Book and coordinate supplier services

D2.TTA.CL2.04

Assessor Manual

Australian Aid
asean
William Angliss Institute
Specialist centre for foods, tourism & hospitality

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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

All text is produced by William Angliss Institute of TAFE for the ASEAN Project on "Toolbox Development for Tourism Labour Divisions for Travel Agencies and Tour Operations".

This publication is supported by the Australian Government's aid program through the ASEAN-Australia Development Cooperation Program Phase II (AADCP II).

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File name: AM_Book & co-ordinate supplier services_160715

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Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested Assessment Methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative Assessment Methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit
b) The strengths of participants
c) The number of participants in the class
d) Time required to complete assessments
e) Time dedicated to assessment
f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes

- Case studies
- Log books
- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the ‘Other’ section within the ‘Competency Recording Sheet’.

Selection of Assessment Methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

‘Sufficient’ evidence to support the ‘Pass Competent’/’Not Yet Competent’ decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing Competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- ‘Pass Competent’ (PC)
- ‘Not Yet Competent’ (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as ‘Pass Competent’ (PC).

The assessor will award a ‘Pass Competent’ (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent’ (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be ‘Not Yet Competent’ (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of Practice for Assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing Checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

Prior to the assessment I have:	Tick (✓)	Remarks
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for Recording Competency

Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
    - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
    - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

  - You are required to complete these activities:
    a) *Using the 'X' method of assessment*
    b) *At 'X' location*
    c) *You will have 'X time period' for this assessment*
  - You are required to compile information in a format that you feel is appropriate to the assessment
  - Do you have any questions about this assessment?"
- Commence Work Project assessment:
  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
  - Participants complete work projects in the most appropriate format
  - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name
  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

We have 60 minutes for this assessment.

  - I will give you feedback at the end of the assessment
  - Do you have any questions about this assessment?"

- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These written questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability.

  You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

  Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

  We have X time for this assessment:

  - The due date for completion of this assessment is X
  - On this date you must forward the completed questions to the assessor by X time on the date of X
  - Do you have any questions about this assessment?"
- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
  - Pass Competent = Yes
  - Not Yet Competent = No
  - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the ‘Pass Competent’ or ‘Not Yet Competent’ decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency standard

UNIT TITLE: BOOK AND COORDINATE SUPPLIER SERVICES	**NOMINAL HOURS:** 30
UNIT NUMBER: D2.TTA.CL2.04	
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to make and manage bookings for tourism and travel-related products and services for clients with industry suppliers and providers. It does not address the skills and knowledge required to process incoming reservations.	

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE
Element 1: Identify suppliers of products and services **1.1** Identify *suppliers* used by the host enterprise **1.2** Identify *products and services* purchased from suppliers **1.3** Identify *operational requirements relating to the selection and use of suppliers* **1.4** Locate and become familiar with *sources of information* and *resources*, in relation to suppliers, services and products **Element 2: Identify client booking requirements** **2.1** *Create client file* **2.2** *Identify specific client requirements* for supplier services **2.3** Determine and select most appropriate supplier to meet identified client requirements	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to organisations that are involved in booking and coordinating supplier services within the labour divisions of the hotel and travel industries and may include: 1. Front Office 2. Housekeeping 3. Food and Beverage Service 4. Food Production 5. Travel Agencies 6. Tour Operation *Suppliers* may relate to: • Internal and external suppliers • Domestic and international suppliers • Company name • Contact details, including telephone, fax, e-mail and office location/s

