Communicate the information and advice to customers in a way they can understand and which will support their decision making
6. Confirm the customers have understood the information and advice given and the implications for their travel arrangements, including any associated risks
7. If necessary, identify alternative travel arrangements in line with organisational procedures
8. Implement actions to support customers' alternative travel arrangements

Advise customers on the implications of information which impacts on their travel arrangements

Knowledge and understanding

You need to know and understand:

1. Your organisation's procedures for monitoring internal information
2. The importance of checking your understanding of the implications of the information on customers' travel arrangements with the person who is providing the internal information
3. How to identify and prioritise customers who are affected by the information received
4. Your organisation's procedures and timescales for contacting affected customers, and the importance of following them
5. The actions to take if customers do not respond to attempts to contact them
6. How to communicate information to customers in a way they will understand and support their decision making
7. How to communicate in a way relevant to the impact of the information given
8. How to confirm that customers have understood the impact of the information given to them on their travel arrangements, including associated risks
9. How to identify alternative travel arrangements for customers and arrange them as necessary

Advise customers on the implications of information which impacts on
their travel arrangements

Scope/range

Risks include:

1. Health e.g. food poisoning outbreaks, viral outbreaks, pandemics
2. Safety e.g. physical, well-being, natural disasters
3. Security e.g. crime rate, terrorist attacks
4. Financial e.g. airline goes out of business
5. Cultural e.g. diversity, local customs
6. Entry requirements e.g. visa requirements, travel documents, passport
7. Political e.g. unstable government, border access / controls

Advise customers on the implications of information which impacts on their travel arrangements

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT55
Relevant Occupations	Business Travel Consultant; Leisure and Travel Service Occupations; Leisure Travel Consultant; Local Tour Guide; Overseas Resort Representative; Personal Service Occupations; Tourism Assistant; Tourism Information Officer
Suite	Travel and Tourism
Keywords	research, travel, destination, information

CFACSD5
Buddy a colleague to develop their customer service skills

Overview

This Standard is part of the Customer Service Theme of Development and Improvement.   This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

In customer service roles it is often useful to have a 'buddy' relationship with somebody who has more experience of the same customer service situation. If you are asked to buddy a colleague who is learning customer service aspects of their job, you need to approach that responsibility in an organised way. This Standard is about how to be a good buddy by working alongside your colleague and providing them with constructive feedback and support. You do not need to be more senior than your colleague or their supervisor to act as a customer service buddy.

CFACSD5
Buddy a colleague to develop their customer service skills

Performance criteria	**Plan and prepare to buddy a colleague**

You must be able to:

P1   agree with your colleague aspects of their work which may benefit most from your buddying support

P2   your understanding of your colleague's job tasks and responsibilities using reliable sources

P3   clarify the customer service image and impression your colleague should present in their job

P4   arrange times when it will be most helpful to work alongside your colleague

P5   plan details of a buddy session to support your colleague on the job

Support your buddy colleague on the job

You must be able to:

P6   agree with your colleague where you will be placed near them when buddying them on the job

P7   ensure your presence when your buddy is dealing with customers does not detract from effective customer service

P8   carry out customer service tasks in the presence of your buddy colleague to set an example they can follow

P9   observe your colleague closely to identify what they do well and areas in which they could improve

P10   discuss each customer transaction briefly when there is time available between dealing with customers to identify approaches that work well and areas for improvement

P11   praise your colleague on aspects of their work which they have carried out well

P12   explain to your colleague ways in which they can improve their customer service performance

P13   make notes on your colleague's strengths and areas for development that you can discuss with them

Provide buddy support off the job

You must be able to:

P14   arrange suitable times to meet with your buddy colleague when they are not directly engaged with customers

P15   identify areas of general interest that help to establish rapport with your buddy colleague

P16   use notes made when observing your colleague to discuss positive and negative aspects of their performance

P17   agree actions your buddy colleague can take to improve their customer service performance

P18   offer hints and tips on effective customer service actions to your buddy colleague drawn from your own experience

CFACSD5

Buddy a colleague to develop their customer service skills

Knowledge and understanding

You need to know and understand:

K1   the tasks in your buddy colleague's job

K2   areas of the job that benefit most from buddying support

K3   the customer service image and impression that should be presented in your buddy colleague's job

K4   the best times at which to work alongside your buddy colleague

K5   ways to work alongside your buddy colleague without intruding on the customer relationship

K6   techniques for giving positive feedback and constructive criticism to your buddy colleague

K7   the importance of establishing an effective rapport with your buddy colleague

K8   options for actions your buddy colleague can take to improve their customer service performance

CFACSD5

Buddy a colleague to develop their customer service skills

Developed by	Skills CFA
Version number	2
Date approved	January 2013
Indicative review date	January 2016
Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSD5
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Buddying; colleagues; develop skills; relationships; learning; working together; constructive feedback; customer service; contact centres; improve; develop; communication; problem solving; behaviours; work with others; teamwork; giving information

Collect and analyse customer feedback

Overview	Customer feedback is critical to business success. In all service industries organisations 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 resolve any problems that can be put right and positive feedback used to enhance the organisations reputation.
	The standard is 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.
	When you have completed this standard, you will be able to demonstrate your knowledge of and ability to: • Collect and analyse customer feedback

Collect and analyse customer feedback

Performance criteria

You must be able to:

1. Collect customer feedback information
2. Identify feedback information for analysis
3. Maintain customers' co-operation throughout the collection process
4. Use a collection process which does not damage the reputation of the organisation
5. Record feedback in line with organisational procedures
6. Maintain the confidentiality of customers information and feedback
7. Store feedback according to organisation requirements
8. Select feedback for analysis which is suited to the purpose of the evaluation
9. Extract and synthesise feedback for analysis
10. Present the results of the analysis on time and according to evaluation criteria
11. Identify, and where possible, rectify gaps and deficiencies in the data for analysis
12. Seek further assistance to enhance the accuracy of analysis as necessary

Collect and analyse customer feedback

Knowledge and understanding

You need to know and understand:

