



# Book and coordinate supplier services

D2.TTA.CL2.04

Trainer Guide





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William  
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Specialist centre  
for foods, tourism  
& hospitality



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# Table of contents

Competency Based Training (CBT) and assessment – An introduction for trainers .....	1
Competency standard.....	11
Notes and PowerPoint slides .....	25
Recommended training equipment .....	187
Instructions for Trainers for using PowerPoint – Presenter View.....	189
Appendix – ASEAN acronyms .....	191



# Competency Based Training (CBT) and assessment – An introduction for trainers

## Competency

Competency refers to the ability to perform particular tasks and duties to the standard of performance expected in the workplace.

Competency requires the application of specified knowledge, skills and attitudes relevant to effective participation, consistently over time and in the workplace environment.

The essential skills and knowledge are either identified separately or combined.

*Knowledge* identifies what a person needs to know to perform the work in an informed and effective manner.

*Skills* describe the application of knowledge to situations where understanding is converted into a workplace outcome.

*Attitude* describes the founding reasons behind the need for certain knowledge or why skills are performed in a specified manner.

Competency covers all aspects of workplace performance and involves:

- Performing individual tasks
- Managing a range of different tasks
- Responding to contingencies or breakdowns
- Dealing with the responsibilities of the workplace
- Working with others.

## ***Unit of competency***

Like with any training qualification or program, a range of subject topics are identified that focus on the ability in a certain work area, responsibility or function.

Each manual focuses on a specific unit of competency that applies in the hospitality workplace.

In this manual a unit of competency is identified as a 'unit'.

Each unit of competency identifies a discrete workplace requirement and includes:

- Knowledge and skills that underpin competency
- Language, literacy and numeracy
- Occupational safety and health requirements.

Each unit of competency must be adhered to in training and assessment to ensure consistency of outcomes.

### ***Element of competency***

An element of competency describes the essential outcomes within a unit of competency.

The elements of competency are the basic building blocks of the unit of competency. They describe in terms of outcomes the significant functions and tasks that make up the competency.

In this manual elements of competency are identified as an 'element'.

### ***Performance criteria***

Performance criteria indicate the standard of performance that is required to demonstrate achievement within an element of competency. The standards reflect identified industry skill needs.

Performance criteria will be made up of certain specified skills, knowledge and attitudes.

### ***Learning***

For the purpose of this manual learning incorporates two key activities:

- Training
- Assessment.

Both of these activities will be discussed in detail in this introduction.

Today training and assessment can be delivered in a variety of ways. It may be provided to participants:

- On-the-job – in the workplace
- Off-the-job – at an educational institution or dedicated training environment
- As a combination of these two options.

No longer is it necessary for learners to be absent from the workplace for long periods of time in order to obtain recognised and accredited qualifications.

### ***Learning approaches***

This manual will identify two avenues to facilitate learning:

#### **Competency Based Training (CBT)**

This is the strategy of developing a participant's competency.

Educational institutions utilise a range of training strategies to ensure that participants are able to gain the knowledge and skills required for successful:

- Completion of the training program or qualification
- Implementation in the workplace.

The strategies selected should be chosen based on suitability and the learning styles of participants.



## Competency Based Assessment (CBA)

This is the strategy of assessing competency of a participant.

Educational institutions utilise a range of assessment strategies to ensure that participants are assessed in a manner that demonstrates validity, fairness, reliability, flexibility and fairness of assessment processes.

### ***Flexibility in learning***

It is important to note that flexibility in training and assessment strategies is required to meet the needs of participants who may have learning difficulties. The strategies used will vary, taking into account the needs of individual participants with learning difficulties. However they will be applied in a manner which does not discriminate against the participant or the participant body as a whole.

### ***Catering for participant diversity***

Participants have diverse backgrounds, needs and interests. When planning training and assessment activities to cater for individual differences, trainers and assessors should:

- Consider individuals' experiences, learning styles and interests
- Develop questions and activities that are aimed at different levels of ability
- Modify the expectations for some participants
- Provide opportunities for a variety of forms of participation, such as individual, pair and small group activities
- Assess participants based on individual progress and outcomes.

The diversity among participants also provides a good reason for building up a learning community in which participants support each other's learning.