2.4 Prepare and supply *quotation to client* **2.5** Confirm *authority to proceed* from client **2.6** Obtain *payment* from client **2.7** *Update client file* **Element 3: Request products and services from supplier** **3.1** *Forward request/s* to selected supplier/s **3.2** Comply with *organisational requirements in relation to placement of requests for bookings of products and services* **3.3** Supply, clarify and confirm all *information related to required products and services* **3.4** Inform suppliers of required response to requests from supplier/s **3.5** Lodge or confirm formal and official *booking/s* **3.6** Seek, and lodge requests with, alternative suppliers as required **Element 4: Maintain client file** **4.1** *Record lodgement of booking* in client file **4.2** Capture and store *relevant records* in client file **4.3** Issue *notification and documents* to client **4.4** *Monitor client file* **4.5** Meet requirements of *scheduled future action*	• Names of key staff/contacts within the supplier business, including position held and areas of expertise. *Products and services* may include: • Transportation and transfers • Accommodation and entertainment • Tours and cruises • Entrances to attractions and sites • Tourist guiding services • Meals, functions and events • Workshops and exhibitions • Special items with corporate branding • Venue, speaker and equipment services • Special event consumable items • Catering. *Operational requirements relating to the selection and use of suppliers* may include: • Contractual enterprise negotiated agreements • Preferred supplier status of companies • Contra-deal arrangements • Reciprocal business relationships • Nominated checks, comparisons and evaluations to be made prior to determining supplier to be used • Individual scope of authority for lodging requests, bookings and spending money on behalf of the host enterprise.

Element 5: Process final booking details for products and services **5.1** Notify supplier of required *adjustments* to initial booking **5.2** *Pay supplier* in accordance with established and/or agreed terms and conditions **5.3** *Up-date client file* **5.4** Inform supplier of final *client information*	*Sources of information* may include: • Internal business sources, including databases and reservation systems either manual or computerised • Direct contact with: ▪ Travel suppliers, including carriers, airlines, cruise operators, railway operators, bus lines, car rental businesses, limousine hire, taxis ▪ Suppliers and providers of support and ancillary services, including travel insurance providers, finance providers, currency exchange, conference and similar venues, and interpreters ▪ Tour operators and wholesalers ▪ Travel agencies and associations ▪ Peak travel bodies ▪ Government tourism industry bodies and authorities, including domestic and international bodies • Literature, including reference books, magazines and newspapers • Websites, including individual companies, directories, news sites, surveys and research sites • Personal network of contacts, including those within the host enterprise and those external to the business. *Resources* may include: • Computerised reservation system, including computerised data/information contained within the system • Airline, carrier and provider guides • Schedules/timetables

	• Fare and tariff manuals
	• Brochures
	• Information kits
	• Catalogues and price lists
	• Personal knowledge and experience.
	
	Create client file may relate to:
	• Preparing paper-based and/or electronic file
	• Establishing and naming file for individual clients
	• Incorporating previous client history into file
	• Allocating specific agent to handle and deal with client
	• Initiating nominated client and file records as required by the host enterprise.
	Identify specific client requirements may include:
	• Meeting with the client, including face-to-face meetings, over the telephone contact and electronic communications
	• Identifying the need to coordinate and integrate services for the booking/s
	• Determining and negotiating individual client wants, needs and preferences
	• Identifying relevant specifics that relate to the identified wants, needs and preferences which may relate to:
	  ▪ Days, dates and times
	  ▪ Duration and frequency
	  ▪ Brands, models and technical specifications
	  ▪ Destinations, venues, attractions and events
	  ▪ Catering and conference requirements
	  ▪ Budget.

	Quotation to client may include: • Records of all alternative suppliers considered including copies of their quotations and/or sample or indicative costs • Including quotation in client file • Forwarding quotation to client, including relevant supporting documentation and/or samples and/or marketing materials. *Authority to proceed* may include: • Verbal notification from client • Signed authority on standard organisational form. *Payment* may include: • Credit card • Cash, personal, business or traveller's cheque • Direct debit, electronic funds transfer • Invoice/account • Telephone payment • E-mail or other electronic transmission. *Forward request/s* may include: • Sending hard copy requests, including mail and personal delivery • Making verbal requests, including face-to-face and over the telephone • Lodging electronic requests, including fax, computerised reservation system and e-mail. *Organisational requirements in relation to placement of requests for bookings of products and services* may include: • Scope of authority limitations