1. The different ways of obtaining feedback from customers
2. How to identify key data that will meet the needs of the evaluation
3. The principles of customer research
4. The principles of sampling customers to obtain feedback
5. The types of opportunities to approach customers for feedback
6. The types of feedback data that can be obtained from customers and the validity of the selected type in meeting evaluation needs
7. How to select the most useful feedback opportunities and plan data collection
8. The factors affecting the collection and analysis of customer feedback data
9. The time constraints, cost and staffing that affect obtaining and analysing customer feedback

Collect and analyse customer feedback

Scope/range	Feedback information:
	a) quantitative
	b) qualitative

Collection process:
    a) face-to-face
    b) telephone
    c) text messaging
    d) mobile app
    e) email
    f) online

Recorded:
    a) manually
    b) electronically

Collect and analyse customer feedback

Behaviours

1. Establish and maintain productive relationship with customers providing feedback.

Collect and analyse customer feedback

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT23
Relevant Occupations	Senior Travel Adviser; Travel and Tourism Service Occupations; Senior Leisure Travel Consultant
Suite	Travel and Tourism
Keywords	collect, analyse, customer, feedback, quantitative, qualitative, evaluation

Work Situation

Contributing to developing individuals

Goal of work situation:
To support the development of individuals through identification of the skills, knowledge and competencies required to achieve objectives and goals, and supporting them to fulfil their potential.

Brief outline:
This is about developing individuals to meet objectives and plans within your own area of responsibility. This involves establishing current levels of knowledge and skills and supporting the development of individuals to meet the planned requirements.

Performance requirements
1. Identifying the knowledge, skills and competencies needed to deliver objectives and plans for own area of responsibility
2. Reviewing the existing capacity and capability within own area of responsibility to meet identified knowledge skills and competencies required
3. Identifying opportunities for individuals within own area of responsibility to develop their careers
4. Undertaking learning and development needs analysis for individuals to help them understand how they can develop within their roles
5. Supporting individuals to develop personal learning and development plans to identify their potential learning and development opportunities
6. Providing access to relevant opportunities for individuals to learn and develop within their roles
7. Monitoring and reviewing individual personal learning and development plans to identify any new learning and development opportunities

Knowledge and understanding requirements
1. What knowledge, skills and competencies individuals need to deliver objectives and plans within own area of responsibility
2. Opportunities for individuals' career development in your area of responsibility
3. How to assess the current knowledge, skills and competencies of individuals and identify gaps and learning and development needs
4. How individuals' appraisals can be used to identify their learning and development needs
5. Sources of advice, guidance and support on learning and development
6. How to identify learning opportunities and how learning and development needs can be fulfilled
7. What the different learning styles are and how they affect learning
8. The importance of taking account of equality legislation, any relevant codes of practice and general diversity and inclusion issues in providing learning and development opportunities for individuals and how to do this
9. How to recognise obstacles to learning and development and provide support to overcome these
10. How to motivate individuals to take responsibility for their own learning and development
11. The principles of effective mentoring and coaching and how to apply these to support individuals with their learning and development
12. How to develop, monitor, review and amend learning and development plans
13. How to evaluate the success of learning and development interventions

Work Situation

Evaluating promotional displays

Goal of work situation:
To effectively evaluate promotional displays to ensure they are fit for purpose in line with organisational requirements.

Brief outline:
This is about evaluating promotional displays to ensure they meet intended requirements and are safe and secure. This also covers escalating issues and making improvements within area of responsibility.

Promotional activities may include retail displays, window dressing and use of graphics and materials.

Performance requirements
1. Obtaining information on promotional displays requiring evaluation in line with organisational policies and procedures
2. Preparing evaluation support materials in line with organisational policies and procedures
3. Checking promotional displays meet requirements of the display criteria in line with organisational policies and procedures
4. Assessing safety and security of promotional displays in line with legislative and regulatory requirements and organisational policies and procedures
5. Obtaining feedback from colleagues on promotional displays to identify areas for improvement in line with organisational policies and procedures
6. Escalating issues with promotional displays in line with organisational policies and procedures
7. Actioning authorised improvements to promotional displays in line with organisational policies and procedures
8. Recording evaluations, including any improvements and changes made to displays, in line with organisational policies and procedures

Knowledge and understanding requirements
1. Organisational policies and procedures, and health, safety and security legislative and regulatory requirements for checking promotional displays and where this information can be found
2. Where to find organisational promotional display guidelines, support materials for checking and evaluating them and the importance of using them for branding, standardisation and improvement of future displays
3. How to assess safety and security of promotional activities
4. Importance of evaluating and improving promotional activities
5. Ways to engage colleagues to provide constructive feedback and why this is important
6. Who to escalate issues to in organisation and when this is required
7. Limits of own authority for resolving issues and making improvements
8. Organisational recording arrangements for evaluating promotional activities

Work Situation

Leading meeting agenda items

Goal of work situation:
To lead specific meeting agenda items in line with own role, responsibility and to meet organisational policies and procedures.

Brief outline:
This is about leading on specific agenda items at team meetings. This involves attending meetings to lead on specific agenda items in line with managers expectations.

Note: Meetings may also be called briefings

Performance requirements
1. Checking purpose and agenda of the meeting with organiser in line with organisational policies and procedures
2. Clarifying own objectives for team meetings with meeting organiser in line with organisational policies and procedures
3. Confirming how team meetings will be delivered in line with organiser and organisational policies and procedures
4. Preparing relevant information to support agenda input in line with role, responsibilities and meeting agendas
5. Communicating required information at team meetings in line with role and responsibilities and organisational requirements
6. Responding to queries, before or during meeting, raised in relation to agenda items to clarify understanding
7. Managing time during meetings in line with meeting schedules
8. Reflecting on input to team meetings to support own continuous improvement

Knowledge and understanding requirements
1. Importance of understanding purpose, agenda and objectives of meetings
2. Importance of preparing own input to meetings and how to do this
3. Different ways in which meetings can be delivered, including face to face and digitally, and how to adapt communication styles
4. How to identify relevant information in advance of meetings
5. How to effectively manage agenda timings and the importance of this
6. How to encourage attendees to contribute and participate in meetings and the importance of this
7. Why it is important to reflect on your input to team meetings and how to do this

Maintain good environmental practice in day to day work activities

Overview

This Standard is about maintaining good environmental practice in day to day work activities. You are required to know the content of organisational policies and procedures, identify and report any actual or potential risks, minimise risks and use resources responsibly and know who the people are in your workplace to whom you should report environmental matters. You are also required to identify anything in your job role that could cause harm to the environment.