### ***Participant centred learning***

This involves taking into account structuring training and assessment that:

- *Builds on strengths* – Training environments need to demonstrate the many positive features of local participants (such as the attribution of academic success to effort, and the social nature of achievement motivation) and of their trainers (such as a strong emphasis on subject disciplines and moral responsibility). These strengths and uniqueness of local participants and trainers should be acknowledged and treasured
- *Acknowledges prior knowledge and experience* – The learning activities should be planned with participants' prior knowledge and experience in mind
- *Understands learning objectives* – Each learning activity should have clear learning objectives and participants should be informed of them at the outset. Trainers should also be clear about the purpose of assignments and explain their significance to participants
- *Teaches for understanding* – The pedagogies chosen should aim at enabling participants to act and think flexibly with what they know
- *Teaches for independent learning* – Generic skills and reflection should be nurtured through learning activities in appropriate contexts of the curriculum. Participants should be encouraged to take responsibility for their own learning
- *Enhances motivation* – Learning is most effective when participants are motivated. Various strategies should be used to arouse the interest of participants

- *Makes effective use of resources* – A variety of teaching resources can be employed as tools for learning
- *Maximises engagement* – In conducting learning activities, it is important for the minds of participants to be actively engaged
- *Aligns assessment with learning and teaching* – Feedback and assessment should be an integral part of learning and teaching
- *Caters for learner diversity* – Trainers should be aware that participants have different characteristics and strengths and try to nurture these rather than impose a standard set of expectations.

### **Active learning**

The goal of nurturing independent learning in participants does not imply that they always have to work in isolation or solely in a classroom. On the contrary, the construction of knowledge in tourism and hospitality studies can often best be carried out in collaboration with others in the field. Sharing experiences, insights and views on issues of common concern, and working together to collect information through conducting investigative studies in the field (active learning) can contribute a lot to their eventual success.

Active learning has an important part to play in fostering a sense of community in the class. First, to operate successfully, a learning community requires an ethos of acceptance and a sense of trust among participants, and between them and their trainers. Trainers can help to foster acceptance and trust through encouragement and personal example, and by allowing participants to take risks as they explore and articulate their views, however immature these may appear to be. Participants also come to realise that their classmates (and their trainers) are partners in learning and solving.

Trainers can also encourage cooperative learning by designing appropriate group learning tasks, which include, for example, collecting background information, conducting small-scale surveys, or producing media presentations on certain issues and themes. Participants need to be reminded that, while they should work towards successful completion of the field tasks, developing positive peer relationships in the process is an important objective of all group work.

## **Competency Based Training (CBT)**

### **Principle of Competency Based Training**

Competency based training is aimed at developing the knowledge, skills and attitudes of participants, through a variety of training tools.

### **Training strategies**

The aims of this curriculum are to enable participants to:

- Undertake a variety of subject courses that are relevant to industry in the current environment
- Learn current industry skills, information and trends relevant to industry
- Learn through a range of practical and theoretical approaches
- Be able to identify, explore and solve issues in a productive manner

- Be able to become confident, equipped and flexible managers of the future
- Be 'job ready' and a valuable employee in the industry upon graduation of any qualification level.

To ensure participants are able to gain the knowledge and skills required to meet competency in each unit of competency in the qualification, a range of training delivery modes are used.

### **Types of training**

In choosing learning and teaching strategies, trainers should take into account the practical, complex and multi-disciplinary nature of the subject area, as well as their participant's prior knowledge, learning styles and abilities.

Training outcomes can be attained by utilising one or more delivery methods:

#### ***Lecture/tutorial***

This is a common method of training involving transfer of information from the trainer to the participants. It is an effective approach to introduce new concepts or information to the learners and also to build upon the existing knowledge. The listener is expected to reflect on the subject and seek clarifications on the doubts.

#### ***Demonstration***

Demonstration is a very effective training method that involves a trainer showing a participant how to perform a task or activity. Through a visual demonstration, trainers may also explain reasoning behind certain actions or provide supplementary information to help facilitate understanding.

#### ***Group discussions***

Brainstorming in which all the members in a group express their ideas, views and opinions on a given topic. It is a free flow and exchange of knowledge among the participants and the trainer. The discussion is carried out by the group on the basis of their own experience, perceptions and values. This will facilitate acquiring new knowledge. When everybody is expected to participate in the group discussion, even the introverted persons will also get stimulated and try to articulate their feelings.

The ideas that emerge in the discussions should be noted down and presentations are to be made by the groups. Sometimes consensus needs to be arrived at on a given topic. Group discussions are to be held under the moderation of a leader guided by the trainer. Group discussion technique triggers thinking process, encourages interactions and enhances communication skills.