	• Designated person authorities for nominated suppliers • Volume and value consideration related to booking • Method of lodgement • Timing requirements. *Information related to required products and services* may include: • Customer details, name, organisation they represent (where applicable), contact details, previous history, potential for future business with this client • Date, time, location and duration details • Information related to previous pre-negotiated cost and payment details • Nature and scope of services • Special requests. *Response to requests* may include: • Demand for hard copy and/or electronic acknowledgements of receipt of request • Demand for hard copy and/or electronic confirmations of ability to supply products and services as requested • Demand for hard copy and/or electronic responses re inability to supply products and services as requested. *Booking/s* may include: • A single product and/or service • Multiple products and/or services comprising a complete itinerary • Individuals and groups • One-off touring arrangements • Series tours

	• Incentive tours • Meetings and conferences • Payment of deposit or full payment for products and services. *Record lodgement of booking* may include: • Including physical copy of relevant documentation in client file • Noting time and date of lodgement. *Relevant records* may include: • Quotations • Requests for information • Confirmations • Orders lodged • Price lists and other targeted information provided by suppliers in response to specific requests. *Notification and documents* may include: • Copies of communications sent by host enterprise to suppliers • Invoices • Credit notes • Receipts • Confirmation letters, from the host enterprise and those received from suppliers • Price lists and other targeted information provided by suppliers in response to specific requests • Information kits and packs received from suppliers.

	Monitor client file may include: • Confirming that responses have been received from supplier/s as anticipated • Verifying information required from client has been received as required • Coordinating client requirements and availability/provision of services • Checking that payments promised by client have been received • Following-up on outstanding issues as required. *Scheduled future action* may relate to: • Making payments at scheduled times • Providing confirmation by set dates • Up-dating details by schedules timelines • Issuing document on nominated dates. *Adjustments* may include: • Instructions received from client • Cancellation of booking • Change of date and/or time • Change of location, venue or destination • Re-selection of available options • Reduction and/or increase in booking numbers. *Pay supplier* may include: • Taking into account monies already paid • Requesting payment from the accounts department, or self-administering payment • Conforming to approved or required methods of payment • Ensuring timeliness of payment • Completing relevant documentation

	• Adding appropriate notifications into client file and up-dating records as required • Factoring-in commissions due to the host enterprise. *Up-date client file* may include: • Adding confirmations and other responses from suppliers • Adding communications from client • Including documents and records relating to amendments and adjustments to initial request/booking • Up-dating financial status of client file • Receiving, processing and recording payments • Generating and issuing invoices and credit notes for changed arrangements. *Client information* may relate to: • Complying with standard industry terms and conditions • Complying with specific requirements of individual suppliers • Final numbers for group booking • Arrival and departure dates and times for all transportation types relevant to the products and services required • Final name and rooming lists • Details of tourist guides, tour managers, crew accompanying clients.

	Assessment Guide The following skills and knowledge must be assessed as part of this unit: • Ability to understand and comply with enterprise policies and procedures in regard to client relationships, deposits required, payment methods and procedures, and placement of bookings • Ability to understand and apply principles of typical industry booking systems, procedures and records • Ability to undertake basic desktop research • General industry product knowledge • Understanding of the nature of relationships between different industry sectors • Client contact and questioning skills. **Linkages To Other Units** • Operate a computerised reservation system • Source and provide destination information and advice • Prepare and submit quotations • Access and retrieve computer-based data • Develop and update local knowledge • Use common business tools and technology • Develop and update tourism industry knowledge • Maintain product information inventory • Construct and apply tourism product research • Promote tourism products and services • Access and interpret product information.