This Standard is for anyone who is involved in maintaining good environmental practice in day to day work activities.

Maintain good environmental practice in day to day work activities

Performance criteria

You must be able to:

1. seek information from reliable sources on organisational policies and procedures relating to environmental practice
2. remain up-to-date on environmentally-friendly working practices which are relevant to your workplace at all times
3. recycle and dispose of waste in line with organisational procedures
4. use information from reliable sources to identify current working practices and the use of materials, products or equipment which could cause harm to the environment
5. take appropriate action within the limits of your authority to adapt your working practice and use of materials, products or equipment to minimise environmental risk
6. use resources in line with environmental working practice
7. report any differences between legal regulations and workplace instructions and practice to appropriate people at appropriate times
8. report hazards which present high risks to appropriate people without delay

Knowledge and understanding

You need to know and understand:

1. your responsibilities for the environment as defined by legislation and workplace policies and procedures
2. the environmental monitoring requirements of the organisation that apply to your role
3. the particular risks to the environment which may be present in your workplace and/or in your own job role
4. the importance of remaining alert to the presence of hazards to the environment in the whole work place and promptly reporting, risks to the environment
5. the responsible people to whom to report environmental matters
6. organisational arrangements for recycling and disposal of waste
7. safe working practices and procedures for your own job role relating to the control of risks to the environment
8. correct handling instructions for materials which can be hazardous to the environment
9. how to identify misuse of materials, or products which are hazardous to the environment
10. communication methods and techniques
11. suppliers', manufacturers' and workplace instructions for the use of equipment, materials and products which can be hazardous to the environment

Maintain good environmental practice in day to day work activities

Developed by	Creative & Cultural Skills
Version Number	2
Date Approved	March 2018
Indicative Review Date	March 2021
Validity	Current
Status	Original
Originating Organisation	Creative & Cultural Skills
Original URN	CCSCV23
Relevant Occupations	Cultural Venue Assistant
Suite	Cultural Venue Operations
Keywords	cultural; venue; operations; environment; environmental; risk

PPLTT07

Make sure your own actions reduce risks to health and safety and promote well-being

Overview

This standard is about the health, safety and well-being 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.

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

When you have completed this standard, you will be able to demonstrate your knowledge of and ability to:
• Make sure your own actions reduce risks to health and safety and promote well-being

Make sure your own actions reduce risks to health and safety and promote well-being

---

Performance criteria

You must be able to:

1. Carry out your work in accordance with your training, organisational procedures, and relevant legal requirements
2. Identify those aspects of your workplace and the working practices in your job which have the potential to harm yourself, colleagues or customers, and those which present the highest risk
3. Take action to respond to and control hazards in your workplace in accordance with your organisational procedures, responsibilities and relevant legal requirements
4. Follow your organisation's procedures in the event of an incident, accident and / or emergency
5. Record and report incidents and accidents in line with your organisation's procedures and relevant legal requirements
6. Follow your organisation's procedures for promoting mental health and well-being

Knowledge and understanding

You need to know and understand:

1. The definition of hazards and risks
2. The hazards and risks which exist in your workplace and the organisational procedures you must follow to minimise them
3. Your responsibilities and relevant legal requirements for maintaining health and safety in the workplace
4. The importance of remaining alert to potential hazards in the workplace
5. How to respond to hazards and control risks in line with your organisational procedures and your responsibilities
6. The importance of personal behaviour and presentation in maintaining the health and safety of yourself, colleagues, customers in the workplace
7. The responsible person to whom you should report health and safety matters which are outside the limits of your responsibilities
8. Where and when to get additional health and safety assistance if required
9. Your organisation's procedures for responding to incidents and emergencies and the importance of following them
10. Your organisation's procedures and the relevant legal requirements for recording and reporting accidents and incidents
11. When and how to access first aid within your organisation
12. The meaning of mental health and well-being
13. The internal and external sources of support for mental health and well-being issues
14. Your organisational procedures for promoting mental health and well-being

Make sure your own actions reduce risks to health and safety and
promote well-being

Scope/range

Risks include those associated with the following:
    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

The responsible person to whom to report health and safety matters include:
    a) Supervisor
    b) Line manager
    c) Senior manager
    d) Health and safety officer / coordinator / manager

Incidents and emergencies include:
    a) Fire
    b) Flood
    c) Bomb threat
    d) Security
    e) Theft
    f) Threatening person or behaviour

Make sure your own actions reduce risks to health and safety and promote well-being
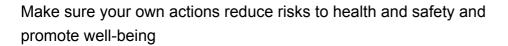
Behaviours

1. Act responsibly at all times
2. Be observant to activities going on around you

Glossary

Customers and colleagues includes internal and external customers, work colleagues, visitors, suppliers, and contractors

Make sure your own actions reduce risks to health and safety and promote well-being

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT07
Relevant Occupations	Bookings or Reservations Administrator; Business Travel Consultant; Leisure and Travel Service Occupations; Leisure Travel Consultant; Local Tour Guide; Personal Service Occupations; Senior Leisure Travel Consultant; Senior Travel Adviser; Senior Customer Service Adviser; Travel Adviser; Travel and Tourism Service Occupations; Tourism Assistant; Tourism Information Officer; Team Leaders; Overseas Resort Representative
Suite	Travel and Tourism
Keywords	actions, reduce, hazards, risks, health and safety

Monitor and communicate information which impacts on customers' travel arrangements

Overview

This standard is about monitoring travel alerts and other related information which has the potential to impact customers whilst travelling for business or leisure. This involves obtaining and extracting relevant information from sources such as Government Departments, ABTA, the CAA and ATOL, assessing the risks and identifying the potential impact on your customers. This also involves communicating the relevant information to colleagues to enable them to take the appropriate action to inform customers of the implications to their travel arrangements.