#### ***Role play***

This is a common and very effective method of bringing into the classroom real life situations, which may not otherwise be possible. Participants are made to enact a particular role so as to give a real feel of the roles they may be called upon to play. This enables participants to understand the behaviour of others as well as their own emotions and feelings. The instructor must brief the role players on what is expected of them. The role player may either be given a ready-made script, which they can memorise and enact, or they may be required to develop their own scripts around a given situation. This technique is extremely useful in understanding creative selling techniques and human relations. It can be entertaining and energising and it helps the reserved and less literate to express their feelings.

### ***Simulation games***

When trainees need to become aware of something that they have not been conscious of, simulations can be a useful mechanism. Simulation games are a method based on "here and now" experience shared by all the participants. The games focus on the participation of the trainees and their willingness to share their ideas with others. A "near real life" situation is created providing an opportunity to which they apply themselves by adopting certain behaviour. They then experience the impact of their behaviour on the situation. It is carried out to generate responses and reactions based on the real feelings of the participants, which are subsequently analysed by the trainer.

While use of simulation games can result in very effective learning, it needs considerable trainer competence to analyse the situations.

### ***Individual /group exercises***

Exercises are often introduced to find out how much the participant has assimilated. This method involves imparting instructions to participants on a particular subject through use of written exercises. In the group exercises, the entire class is divided into small groups, and members are asked to collaborate to arrive at a consensus or solution to a problem.

### ***Case study***

This is a training method that enables the trainer and the participant to experience a real life situation. It may be on account of events in the past or situations in the present, in which there may be one or more problems to be solved and decisions to be taken. The basic objective of a case study is to help participants diagnose, analyse and/or solve a particular problem and to make them internalise the critical inputs delivered in the training. Questions are generally given at the end of the case study to direct the participants and to stimulate their thinking towards possible solutions. Studies may be presented in written or verbal form.

### ***Field visit***

This involves a carefully planned visit or tour to a place of learning or interest. The idea is to give first-hand knowledge by personal observation of field situations, and to relate theory with practice. The emphasis is on observing, exploring, asking questions and understanding. The trainer should remember to brief the participants about what they should observe and about the customs and norms that need to be respected.

### ***Group presentation***

The participants are asked to work in groups and produce the results and findings of their group work to the members of another sub-group. By this method participants get a good picture of each other's views and perceptions on the topic and they are able to compare them with their own point of view. The pooling and sharing of findings enriches the discussion and learning process.

### ***Practice sessions***

This method is of paramount importance for skills training. Participants are provided with an opportunity to practice in a controlled situation what they have learnt. It could be real life or through a make-believe situation.

## **Games**

This is a group process and includes those methods that involve usually fun-based activity, aimed at conveying feelings and experiences, which are everyday in nature, and applying them within the game being played. A game has set rules and regulations, and may or may not include a competitive element. After the game is played, it is essential that the participants be debriefed and their lessons and experiences consolidated by the trainer.

## **Research**

Trainers may require learners to undertake research activities, including online research, to gather information or further understanding about a specific subject area.

## **Competency Based Assessment (CBA)**

### **Principle of Competency Based Assessment**

Competency based assessment is aimed at compiling a list of evidence that shows that a person is competent in a particular unit of competency.

Competencies are gained through a multitude of ways including:

- Training and development programs
- Formal education
- Life experience
- Apprenticeships
- On-the-job experience
- Self-help programs.

All of these together contribute to job competence in a person. Ultimately, assessors and participants work together, through the 'collection of evidence' in determining overall competence.

This evidence can be collected:

- Using different formats
- Using different people
- Collected over a period of time.

The assessor, who is ideally someone with considerable experience in the area being assessed, reviews the evidence and verifies the person as being competent or not.

### **Flexibility in assessment**

Whilst allocated assessment tools have been identified for this subject, all attempts are made to determine competency and suitable alternate assessment tools may be used, according to the requirements of the participant.

The assessment needs to be equitable for all participants, taking into account their cultural and linguistic needs.

Competency must be proven regardless of:

- Language
- Delivery Method
- Assessment Method.

### **Assessment objectives**

The assessment tools used for subjects are designed to determine competency against the 'elements of competency' and their associated 'performance criteria'.

The assessment tools are used to identify sufficient:

- a) Knowledge, including underpinning knowledge
- b) Skills
- c) Attitudes

Assessment tools are activities that trainees are required to undertake to prove participant competency in this subject.

All assessments must be completed satisfactorily for participants to obtain competence in this subject. There are no exceptions to this requirement, however, it is possible that in some cases several assessment items may be combined and assessed together.

### **Types of assessment**

#### *Allocated Assessment Tools*

There are a number of assessment tools that are used to determine competency in this subject:

- Work projects
- Written questions
- Oral questions
- Third Party Report
- Observation Checklist.