	Critical Aspects of Assessment Evidence of the following is essential: • Understanding of host enterprise requirements for lodging requests with suppliers • Demonstrated ability to identify and record client requirements in relation to a nominated booking • Demonstrated ability to select the most appropriate supplier to meet identified client wants, needs and preferences in accordance with host enterprise requirements • Demonstrated ability to lodge requests for a nominated booking with one or more selected suppliers • Demonstrated ability to lodge formal booking with supplier for a nominated booking and record all processes and procedures related to that booking • Demonstrated ability to up-date client file on the basis of nominated payments made, adjustments to the initial booking and communications arising that relate to the booking • Demonstrated ability to finalise a nominated booking with a supplier on behalf of a designated client and process any final payments outstanding. **Context of Assessment** Assessment must ensure: Actual or simulated workplace application of systems and procedures to enable the booking and coordination of products and services from suppliers required to support service provision in a travel agency. **Resource Implications** Training and assessment must include interaction with actual suppliers, real or simulated clients and rebooking requirements, and actual systems and records; and access to relevant equipment to enable booking.

	Assessment Methods The following methods may be used to assess competency for this unit: • Observation of practical candidate performance • Simulation exercises • Case studies • Portfolio of records associated to booking and coordinating supplier services for a designated client/booking • Role plays • Oral and written questions • Third party reports completed by a supervisor • Project and assignment work. **Key Competencies in this Unit** *Level 1 = competence to undertake tasks effectively* *Level 2 = competence to manage tasks* *Level 3 = competence to use concepts for evaluating*

Key Competencies	Level	Examples
Collecting, organising and analysing information	2	Gather information from suppliers to develop information database
Communicating ideas and information	1	Determine client requirements; request information and confirmation from suppliers
Planning and organising activities	1	Schedule and coordinate booking requirements

	Working with others and in teams	2	Liaise with clients, co-workers and suppliers to enable service delivery
	Using mathematical ideas and techniques	1	Calculate costs and payments
	Solving problems	2	Obtain alternative suppliers where first-choice suppliers cannot meet requests
	Using technology	2	Use Internet to research information; use computerised reservation systems to communicate with suppliers

Oral questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Book and coordinate supplier services D2.TTA.CL2.04
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. What are three suppliers of travel and tourism products and services in your region that appeal to foreign clients?	❑	❑
2. What are examples of specific products and services sought by a couple seeking an adventure holiday in your region?	❑	❑

Questions	Response	
	PC	NYC
3. What are examples of operational arrangements to be determined with suppliers?	❑	❑
4. How would you gain tourism products and service information through direct contact with suppliers?	❑	❑
5. Why is it important to create client files?	❑	❑

Questions	Response	
	PC	NYC
6. What information would you like to gather from a client to identify their travel requirements?	❑	❑
7. What are considerations when selecting appropriate products and services to meet client requirements?	❑	❑
8. What information is normally contained with a quotation?	❑	❑

Questions	Response	
	PC	NYC
9. Why is it important to obtain authority from the client before making travel related bookings?	❑	❑
10. What is the purpose of a receipt? What information should be contained within a receipt?	❑	❑
11. Why is it important to keep client files accurate?	❑	❑

Questions	Response	
	PC	NYC
12. What are considerations when making requests for multiple services?	❑	❑
13. What are general considerations when securing bookings and costs from suppliers?	❑	❑
14. What information would need to be forwarded to suppliers to request and book flights?	❑	❑

Questions	Response	
	PC	NYC
15. Why is it important to obtain responses to your requests from suppliers for travel products and services in a timely manner?	❑	❑
16. Why is it important to obtain confirmation of bookings from suppliers?	❑	❑
17. Why would you need to seek alternate suppliers?	❑	❑

Questions	Response	
	PC	NYC
18. What are steps associated with recording lodgement of bookings?	❑	❑
19. What details must be recorded regarding products and services booked?	❑	❑
20. What needs to be considered when dispatching travel related documents to clients?	❑	❑

Questions	Response	
	PC	NYC
21. What are methods used to monitor client files?	❑	❑
22. What are considerations when scheduling payments to suppliers?	❑	❑
23. What are considerations when handling adjustments to client bookings?	❑	❑

Questions	Response	
	PC	NYC
24. What are the consequences of not paying suppliers to both your organisation and to clients?	❑	❑
25. How can you make client files 'transparent' so they can be understood by any sales person?	❑	❑
26. Why is it important to pass on final client information to suppliers?	❑	❑

Written questions

Book and coordinate supplier services – D2.TTA.CL2.04

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. What types of suppliers provide tourism product and services?