This standard is for senior travel consultants and agents, supervisors and team leaders for both leisure and business / corporate travel.

When you have completed this standard, you will have demonstrated your understanding of and your ability to:
• Monitor and communicate information which impacts on customers' travel arrangements

Monitor and communicate information which impacts on customers' travel arrangements

Performance criteria

You must be able to:

1. Identify the sources of information which need require monitoring
2. Monitor the sources of information in line with organisational policies and procedures
3. Validate the information with the nominated responsible individual within your organisation
4. Extract the information which is relevant to your customers' travel arrangements
5. Assess the risks associated with the information you have received and identify the implications for the customers' travel arrangements
6. Communicate the information to relevant colleagues following organisational procedures
7. Check colleagues have understood the information being provided and the required actions to take

Monitor and communicate information which impacts on customers' travel arrangements

Knowledge and understanding

You need to know and understand:

1. The type of information which has the potential to impact on customers' travel arrangements, and where to find it
2. Your organisation's procedures for monitoring information which has the potential to impact on customers' travel arrangements
3. The importance of validating the information with the responsible individual within your organisation
4. How to extract the information which is relevant to your customers' travel arrangements
5. The types and level of risk associated with the information extracted, and how to identify the implications of the information on customers' travel arrangements
6. Your organisation's procedures for communicating information which impacts on customers' travel arrangements to colleagues
7. The importance of checking colleagues' understanding of the information provided and actions to take as a result
8. The potential implications of providing incorrect or inappropriate information which impacts on customers' travel arrangements to colleagues

Monitor and communicate information which impacts on customers'
travel arrangements

Scope/range

Risks include:
    a) Health e.g. food poisoning outbreaks, viral outbreaks, pandemics
    b) Safety e.g. physical, well-being, natural disasters
    c) Security e.g. crime rate, terrorist attacks
    d) Financial e.g. airline goes out of business
    e) Cultural e.g. diversity, local customs
    f) Entry requirements e.g. visa requirements, travel documents,
    passport
    g) Political e.g. unstable government, border access / controls

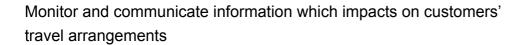Responsible individual may be one of the following from within your
organisation:
    a) Your supervisor or line manager
    b) A colleague within your department
    b) A colleague from another department
    c) A senior manager

Monitor and communicate information which impacts on customers' travel arrangements

Glossary

ATOL – Air Travel Organiser's License
CAA – Civil Aviation Authority

Monitor and communicate information which impacts on customers' travel arrangements

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT58
Relevant Occupations	Bookings or Reservations Administrator; Customer Service Occupations; Leisure and Travel Service Occupations; Leisure, travel and tourism; Personal Service Occupations; Tourism Assistant; Tourism Information Officer; Town Planners; Travel Adviser
Suite	Travel and Tourism
Keywords	collect, maintain, tourism, information, data

Monitor and solve customer service problems

Overview

This standard is part of the customer service competence area related to Handling Problems, Queries and Complaints. It includes monitoring and solving customer service problems. It covers the behaviours, processes and approaches that are most effective when handling customer service problems. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

You deliver and organise customer service, however some of your customers will experience problems and you can spot and solve these before your customers even know about them. You also get involved in changing systems to avoid repeated customer service problems. Some customers judge the quality of your customer service by the way that you solve customer service problems. You impress customers and build their loyalty by sorting out problems and impress customers in a way that would not have been possible if everything had gone smoothly. Sometimes you may seek specialist support where a problem cannot be resolved. You also manage your customers when they expect more than your organisation can offer or because your service procedures have not been followed.

This standard is for customer service professional who monitor and solve customer service problems.

Monitor and solve customer service problems

Performance criteria

You must be able to:

1. respond to customer service problems following organisational guidelines
2. listen carefully to your customers when they raise problems
3. ask your customers about the problem to check your understanding
4. identify problems with systems and procedures before they begin to affect your customers
5. solve problems with service systems and procedures that might affect customers before they become aware of them
6. inform managers and colleagues of the steps taken to solve systems and procedures problems
7. identify repeat customer service problems
8. compare the solutions for dealing with repeat customer service problems and the advantages and disadvantages of each
9. select the best solution for solving a repeat customer service problem, balancing customer expectations with your organisation's needs
10. obtain approval for the solution from decision makers to reduce the chance of problems being repeated
11. action and monitor your agreed solution to reduce repeat problems
12. work with colleagues to identify and confirm the options to resolve a customer service problem
13. evaluate the advantages and disadvantages of each option for your customer and your organisation
14. select the best option to meet your customers and your organisation's needs
15. discuss and agree the options for solving the problem with your customers
16. seek specialist support to resolve customer problems, when required
17. take action to implement the option agreed with your customers
18. work with colleagues and customers to check that any promises related to solving the problem are kept
19. keep your customers informed about what is happening to solve their problem
20. confirm with your customers that the problem has been solved to their satisfaction
21. give clear reasons to your customer when you are unable to solve the problem to their satisfaction
22. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. your organisation's procedures and systems for dealing with customer service problems
2. how to actively listen to customers when they raise concerns to demonstrate empathy and understanding
3. the types of questions that help to gather information about problems and customer feelings about them
4. your organisational procedures and systems for identifying repeated customer service problems
5. how the successful resolution of customer service problems contributes to customer loyalty with external customers and improved working relationships with service partners or internal customers
6. the methods used to identify repeat service problems
7. how to develop potential solutions to problems with colleagues
8. the importance of balancing customer expectations with your organisation's needs
9. how to negotiate with and reassure customers while their problems are being solved within the agreed timescales
10. the opportunities and potential for monitoring and solving customer service problems using remote information collection and sharing such as through social media
11. how to defuse potentially stressful situations related to customer service problems
12. the limitations of what you can offer your customers in relation to your organisation's services and products
13. the types of action and behaviours that may make a customer problem worse and how to avoid these
14. how to choose the most effective method of communication when dealing with customer service problems
15. how to use of remote communications with customers through social media when resolving customer problems
16. the types of specialist support to resolve customer problems, when required
17. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Monitor and solve customer service problems

