

Competency Standard

UNIT TITLE: CONSTRUCT AND TICKET A NON-AIR TRAVEL PLAN		NOMINAL HOURS: 50
UNIT NUMBER: D2.TTA.CL2.05		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to process client requirements to provide tickets and produce an itinerary for travel that does not include air travel.		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Confirm client information and requirements for travel</p> <p>1.1 Capture and/or confirm <i>client details</i></p> <p>1.2 Confirm <i>existing arrangements</i> relating to the travel plan</p> <p>1.3 Identify and confirm <i>needs and preferences of client</i></p> <p>1.4 Identify and access <i>appropriate resources and sources of information</i> to enable processing of client requirements</p> <p>1.5 Identify <i>booking deadlines</i></p> <p>Element 2: Process travel plan requirements</p> <p>2.1 Select carriers and suppliers to accommodate identified client requirements</p> <p>3.1 Up-date <i>internal records</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 the monitoring of staff performance 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>Client details</i> refers to:</p> <ul style="list-style-type: none"> • Name • Age 	

<p>2.2 Construct <i>costed draft itinerary</i> in accordance with host enterprise <i>operational requirements</i> and identified client requirements</p> <p>2.3 Obtain approval and <i>authority to proceed</i> with <i>booking/s</i> from client</p> <p>2.4 <i>Book approved itinerary</i> with nominated carriers and suppliers</p> <p>2.5 Obtain <i>payment from client</i>, as required</p> <p>Element 3: Process travel documentation and payment</p> <p>3.2 <i>Prepare required travel documentation</i> to support approved client booking</p> <p>3.3 <i>Process payment/s by client</i></p> <p>3.4 <i>Issue travel documentation</i></p> <p>3.5 <i>Pay supplier</i></p>	<ul style="list-style-type: none"> • Home and/or business address, including postal and street • Address for payment and delivery of documents • Contact details • Agent details, where applicable • Times when client is available and/or unavailable • Preferred contact times of the day • Associated groups or other bodies client is a member of or connected to for purposes of determining relevant preferential treatment and/or discounts • Previous client history, including information on system databases and client management systems. <p><i>Existing arrangements</i> may include:</p> <ul style="list-style-type: none"> • Existing reservation data • Products and/or services already sold or confirmed as part of the current travel plan • Identification of confirmed bookings held for client for current travel plan • Confirmation of quotations supplied to client for products and services • Finalisation of outstanding issues and financial matters with clients. <p><i>Needs and preferences of client</i> may relate to:</p> <ul style="list-style-type: none"> • Packages • Personalised travel plans • Budget limitations • Timing and duration • Number of travellers, including considerations applicable to groups, families and individuals
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	<ul style="list-style-type: none"> • Destinations • Preferred carriers and suppliers, including preferences for: <ul style="list-style-type: none"> ▪ Methods of travel, including car rental, coaches, trains and other options unique to individual destinations, countries and locations ▪ Type and style of accommodation ▪ Attractions, sight-seeing trips and events • Quotations and advice previously supplied to client • Existing arrangements for the travel plan that have already been finalised, including arrangements made by the client and arrangements made by the host enterprise or other agencies. <p><i>Appropriate resources and sources of information may include:</i></p> <ul style="list-style-type: none"> • Computerised reservation system, including computerised data/information contained within the system • Carrier, provider and visa guides • Schedules/timetables • Fare and tariff manuals, including contracts and agreements with suppliers • Brochures • Information kits • Catalogues and price lists • Personal knowledge and experience • Internal business sources, including undertaking basic research using databases and reservation systems either manual or computerised • Direct contact with: <ul style="list-style-type: none"> ▪ Travel suppliers, including cruise operators, railway operators, bus lines, car rental businesses, limousine hire, taxis
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	<ul style="list-style-type: none"> ▪ Suppliers and providers of support and ancillary services, including travel insurance providers, finance providers, currency exchange, conference and similar venues, interpreters ▪ Tour operators and wholesalers ▪ Travel agencies and associations ▪ Peak travel bodies ▪ Government tourism industry bodies and authorities, including domestic and international bodies <ul style="list-style-type: none"> • 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>Booking deadlines</i> refers to:</p> <ul style="list-style-type: none"> • Carrier guidelines • Advance notice timelines required by carriers and suppliers • Client needs • Relationship between cost and advanced booking dates/timelines. <p><i>Costed draft itinerary</i> relates to:</p> <ul style="list-style-type: none"> • Name and number of travellers and/or passenger/s, including indication of adults and children, where applicable • Day and date of travel • From and to destinations • Name of carrier and identification of chosen option, including seat allocation, where applicable
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- Departure and arrival times
- Fare, taxes, fees and charges, including sub-totals and total using basic calculations
- Deposit and/or full payments required, if applicable
- Verification of connections and times, where applicable.

Operational requirements relates to:

- Carrier and supplier guidelines
- Regulatory requirements
- Host enterprise requirements
- Peak body requirements and procedures, where applicable, including fare construction rules, if applicable
- Use of correct documentation and/or computer screens and system information fields.