____
____
____
____
____
____

2. What are examples of attractions and theme parks in your region?

____
____
____
____
____
____

3. What are general travel and tourism products and services sought by customers?

____
____
____
____
____
____

4. What are examples of specific products and services sought by a family with small children, aged 3 and 6, for a holiday in your region?

5. What is the role of suppliers?

6. What are activities undertaken when identifying appropriate suppliers?

7. What are three sources of travel product and services information?

8. What are three examples of information contained within a client file?

9. What are activities associated with creating client files?

10. Explain the process of identifying client requirements.

11. What are activities associated with selecting suppliers of required products and services?

12. What is the definition of a quotation?

13. How can you obtain authority from a client to proceed with travel related bookings?

14. What are types of payments that clients can make to pay for travel services?

15. What are three reasons to update a client file?

16. What are methods used to forward requests to suppliers?

17. What are two examples of organisational requirements that must be considered when forwarding requests to suppliers?

18. What are examples of information to be confirmed with suppliers when making a booking for travel related products and services?

19. What information would you like to get from suppliers to identify their responses to your request for travel products and services?

20. What are two methods of requesting confirmation of bookings?

21. What can you do if there is an inability to provide products and services as originally requested?

22. What are considerations when recording information into a client file?

23. What are examples of records kept in a client file?

24. What are four examples of documents to be dispatched to clients relating to their travel arrangements?

25. What are activities undertaken to monitor client file and records?

26. What are examples of post-sale activities to be performed by travel staff?

27. What are three types of adjustments that can be made to client bookings?

28. What are activities associated with paying suppliers?

29. As a manager what are two tasks you would give to staff to ensure client files are maintained and are accurate?

30. What are considerations when notifying final client information?

Answers to written questions

Book and coordinate supplier services – D2.TTA.CL2.04

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. What types of suppliers provide tourism product and services?

- Airlines
- Cruise operators
- Railway operators
- Bus lines
- Car rental businesses
- Limousine hire
- Taxis
- Travel insurance providers
- Finance providers
- Currency exchange
- Conference and similar venues
- Interpreters
- Accommodation
- Attractions and Theme Parks
- Tour Operators
- Inbound Tour Wholesaler
- Outbound Tour Wholesaler
- Retail Travel Agents
- Local, regional and national information services
- Meetings and Events
- Ministries of Tourism
- Tourism Boards.

2. What are examples of attractions and theme parks in your region?

Answers will vary depending on region.

3. **What are general travel and tourism products and services sought by customers?**

- Flights
- Car hire
- Transfers
- Accommodation
- Entertainment
- Tours
- Cruises
- Entrances to attractions and sites
- Workshops, exhibitions, functions and events
- Insurance.

4. **What are examples of specific products and services sought by a family with small children, aged 3 and 6, for a holiday in your region?**

   Answers will vary depending on region.

5. **What is the role of suppliers?**

- Identify role of suppliers
- Selling destinations you need
- Selling transport you require
- Selling accommodation style you require
- Selling the appropriate level of comfort and inclusions your client needs
- Having competitive prices and offering value for money for your client
- Having a reputation for reliability, efficiency and easy payment
- Provide quality documentation
- Employ helpful and knowledgeable staff
- Pay competitive agent commission
- Have local representation.