Developed by	Skills CFA
Version Number	1
Date Approved	22 Feb 2021
Indicative Review Date	01 Mar 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFACSC3, CFACSC5
Relevant Occupations	Customer Service Occupations
Suite	Customer Service
Keywords	monitor problems; customer service problems; customer loyalty; impress; customer service; communication; problem solving; work with others; team working; giving information; receiving information services;

Monitor business performance

Overview

This standard is about your contribution to monitoring the performance of the business. Business objectives and targets are applied in all industries to establish a framework, against which the performance of the business and its staff can be measured. It is vital to be aware of the areas in which effort towards improvement is required, in order that resources can be most effectively deployed.

This standard is for senior travel consultants, team leaders and supervisors who have responsibility for contributing to the day-to-day monitoring and reporting of business performance in travel and tourism businesses.

When you have completed this standard, you will have demonstrated your understanding of and your ability to:

- Monitor business performance

Performance criteria

You must be able to:

1. Identify the key business targets and performance indicators used to monitor business performance in your area of responsibility
2. Maintain the business records required to monitor business performance, confirming they are up-to-date in accordance with organisational procedures
3. Identify and analyse information relating to the targets and performance indicators used to monitor business performance within your area of responsibility
4. Identify, monitor and investigate the causes of significant variations between planned and actual business performance
5. Report business performance to colleagues/management in line with organisational procedures
6. Seek suggestions from colleagues for improving business performance
7. Develop plans for improving business performance in line with your organisational procedures and available resources

Monitor business performance

Knowledge and understanding

You need to know and understand:

1. The business targets and key performance indicators and how these relate to monitoring business performance in your own area of responsibility
2. How to keep accurate and up-to-date records required to monitor business performance
3. How to identify and analyse data used to monitor business performance
4. The factors that can affect the performance of a business
5. The current market conditions in the industry and their possible effects on business performance
6. The importance of involving staff in the collection and analysis of data used to monitor business performance
7. How frequently you are required to check the actual business performance to obtain reliable data
8. The consequences of changes in operational processes
9. The actions of your colleagues and the effects that they may have on business performance
10. The information on business performance you are required to provide to colleagues/management
11. The required presentation formats for business performance information
12. The possible factors that may cause variations between target performance and that which achieved
13. The different ways of presenting ideas for improving business performance
14. How to develop plans for improving business performance in line with organisational procedures and available resources

Scope/range   Targets and performance indicators include those related to:
a) sales
b) costs
c) service

Behaviours

1. Carry out monitoring efficiently to minimise disruption
2. Careful analysis of performance data
3. Involve colleagues in identifying possible causes of significant variations

Monitor business performance

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT50
Relevant Occupations	Bookings or Reservations Administrator; Business Travel Consultant; Leisure and Travel Service Occupations; Leisure Travel Consultant; Local Tour Guide; Personal Service Occupations; Senior Leisure Travel Consultant; Senior Travel Adviser; Senior Customer Service Adviser; Travel Adviser; Travel and Tourism Service Occupations; Tourism Assistant; Tourism Information Officer; Team Leaders; Overseas Resort Representative
Suite	Travel and Tourism
Keywords	monitor, business, performance, key business targets, key performance indicators, variations, planned and actual

Order stock

Overview

This standard is about ordering stock in line with established purchasing agreements. It details several ordering methods, such as electronically, as well as the type of information that is consistently required during the ordering process.

When you have completed this standard you will have demonstrated your understanding of and your ability to:

* Order stock

Order stock

Performance criteria

You must be able to:

1. Check stock levels on a regular basis and consult with colleagues to determine if new stock is required
2. Identify stock requirements, ensuring sufficient storage space will be available upon arrival
3. Obtain relevant documentation for ordering stock and where required obtain permission from the proper person to place an order
4. Complete required information on documentation and use the correct method of ordering within the time required to ensure delivery before current stock is finished
5. Maintain documentation in line with organisational requirements
6. Obtain and file notification of placed orders and notification from supplier
7. Respond to queries and solve problems that arise about the order within your authority

Order stock

Knowledge and understanding

You need to know and understand:

1. What the ordering process is in own area of responsibility
2. When you should order new stock in line with organisational requirements
3. Who is responsible for arranging the central purchasing agreement
4. What the central purchasing agreement contains
5. Why and who to contact when problems occur with the ordering process
6. When ordering needs to be approved by a line manager
7. Where to obtain the ordering documentation from
8. What information needs to be entered on the documentation
9. Where ordering documentation is kept

Order stock

Scope/range

1. Stock requirements
1.1 product type
1.2 product brand
1.3 amount

2. Required information
2.1 quantity
2.2 product type
2.3 date for required delivery
2.4 contact details

3. Method of ordering
3.1 electronic
3.2 in person
3.3 telephone

4. Problems
4.1 quantity
4.2 time
4.3 non-delivery
4.4 availability
4.5 type
4.6 quality

Glossary

Ordering documentation may be paper based or electronic depending on the process and system used by the organisation

Developed by	People 1st
Version Number	3
Date Approved	01 Mar 2022
Indicative Review Date	28 Feb 2027
Validity	Current
Status	Original
Originating Organisation	People 1st International Ltd
Original URN	PPL2GEN2
Relevant Occupations	Bar Staff, Chef, Cook, Kitchen Assistant, Team Member
Suite	Hospitality - Generics
Keywords	order stock, purchasing, ordering, delivery, stock, ordering, supplier

Process foreign exchange transactions in travel and tourism

Overview

This standard is about maintaining and undertaking day-to-day foreign exchange services within a travel or tourism environment. This involves receiving, handling and storing stocks of foreign currencies, processing customers' requirements for exchanging currency and providing current information on exchange rates, limits and restrictions, as well as completing stock and sales records and documenting selling and buying transactions.