Authority to proceed may include:

- Verbal notification from client
- Signed authority on standard organisational form
- Explanation of relevant terms and conditions that attach to bookings.

Booking/s may include:

- A single product and/or service
- Multiple products and/or services comprising a complete itinerary
- Individuals and groups
- Guests and delegates
- One-off touring arrangements
- Series tours

- Incentive tours
- Meetings and conferences
- Payment of deposit or full payment for products and services.

Book approved itinerary may include:

- Placing requests with carriers and suppliers
- Obtaining confirmation of bookings
- Operating computerised reservation systems
- Seeking and booking through alternative carriers and suppliers where initially selected carriers and suppliers are unable to accommodate requests/bookings.

Payment from client may include:

- Credit card
- Cash, personal, business or traveller's cheque
- Direct debit, such as electronic funds transfer
- Invoice/account
- Telephone payment
- E-mail, or other electronic transmission
- Payment of deposits and full payment for itinerary.

Prepare required travel documentation can relate to internal and external requirements and may include the following activities and documents:

- Activities:
 - Ensuring accuracy of all entries and calculations
 - Verifying all charges and discounts involved

	<ul style="list-style-type: none">▪ Completing documentation fully and in accordance with host enterprise operational requirements▪ Ensuring timely completion of all required documents• Documents:<ul style="list-style-type: none">▪ Client and passenger itineraries▪ Vouchers, including those for accommodation, cruise, tour, entries, vehicle, tourism products and services▪ Confirmation vouchers and letters, including meeting and/or event confirmation letters, registrations and delegate information packs/kits▪ Commission vouchers▪ Travel insurance documentation▪ Visa forms, passport forms and visas▪ Tickets, including coach and other transportation options▪ Requests for traveller's cheques▪ Briefing notes for crews and staff▪ Rooming and passenger lists. <p><i>Process payment/s by client may include:</i></p> <ul style="list-style-type: none">• Accepting payment based on standard host enterprise, industry or carrier/supplier requirements• Issuing receipt• Recording payment of deposit on internal documentation• Advising client of amount outstanding, where applicable.
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Issue of travel documentation will depend on booking type as well as host enterprise, carrier and supplier requirements and may include:

- Issuing documentation to clients and passengers
- Providing documentation to accounts department
- Placing copies of documents in client file
- Providing documentation to carriers and suppliers
- Supplying documentation to operational staff, including tour leaders, tour guides, drivers
- Providing documentation to relevant authorities and government bodies, as applicable.

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.

Internal records may include:

- Client files
- Invoices
- Receipts
- Computerised system screens and fields
- 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.

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 operational requirements for developing itineraries, costing fares, processing payments, issuing tickets and completing documentation and records
- Ability to use basic research techniques
- Ability to perform basic arithmetic calculations
- Detailed knowledge of itinerary construction
- Detailed knowledge of ticketing rules appropriate to the needs of the host enterprise
- Ability to identify, access and apply travel-related resources
- Ability to identify and interpret carrier and other travel codes
- General knowledge of carrier and supplier regulations and requirements
- Ability to convert currencies
- Ability to process payments.

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
- Access and interpret product information
- Book and co-ordinate supplier services.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of organisational, carrier and supplier requirements in relation to travel plan construction and ticketing
- Demonstrated ability to identify and confirm the arrangements that have already been made and the requirements that exist in relation to the development of a travel plan for a nominated client
- Demonstrated ability to develop a costed draft itinerary that accommodates the identified needs of a client and receives their approval for proceeding with the booking
- Demonstrated ability to book a nominated travel plan/itinerary and respond effectively to problems that arise during the booking process so that identified client need is met
- Demonstrated ability to prepare and distribute necessary travel documentation to support the legal and effective undertaking of a nominated travel plan that meets identified client need
- Demonstrated ability to process client payment/s and up-date internal records and client files to reflect such payment.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace application of travel plan construction in a realistic office environment
- Access to equipment and booking systems.

Resource Implications

Training and assessment must include actual computerised reservation and ancillary systems, real travel and product/service-related documentation or screens, real travel and product/service-related resource material and actual or simulated travel plans for use as the basis of developing itineraries and issuing tickets.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Portfolio of travel-related documentation and internal business records
- Case studies
- Simulated exercises
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor or customer
- Project and assignment work.

Key Competencies in this Unit		
<i>Level 1 = competence to undertake tasks effectively</i>		
<i>Level 2 = competence to manage tasks</i>		
<i>Level 3 = competence to use concepts for evaluating</i>		
Key Competencies	Level	Examples
Collecting, organising and analysing information	1	Gather product and services information and resources to enable processing of client travel plan
Communicating ideas and information	1	Explain itineraries and supporting documentation to clients; explain client requirements to carriers
Planning and organising activities	1	Arrange payments from client for itinerary; arrange payments to carriers and suppliers
Working with others and in teams	1	Liaise with industry partners and other staff to access and identify relevant information as required by the client
Using mathematical ideas and techniques	1	Calculate costs and payments
Solving problems	1	Source alternatives for client that enable attainment of identified requirements
Using technology	1	Research and access information via the Internet; use computerised reservation systems to communicate with carriers and suppliers