6. What are activities undertaken when identifying appropriate suppliers?

- Identifying client requirements in terms of products and services
- Collecting information as to whom provides these products and services
- Identifying suitable suppliers
- Assessing alternatives against the identified requirements for the quotation
- Evaluating the alternatives against the given criteria for the quotation
- Accommodating host enterprise requirements in relation to the use of preferred suppliers, providers and carriers
- Aligning with established client preferences
- Determine and select suppliers, providers and carriers to be provided.

7. What are three sources of travel product and services information?

- Brochures/DVDs
- Hotel and accommodation guides and indexes
- Atlases, maps and encyclopaedias
- Travel guides
- Individual timetables
- Automated information systems
- Computerised Reservations Systems (CRS)
- Internal database of product suppliers and their details
- Supplier information
- International airline guides
- Travel Trade Yearbook
- Travel Information Manual (TIM)
- Passenger air tariff
- Trade press
- General print and electronic media
- Literature
- Educationals
- Networks and contacts
- Other organisations in the industry
- The internet
- Product familiarisations
- The internet, travel websites, travel advisor, blogs
- Travel companies product launches, travel shows and information nights.

8. What are three examples of information contained within a client file?

- Client file number
- Client details
- Client requirements
- Information sourced to date
- Information provided to clients to date
- Communication discussions
- Travel arrangements booked
- Associated financial transactions.

9. What are activities associated with creating client files?

- Preparing paper-based or electronic file
- Establishing and naming file for individual clients
- Incorporating previous client history into file
- Allocating specific agent to handle and deal with client
- Initiating nominated client and file records as required by the host enterprise.

10. Explain the process of identifying client requirements.

- Meeting with the client, including face-to-face meetings, over the telephone contact and electronic communications
- Identifying the need to coordinate and integrate services for the bookings
- Determining and negotiating individual client wants, needs and preferences
- Identifying relevant specifics that relate to the identified wants, needs and preferences.

11. What are activities associated with selecting suppliers of required products and services?

- Identify list of final products and services
- Identify suitable suppliers
- Complying with client requirements
- Ensuring availability of products and services
- Negotiating agreements with suppliers, carriers and providers.

12. What is the definition of a quotation?

A quotation is a <u>summary of costs for products and services</u> which are provided by the travel agent to potential customers who wish to travel.

13. How can you obtain authority from a client to proceed with travel related bookings?

- Verbal notification from client
- Signed authority on standard organisational form.

14. What are types of payments that clients can make to pay for travel services?

- Types of payments
- Credit card
- Cash, personal, business or traveller's cheque
- Direct debit, electronic funds transfer
- Invoice/account
- Telephone payment
- E-mail or other electronic transmission.

15. What are three reasons to update a client file?

- Adding confirmations and other responses from suppliers
- Adding communications from client
- Including documents and records relating to amendments and adjustments to initial request/booking
- Up-dating financial status of client file
- Receiving, processing and recording payments
- Generating and issuing invoices and credit notes for changed arrangements.

16. What are methods used to forward requests to suppliers?

- Sending hard copy requests
- Making verbal requests
- Lodging electronic requests.

17. What are two examples of organisational requirements that must be considered when forwarding requests to suppliers?

- Scope of authority limitations
- Designated person authorities for nominated suppliers
- Volume and value consideration related to booking
- Method of lodgement
- Timing requirements.

18. What are examples of information to be confirmed with suppliers when making a booking for travel related products and services?

- The name of the supplier, wholesaler, tour operator
- The date, time and name of the person providing the booking
- The detail of the various products or service
- Price
- Booking reference number.

19. What information would you like to get from suppliers to identify their responses to your request for travel products and services?

- Receipt of request
- Confirmations of ability to supply products and services as requested
- Responses regarding the inability to supply products and services as requested.

20. What are two methods of requesting confirmation of bookings?

- CRS booking status updates
- Courier (as an updated invoice)
- Online booking procedures
- Facsimile
- Email (as an updated invoice or message)
- Mail
- Telephone.

21. What can you do if there is an inability to provide products and services as originally requested?

- Source alternate suppliers with similar products and services
- Make amendments to the original request with original suppliers to the satisfaction of the client.