The standard is for staff engaged in foreign exchange activities either face-to-face or remotely.

When you have completed this standard, you will be able to demonstrate your knowledge of and ability to:
• Process foreign exchange transactions in travel and tourism

Process foreign exchange transactions in travel and tourism

Performance criteria

You must be able to:

1. Place orders for foreign exchange with your suppliers in time to meet anticipated demand and your organisation's procedures
2. Confirm orders for foreign exchange are kept within your organisation's agreed limits
3. Check stocks of foreign exchange to ensure the type and quantity held meet your customers' requirements at the time of transaction
4. Maintain the required foreign exchange stock in line with your organisation's procedures
5. Comply with your organisation's foreign exchange audit requirements
6. Store currencies in line with your organisation's security procedures
7. Confirm currency stock receipt records are accurate and up to date
8. Display current currency buying and selling exchange rates following organisational procedures
9. Recommend the most advantageous currency accepted in the country your customers are travelling to, when relevant
10. Advise customers on the best mix of currencies and currency cards to meet their individual needs
11. Calculate each transaction using the relevant exchange rate
12. Confirm all transactions are made in compliance with current legislation
13. Explain the transaction and any costs to your customers in a way they will understand
14. Explain any restrictions attached to foreign exchange products, when relevant
15. Process foreign exchange transactions in line with your organisation's procedures and relevant legal requirements
16. Identify and take action to resolve any suspect transactions, following relevant legal and your organisation's procedures
17. Confirm all your transaction records are accurate and up to date and your reconciliation balances at the end of your shift
18. Follow your organisation's procedures to maintain the safety and security of currency, documents, customers and yourself

Process foreign exchange transactions in travel and tourism

Knowledge and understanding

You need to know and understand:

1. The current legislation affecting foreign exchange services and regulations relating to money laundering
2. Where to find information on national currencies worldwide and currency codes, currency limits and / or restrictions, and available alternatives
3. The currencies of the countries to which your organisation sends large amounts of customers and the seasonal demand for particular currencies
4. Where your organisation buys foreign currency and currency cards from
5. The purpose and function of money transfer agents and when to use their services
6. Where to find information on orders and how to calculate anticipated needs and the importance of accurately forecasting needs and maintaining stocks
7. The organisation's policy on foreign exchange stock management including the optimum amounts of stock that need to be held to meet anticipated demands, operating limits on stock holding and cash holding, the consequences of holding the incorrect levels of stock, and how to deal with non-resalable stock
8. Your organisation's foreign exchange audit requirements
9. The types of foreign exchange rates, when and how to use them and the frequency a which they must be monitored
10. Where to find foreign current exchange rates and commission charged
11. The importance of displaying and using current foreign exchange rates
12. Your organisation's policy on establishing local exchange rates
13. The rules related to checking calculations and when local rates must be recalculated
14. How to explain currency transactions and their costs to customers in travel and tourism
15. How to calculate total transaction charges using exchange rates and commission rates, the limits of your authority to alter them, and where to get authority to offer preferential rates in travel and tourism
16. The importance of offering rates that take into account local conditions using competitive rates and monitoring competitors
17. The significance of the spread between buying and selling rates
18. How to advise customers of the best mix of currencies and currency cards when travelling in different parts of the world
19. The importance of giving accurate information about foreign exchange to customers in travel and tourism
20. How to process and validate payments from different payment methods
21. Who to inform regarding large buy or sell transactions and the

significance of passing on information about such transactions

22. Your organisation's procedures for receiving, handling and storing stock, completing stock and sales records, processing and documenting selling and buying transactions, and the importance of following them

23. Your organisation's procedures for maintaining the safety and security of currency, documents, customers and yourself

Process foreign exchange transactions in travel and tourism

Scope/range	Anticipated demand:
	a) Immediate use
	b) Reserve stock
	c) Advance orders
	d) On-line orders

Foreign exchange:
    a) Foreign currencies
    b) Currency cards

Exchange rate:
    a) Buy
    b) Sell

Payment methods:
    a) credit cards
    b) debit cards
    c) contactless cards
    d) apps
    e) electronic transactions
    f) cash
    g) bank cheques

Process foreign exchange transactions in travel and tourism

Scope/range related to performance criteria

1. Work methodically and accurately
2. Be alert to security and safety risks
3. Demonstrate financial acumen

Process foreign exchange transactions in travel and tourism

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT17
Relevant Occupations	Business Travel Consultant; Leisure Travel Consultant; Leisure and Travel Service Occupations; Personal Service Occupations; Senior Leisure Travel Consultant
Suite	Travel and Tourism
Keywords	complete, foreign exchange, transactions

Process travel services bookings

Overview

This standard is about processing bookings for travel services, making sure that customers' details are captured and that all post booking documentation is up-to-date and available for customers.

With the increase of electronic bookings, and the reduction in travel ticket issues, it is particularly important that post booking documentation is completed accurately and quickly for ease of availability to customers.

The standard is for all staff in contact with customers and responsible for ensuring that travel arrangements are confirmed and processed promptly and accurately after products and services have been sold.