Instructions on how assessors should conduct these assessment methods are explained in the Assessment Manuals.

#### *Alternative assessment tools*

Whilst this subject has identified assessment tools, as indicated above, this does not restrict the assessor from using different assessment methods to measure the competency of a participant.

Evidence is simply proof that the assessor gathers to show participants can actually do what they are required to do.

Whilst there is a distinct requirement for participants to demonstrate competency, there are many and diverse sources of evidence available to the assessor.

Ongoing performance at work, as verified by a supervisor or physical evidence, can count towards assessment. Additionally, the assessor can talk to customers or work colleagues to gather evidence about performance.

A range of assessment methods to assess competency include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals: slides, audio tapes
- Case studies
- Log books
- Projects
- Role plays
- Group projects
- Group discussions
- Examinations.

### **Recognition of Prior Learning**

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.

Also known as a Skills Recognition Audit (SRA), this process is a learning and assessment pathway which encompasses:

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

### **Assessing competency**

As mentioned, 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. Traditionally in education, grades or marks were given to participants, dependent on how many questions the participant successfully answered in an assessment tool.

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'.



# Competency standard

<b>UNIT TITLE:</b> BOOK AND COORDINATE SUPPLIER SERVICES		<b>NOMINAL HOURS:</b> 30
<b>UNIT NUMBER:</b> D2.TTA.CL2.04		
<b>UNIT DESCRIPTOR:</b> 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.		
<b>ELEMENTS AND PERFORMANCE CRITERIA</b>	<b>UNIT VARIABLE AND ASSESSMENT GUIDE</b>	
<p><b>Element 1: Identify suppliers of products and services</b></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><b>Element 2: Identify client booking requirements</b></p> <p>2.1 <i>Create client file</i></p> <p>2.2 <i>Identify specific client requirements for supplier services</i></p> <p>2.3 Determine and select most appropriate supplier to meet identified client requirements</p>	<p><b>Unit Variables</b></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"> <li>1. Front Office</li> <li>2. Housekeeping</li> <li>3. Food and Beverage Service</li> <li>4. Food Production</li> <li>5. Travel Agencies</li> <li>6. Tour Operation</li> </ol> <p><i>Suppliers</i> may relate to:</p> <ul style="list-style-type: none"> <li>• Internal and external suppliers</li> <li>• Domestic and international suppliers</li> <li>• Company name</li> <li>• Contact details, including telephone, fax, e-mail and office location/s</li> </ul>	

<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><b>Element 3: Request products and services from supplier</b></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><b>Element 4: Maintain client file</b></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> <p>4.4 <i>Monitor client file</i></p> <p>4.5 Meet requirements of <i>scheduled future action</i></p>	<ul style="list-style-type: none"> <li>• Names of key staff/contacts within the supplier business, including position held and areas of expertise.</li> </ul> <p><i>Products and services</i> may include:</p> <ul style="list-style-type: none"> <li>• Transportation and transfers</li> <li>• Accommodation and entertainment</li> <li>• Tours and cruises</li> <li>• Entrances to attractions and sites</li> <li>• Tourist guiding services</li> <li>• Meals, functions and events</li> <li>• Workshops and exhibitions</li> <li>• Special items with corporate branding</li> <li>• Venue, speaker and equipment services</li> <li>• Special event consumable items</li> <li>• Catering.</li> </ul> <p><i>Operational requirements relating to the selection and use of suppliers</i> may include:</p> <ul style="list-style-type: none"> <li>• Contractual enterprise negotiated agreements</li> <li>• Preferred supplier status of companies</li> <li>• Contra-deal arrangements</li> <li>• Reciprocal business relationships</li> <li>• Nominated checks, comparisons and evaluations to be made prior to determining supplier to be used</li> <li>• Individual scope of authority for lodging requests, bookings and spending money on behalf of the host enterprise.</li> </ul>
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**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.

	<b>Assessment Methods</b>	
	The following methods may be used to assess competency for this unit:	
	<ul style="list-style-type: none"> <li>• Observation of practical candidate performance</li> <li>• Simulation exercises</li> <li>• Case studies</li> <li>• Portfolio of records associated to booking and coordinating supplier services for a designated client/booking</li> <li>• Role plays</li> <li>• Oral and written questions</li> <li>• Third party reports completed by a supervisor</li> <li>• Project and assignment work.</li> </ul>	
	<p><b>Key Competencies in this Unit</b></p> <p><i>Level 1 = competence to undertake tasks effectively</i></p> <p><i>Level 2 = competence to manage tasks</i></p> <p><i>Level 3 = competence to use concepts for evaluating</i></p>	
<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
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



# Notes and PowerPoint slides

Slide

## BOOK AND COORDINATE SUPPLIER SERVICES

D2.TTA.CL2.04



Slide 1

Slide No	Trainer Notes
1.	Trainer welcomes students to class.