22. What are considerations when recording information into a client file?

- Following the user instructions that apply to the computer system in use
- Completing all required fields
- Observing all security and privacy protocols
- Verifying that all required entries have been made.

23. What are examples of records kept in a client file?

- Quotations
- Requests for information
- Confirmations
- Orders lodged
- Price lists and other targeted information provided by suppliers.

24. What are four examples of documents to be dispatched to clients relating to their travel arrangements?

Answers will vary.

25. What are activities undertaken to monitor client file and records?

- Confirming that responses have been received from suppliers as anticipated
- Verifying information required from client has been received as required
- Coordinating client requirements and availability or provision of services
- Checking that payments promised by client have been received
- Following-up on outstanding issues as required.

26. What are examples of post-sale activities to be performed by travel staff?

- Make the reservations
- Up-dating details by schedules timelines
- Making payments at scheduled times
- Balance the finances, client has paid the correct amount and it has been dispersed to suppliers, wholesalers and operators
- Providing confirmation by set dates
- Final detailed itinerary
- Check final documentation
- Issuing document, tickets and vouchers on nominated dates
- Flight reservations have been confirmed
- Any changes to the itinerary have been advised to the customer
- Monitor changes to file after the passenger has departed.

27. What are three types of adjustments that can be made to client bookings?

Adjustments may include:

- Instructions received from client
- Cancellation of booking
- Change of date or time
- Change of location, venue or destination
- Re-selection of available options
- Reduction or increase in booking numbers.

28. What are activities associated with paying suppliers?

- Taking into account monies already paid
- Requesting payment from the accounts department, or self-administering payment
- Conforming to approved or required methods of payment
- Ensuring timeliness of payment
- Completing relevant documentation
- Adding appropriate notifications into client file and up-dating records as required
- Factoring-in commissions due to the host enterprise.

29. As a manager what are two tasks you would give to staff to ensure client files are maintained and are accurate?

Answers will vary.

30. What are considerations when notifying final client information?

- Complying with standard industry terms and conditions
- Complying with specific requirements of individual suppliers
- Providing final numbers for group booking
- Providing arrival and departure dates and times for all transportation types relevant to the products and services required
- Providing final name and rooming lists
- Providing details of tourist guides, tour managers, and crew accompanying clients.

Observation checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Book and coordinate supplier services D2.TTA.CL2.04
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Identify suppliers of products and services b) Identify client booking requirements c) Request products and services from supplier d) Maintain client file e) Process final booking details for products and services 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1: Identify suppliers of products and services		
Identify suppliers used by the host enterprise	❑	❑
Identify products and services purchased from suppliers	❑	❑
Identify operational requirements relating to the selection and use of suppliers	❑	❑
Locate and become familiar with sources of information and resources, in relation to suppliers, services and products	❑	❑

Did the candidate	Yes	No
Element 2: Identify client booking requirements		
Create client file	❑	❑
Identify specific client requirements for supplier services	❑	❑
Determine and select most appropriate supplier to meet identified client requirements	❑	❑
Prepare and supply quotation to client	❑	❑
Confirm authority to proceed from client	❑	❑
Obtain payment from client	❑	❑
Update client file	❑	❑
Element 3: Request products and services from supplier		
Forward request/s to selected supplier/s	❑	❑
Comply with organisational requirements in relation to placement of requests for bookings of products and services	❑	❑
Supply, clarify and confirm all information related to required products and services	❑	❑
Inform suppliers of required response to requests from supplier/s	❑	❑
Lodge or confirm formal and official booking/s	❑	❑
Seek, and lodge requests with, alternative suppliers as required	❑	❑
Element 4: Maintain client file		
Record lodgement of booking in client file	❑	❑
Capture and store relevant records in client file	❑	❑
Issue notification and documents to client	❑	❑
Monitor client file	❑	❑
Meet requirements of scheduled future action	❑	❑

Did the candidate	Yes	No
Element 5: Process final booking details for products and services		
Notify supplier of required adjustments to initial booking	❑	❑
Pay supplier in accordance with established and/or agreed terms and conditions	❑	❑
Up-date client file	❑	❑
Inform supplier of final client information	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor
Strengths:
Improvements needed:
General comments:

Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		**Contact no:**	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:*__________________________________ *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Book and coordinate supplier services D2.TTA.CL2.04		
The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence. Please answer these questions as a record of their performance while working with you. Thank you for your time.			