When you have completed this standard, you will be able to demonstrate your knowledge of and ability to:
• Process travel services bookings

Process travel services bookings

Performance criteria

You must be able to:

1. Confirm customers' details and travel services booking arrangements are accurate
2. Use travel services booking systems in line with organisational procedures
3. Record customers' information in line with organisational procedures and current data protection legislation
4. Process travel services documentation after the booking is complete, following your organisation's and suppliers' procedures
5. Provide confirmation of the travel services booked to customers and suppliers
6. Issue copies of travel and other documentation to customers and suppliers within the timescale required and according to your organisation's procedures
7. Update travel and additional services documentation as necessary
8. If identified, deal with travel services bookings discrepancies in line with organisational procedures
9. Handle and store travel services booking information and documentation following your organisation's procedures and relevant legal requirements

Knowledge and understanding

You need to know and understand:

1. The relevant industry codes of practice and legislation regarding leisure or business travel responsibilities
2. The importance of accurate and secure record keeping
3. How relevant legislation affects the ways in which you record and store personal information
4. The types of travel documentation that can be issued and completed
5. How to process, monitor and log travel services bookings and issue documentation
6. The relevant booking terms and conditions
7. The abbreviations and terms used on travel documentation
8. The multi-channel methods of making documents available to customers
9. Your organisation's and supplier's procedure for completing bookings
10. Your organisation's systems for processing travel services bookings
11. The types of travel documentation used in your organisation
12. The types of customer information that must be recorded and means of maintaining necessary confidentiality
13. How to use current travel services booking systems
14. The consequences of booking errors or incorrect issue or process of documents
15. The importance of accuracy in documentation

Process travel services bookings

Scope/range	Booking arrangements includes:

Scope/range

Booking arrangements includes:
   a) Package holidays
   b) Mode of travel e.g. air, coach, bus, rail, tram, ferry, cruise
   c) Accommodation
   d) Sustainable options
   e) Accessible options
   f) Additional services e.g. car hire, VIP lounges, car parking, transport to and from departure point, accommodation, insurance, pre-bookable excursions and tickets, tour operators' extras, ski packs, upgrades e.g. cabin, drinks, meal, other transport, passports, visas, meetings, incentives, conferences and exhibitions (MICE), sporting packages, events, foreign exchange, airline extras.

Documentation includes:
   a) Pre-issued
   b) On departure
   c) E-tickets
   d) Ticketless

Process travel services bookings

Behaviours

1. Work methodically and with an eye for detail
2. Refer all matters outside of your work responsibilities or experience to the relevant person
3. Work speedily and accurately

Links to other NOS

PPLTT01 Sell travel-related products and services

Process travel services bookings

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT02
Relevant Occupations	Leisure and Travel Service Occupations; Senior Customer Service Adviser; Senior Travel Adviser; Personal Service Occupations
Suite	Travel and Tourism
Keywords	Process, travel, services, bookings

Research travel and tourism destination and product information

Overview

This standard is about conducting the research that is necessary to maintain an accurate picture of existing and potential travel and tourism destinations and understanding 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).
The standard is for those responsible for researching travel and destination information and keeping it up-to-date and accurate.

When you have completed this standard, you will be able to demonstrate your knowledge of and ability to:
• Research travel and tourism destination information

Performance criteria

You must be able to:

1. Identify your travel and tourism destinations and product research objectives
2. Recognise and use opportunities to research and collect data and information relating to travel and tourism destinations and products
3. Identify and use sources of data and information that meet your given research objectives
4. Research and collect data and information relating to travel and tourism destinations and products using a variety of methods to meet your organisation's requirements
5. Identify any gaps in sets of data and information researched and collected, and assess their impact on conclusions
6. Research and collect data and information on travel and tourism destinations and products at times and frequency to meet your research objectives
7. Confirm the validity of the data and information researched and collected in line with organisational procedures
8. Record and present data and information on travel and tourism destinations and products in the format required by your organisation
9. Store, archive or dispose of data and information on travel and tourism destinations and products in line with organisational procedures

Research travel and tourism destination and product information

Knowledge and understanding

You need to know and understand:

1. The types of travel and tourism destination and product information typically required by customers
2. How to identify your travel and tourism destination and product research objectives
3. Where to find reliable data and information on travel and tourism destinations and products, how to access it and when to use it
4. How to research and collect travel and tourism destination data and information which is relevant to business and customer needs e.g. reasons why customers visit destinations
5. How to use electronic inputting and recording systems to collect data and information on travel and tourism destinations and products
6. Why it is necessary to highlight gaps in sets of research data and information, and how such gaps can impact on conclusions
7. How relevant research on travel and tourism destinations and products contributes to business success and customer satisfaction
8. How to use your organisation's data and information systems when researching travel and tourism destination and product information
9. Your organisation's requirements and procedures for recording and storing researched travel and tourism destination and product data and information, presenting the outcomes of the research, and disposing or archiving of data and information which is inaccurate, out-of-date or irrelevant

Research travel and tourism destination and product information

Scope/range

Travel destinations:
domestic
overseas

Products:
attractions
local transport
tourist facilities
places of interest
sustainable
eco-friendly
community-based

Sources:
printed
electronic

Record:
manually
electronically

Behaviours

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

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT08
Relevant Occupations	Business Travel Consultant; Leisure and Travel Service Occupations; Leisure Travel Consultant; Local Tour Guide; Overseas Resort Representative; Personal Service Occupations; Tourism Assistant; Tourism Information Officer
Suite	Travel and Tourism
Keywords	research, travel, destination, information

Review and improve the customer experience

Overview

This standard is about contributing to the review and continuous improvement of the customer experience within your organisation. This involves obtaining, reviewing and using feedback from your customers and colleagues to gauge customers' experience of the products and services you offer, and identify ways in which this could be improved. This also involves sharing your ideas with your team and working with them to agree, implement and review actions to ensure the customer experience is continuously improved.

This standard is for travel consultants and travel agents for both leisure and business / corporate travel.

