

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	
<p>Element 1: Identify suppliers of products and services</p> <p>1.1 Identify <i>suppliers</i> used by the host enterprise</p> <p>1.2 Identify <i>products and services</i> purchased from suppliers</p> <p>1.3 Identify <i>operational requirements relating to the selection and use of suppliers</i></p> <p>1.4 Locate and become familiar with <i>sources of information and resources</i>, in relation to suppliers, services and products</p> <p>Element 2: Identify client booking requirements</p> <p>2.1 <i>Create client file</i></p> <p>2.2 <i>Identify specific client requirements for supplier services</i></p>	<p>Unit Variables</p> <p>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.</p> <p>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:</p> <ol style="list-style-type: none"> 1. Front Office 2. Housekeeping 3. Food and Beverage Service 4. Food Production 5. Travel Agencies 6. Tour Operation <p><i>Suppliers may relate to:</i></p> <ul style="list-style-type: none"> • Internal and external suppliers • Domestic and international suppliers 	

<p>2.3 Determine and select most appropriate supplier to meet identified client requirements</p> <p>2.4 Prepare and supply <i>quotation to client</i></p> <p>2.5 Confirm <i>authority to proceed</i> from client</p> <p>2.6 Obtain <i>payment</i> from client</p> <p>2.7 <i>Update client file</i></p> <p>Element 3: Request products and services from supplier</p> <p>3.1 <i>Forward request/s</i> to selected supplier/s</p> <p>3.2 Comply with <i>organisational requirements in relation to placement of requests for bookings of products and services</i></p> <p>3.3 Supply, clarify and confirm all <i>information related to required products and services</i></p> <p>3.4 Inform suppliers of required response to requests from supplier/s</p> <p>3.5 Lodge or confirm formal and official <i>booking/s</i></p> <p>3.6 Seek, and lodge requests with, alternative suppliers as required</p> <p>Element 4: Maintain client file</p> <p>4.1 <i>Record lodgement of booking</i> in client file</p> <p>4.2 Capture and store <i>relevant records</i> in client file</p> <p>4.3 Issue <i>notification and documents</i> to client</p>	<ul style="list-style-type: none"> • Company name • Contact details, including telephone, fax, e-mail and office location/s • Names of key staff/contacts within the supplier business, including position held and areas of expertise. <p><i>Products and services</i> may include:</p> <ul style="list-style-type: none"> • 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. <p><i>Operational requirements relating to the selection and use of suppliers</i> may include:</p> <ul style="list-style-type: none"> • 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
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<p>4.4 <i>Monitor client file</i></p> <p>4.5 Meet requirements of <i>scheduled future action</i></p> <p>Element 5: Process final booking details for products and services</p> <p>5.1 Notify supplier of required <i>adjustments</i> to initial booking</p> <p>5.2 <i>Pay supplier</i> in accordance with established and/or agreed terms and conditions</p> <p>5.3 <i>Up-date client file</i></p> <p>5.4 Inform supplier of final <i>client information</i></p>	<ul style="list-style-type: none"> • Individual scope of authority for lodging requests, bookings and spending money on behalf of the host enterprise. <p><i>Sources of information</i> may include:</p> <ul style="list-style-type: none"> • Internal business sources, including databases and reservation systems either manual or computerised • Direct contact with: <ul style="list-style-type: none"> ▪ 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. <p><i>Resources</i> may include:</p> <ul style="list-style-type: none"> • Computerised reservation system, including computerised data/information contained within the system • Airline, carrier and provider guides • Schedules/timetables
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- 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