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 1: Identify suppliers of products and services			
Identify suppliers used by the host enterprise	❑	❑	❑
Identify products and services purchased from suppliers	❑	❑	❑
Identify operational requirements relating to the selection and use of suppliers	❑	❑	❑
Locate and become familiar with sources of information and resources, in relation to suppliers, services and products	❑	❑	❑
Element 2: Identify client booking requirements			
Create client file	❑	❑	❑
Identify specific client requirements for supplier services	❑	❑	❑
Determine and select most appropriate supplier to meet identified client requirements	❑	❑	❑
Prepare and supply quotation to client	❑	❑	❑
Confirm authority to proceed from client	❑	❑	❑
Obtain payment from client	❑	❑	❑
Update client file	❑	❑	❑

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 3: Request products and services from supplier			
Forward request/s to selected supplier/s	❑	❑	❑
Comply with organisational requirements in relation to placement of requests for bookings of products and services	❑	❑	❑
Supply, clarify and confirm all information related to required products and services	❑	❑	❑
Inform suppliers of required response to requests from supplier/s	❑	❑	❑
Lodge or confirm formal and official booking/s	❑	❑	❑
Seek, and lodge requests with, alternative suppliers as required	❑	❑	❑
Element 4: Maintain client file			
Record lodgement of booking in client file	❑	❑	❑
Capture and store relevant records in client file	❑	❑	❑
Issue notification and documents to client	❑	❑	❑
Monitor client file	❑	❑	❑
Meet requirements of scheduled future action	❑	❑	❑
Element 5: Process final booking details for products and services			
Notify supplier of required adjustments to initial booking	❑	❑	❑
Pay supplier in accordance with established and/or agreed terms and conditions	❑	❑	❑
Up-date client file	❑	❑	❑
Inform supplier of final client information	❑	❑	❑

Comments/feedback from Third Party to Trainer/Assessor:	
Third party signature:	**Date:**
Send to:	

Competency recording sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Book and coordinate supplier services	D2.TTA.CL2.04
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Identify suppliers of products and services						
Identify suppliers used by the host enterprise						
Identify products and services purchased from suppliers						
Identify operational requirements relating to the selection and use of suppliers						
Locate and become familiar with sources of information and resources, in relation to suppliers, services and products						
Element 2: Identify client booking requirements						
Create client file						
Identify specific client requirements for supplier services						
Determine and select most appropriate supplier to meet identified client requirements						
Prepare and supply quotation to client						
Confirm authority to proceed from client						
Obtain payment from client						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Update client file						
Element 3: Request products and services from supplier						
Forward request/s to selected supplier/s						
Comply with organisational requirements in relation to placement of requests for bookings of products and services						
Supply, clarify and confirm all information related to required products and services						
Inform suppliers of required response to requests from supplier/s						
Lodge or confirm formal and official booking/s						
Seek, and lodge requests with, alternative suppliers as required						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 4: Maintain client file						
Record lodgement of booking in client file						
Capture and store relevant records in client file						
Issue notification and documents to client						
Monitor client file						
Meet requirements of scheduled future action						
Element 5: Process final booking details for products and services						
Notify supplier of required adjustments to initial booking						
Pay supplier in accordance with established and/or agreed terms and conditions						
Up-date client file						
Inform supplier of final client information						

Candidate signature:		**Date:**	
Assessor signature:		**Date:**	

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