When you have completed this standard, you will be able to demonstrate your knowledge of and ability to:
• Review and improve the customer experience

Review and improve the customer experience

Performance criteria

You must be able to:

1. Obtain and review feedback from your customers and colleagues on the customers' experience of products and services in line with organisational procedures
2. Use the information obtained to gain an understanding of the customers' experience with your organisation's products and services
3. Pass on relevant feedback to internal and external parties (such as suppliers) as appropriate and in line with organisational procedures
4. Identify ways the customer experience could be improved based on the feedback you have obtained
5. Share the ideas you have identified for improving the customer experience with colleagues
6. Work with colleagues to identify the actions your team could take to improve the customer experience in line with organisational procedures
7. Implement the agreed actions to improve the customer experience
8. Review the impact of the implementation of agreed actions and feedback to your team

Review and improve the customer experience

Knowledge and understanding

You need to know and understand:

1. How customer feedback is obtained in your organisation
2. How to make use of all available sources of information and feedback about your customers' experience including what is available through social media
3. Your organisation's procedures for reviewing customer feedback
4. The customer experience with your organisation and the products and services the organisation offers
5. How to identify the types of customer interactions with your products and services throughout the customer experience
6. The methods of analysing information on the customers' experience of the products and services your organisation offers
7. When to pass on customer feedback to internal and external parties and the methods for doing so
8. How your organisation identifies how to make improvements to the customer experience
9. How to work with colleagues and share your ideas for improving the customers' experience
10. How to agree, implement and review the impact of actions for improving customer experience within your organisation

Review and improve the customer experience

Developed by	People 1st
Version Number	2
Date Approved	July 2021
Indicative Review Date	July 2026
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPLTT56
Relevant Occupations	Business Travel Consultant; Leisure and Travel Service Occupations; Leisure Travel Consultant; Local Tour Guide; Overseas Resort Representative; Personal Service Occupations; Tourism Assistant; Tourism Information Officer
Suite	Travel and Tourism
Keywords	research, travel, destination, information

Use bespoke software for dealing with customers

Overview

This standard is part of the customer service competence area related to Customer Service Delivery. It includes using bespoke software for dealing with customers. It covers planning, organising and controlling customer service operations. It includes customer service behaviours and processes that have most impact on the customer experience during Customer Service Delivery. Remember that customers include everyone to whom you provide products and services. They may be external to your organisation or they may be internal customers.

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or online. You navigate the system quickly by following recommended routes and using the functionality of the system. Customers are unaware of the details of the system you are using and keep them informed of the different steps you are taking. Your use of the system ensures that you keep records of the transaction so that it can proceed successfully through to the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software.

This standard is for customer service professionals who are responsible for using bespoke software when dealing with customers.

Use bespoke software for dealing with customers

Performance criteria

You must be able to:

1. access your organisation's software system using your unique log in details
2. navigate to the bespoke customer service software to check that you can access all the areas you need to carry out your role
3. build your familiarity with the software manual, help screens or help lines to know where to locate technical support when needed
4. prepare your work area to deliver customer service using the bespoke software
5. identify your customers and the services or products they wish to access
6. follow organisational procedures to step through the system to respond to customers' needs
7. use search or other specialist functions within the software to respond to customer requests
8. enter new customer service records using the bespoke software system
9. amend customer service records in the bespoke software system
10. communicate with your customers when the software system using non-technical language
11. follow organisational procedures to structure customer conversations that follow the paths and sequences of the bespoke software
12. interpret and act on error messages to support your customer service
13. refer your customer to colleagues if you are unable to complete transactions
14. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Use bespoke software for dealing with customers

Knowledge and understanding

You need to know and understand:

1. the log in routines for your organisation's bespoke software system
2. the architecture and geography of the bespoke software system and how to navigate your way around it to access what you need
3. the different screen or menu routes that can be followed to meet customer requirements and how to structure your customer conversations to align with them
4. the sources of support and help for the bespoke software including manuals, help screens and help lines
5. the importance of preparing a work area before delivering customer service and the impact this has on your work
6. your organisation's customers and the services and products that you can offer to them
7. the search or other enquiry facilities within the bespoke software system
8. how to complete new customer records and capture information following your organisation's processes and guidelines
9. the methods used to amend and update customer service records in the bespoke software system
10. the importance of avoiding jargon and system terminology when communicating with customers
11. how to respond to error messages when using a bespoke software system
12. the referral points and sources of information when you are unable to meet customer needs using the bespoke software system
13. the links between the bespoke software system and open networks or social media platforms that may be relevant to communication with your customers
14. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Use bespoke software for dealing with customers

Developed by	Skills CFA
Version Number	1
Date Approved	22 Feb 2021
Indicative Review Date	01 Mar 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFACSB7
Relevant Occupations	Customer Service Occupations
Suite	Customer Service
Keywords	bespoke software; contact centres; telephone; on-line; functionality; customer service; communication; problem solving; work with others; teamwork; giving information; receiving information services

Work Situation

Using social media to engage with customers

Goal of work situation:
To use social media effectively to engage and provide customers with excellent customer service.

Brief outline:
This is about engaging with customers through social media platforms to satisfy customers by meeting their needs and requirements, respond to feedback and promote the organisation in line with organisational policies and procedures. This involves monitoring organisation's own social media platforms to support customers' queries and posts.

Performance requirements
1. Scanning social media exchanges to identify relevant customers' interests in line with organisational policies and procedures
2. Checking postings on social media platforms to interpret customers' needs and requirements
3. Responding to direct queries and requests for information through social media communications in line with legislative and regulatory requirements and organisational policies and procedures
4. Explaining services and products offered by own organisation to customers on social media platforms in line with organisational policies and procedures
5. Communicating professionally on social media platforms in line with legislative and regulatory requirements and organisational policies and procedures

Knowledge and understanding requirements
1. Legislative and regulatory requirements, and organisational policies and procedures for communicating with customers through social media platforms
2. Different types of social media platforms used by own organisation and customers and how to use these
3. Different ways to communicate information through social media platforms
4. How to search social media sources for postings by customers
5. How comments on social media platforms and on-line ratings impact brand and organisational reputation
6. Organisational policies and procedures for response times
7. How to identify customers' interests, requests and needs from postings on social media platforms
8. Services and products offered and what information to share on social media platforms
9. How to interpret customers' needs from their tone and approach of postings on social media platforms and why this is important
10. How to respond to relevant positive, neutral and challenging comments from customers on social media platforms
11. How and when to pass on or escalate challenging comments or customer exchanges to colleagues or other departments
12. Organisational policies and procedures for accepted use of social media platforms
13. How to use social media security settings to control access to exchanges with customers and why this is important
14. How to use social media professionally whilst maintaining organisational reputation and brand