## Slide

## Subject elements

This unit comprises five Elements:

- Identify suppliers of products and services
- Identify client booking requirements
- Request products and services from supplier
- Maintain client file
- Process final booking details for products and services



Slide 2

Slide No	Trainer Notes
2.	<p>Trainer advises this Unit comprises five Elements, as listed on the slide explaining:</p> <ul style="list-style-type: none"> <li>● Each Element comprises a number of Performance Criteria which will be identified throughout the class and explained in detail</li> <li>● Trainees can obtain more detail from their Trainee Manual</li> <li>● At times the course presents advice and information about various protocols but where their workplace requirements differ to what is presented, the workplace practices and standards, as well as policies and procedures must be observed.</li> </ul>



## Slide

## Assessment

Assessment for this unit may include:

- Oral questions
- Written questions
- Work projects
- Workplace observation of practical skills
- Practical exercises
- Formal report from supervisor



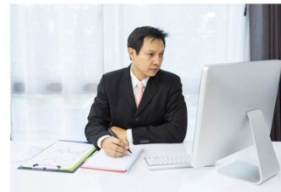
Slide 3

Slide No	Trainer Notes
3.	Trainer advises that assessment for this Unit may take several forms all of which are aimed at verifying they have achieved competency for the Unit as required. Trainer indicates the methods of assessment that will be applied to them for this Unit.

Slide

# Element 1:

## Identify suppliers of products and services



Slide 4

Slide No	Trainer Notes
----------	---------------

4.

Introduce topic.

**Class Activity – General Discussion**

Ask general questions:

- What is a supplier?
- What products and services do they provide?

## Slide

## Identify suppliers of products and services

Performance Criteria for this Element are:

- 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



Slide 5

Slide No	Trainer Notes
----------	---------------

5.

Trainer identifies the Performance Criteria for this Element, as listed on the slide.

## Slide

## Identify suppliers of products and services

### Identify travel and tourism suppliers

A key part of any travel agent's tasks is to provide a range of tourism products and services to their clients.

Your role will be to deal with a range of different suppliers of tourism products and services and then present options to prospective clients.

- What types of suppliers provide tourism product and services?



Slide 6

Slide No	Trainer Notes
6.	<p><b>Class Activity – General Discussion</b></p> <ul style="list-style-type: none"> <li>Discuss question in the slide.</li> </ul>

## Slide

## Identify suppliers of products and services

### Transportation

- Airlines
- Cruise operators
- Railway operators
- Bus lines
- Car rental businesses
- Limousine hire
- Taxis



Slide 7

Slide No	Trainer Notes
7.	<p><b>Class Activity – Identify examples of businesses of each category of supplier</b></p> <ul style="list-style-type: none"> <li>• Identify actual companies for each category.</li> </ul>

Slide

## Identify suppliers of products and services

### Suppliers and providers of support and ancillary services

- Travel insurance providers
- Finance providers
- Currency exchange
- Conference and similar venues
- Interpreters



Slide 8

Slide No	Trainer Notes
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8.	<b>Class Activity – Identify examples of businesses of each category of supplier</b> <ul style="list-style-type: none"><li>• Identify actual companies for each category.</li></ul>
----	---

## Slide

## Identify suppliers of products and services

### Accommodation

- Hotels and motels
- Guest houses
- Bed and breakfasts
- Caravan parks and camping grounds
- Resorts
- Time share properties
- Apartments, villas and cottages
- Conference and exhibition centres



Slide 9

Slide No	Trainer Notes
9.	<b>Class Activity – Identify examples of businesses of each category of supplier</b> <ul style="list-style-type: none"> <li>• Identify actual companies for each category.</li> </ul>

Slide

## Identify suppliers of products and services

### Attractions and Theme Parks

- Museums and galleries
- National parks, wildlife parks and gardens
- Theme parks
- Heritage sites and centres
- Sport and activity centres
- Aquarium and zoos



Slide 10

Slide No

Trainer Notes

10.

**Class Activity – Identify examples of businesses of each category of supplier**

- Identify actual companies for each category.



## Slide

## Identify suppliers of products and services

### Tour Operators

- A tour operator typically organises sightseeing tours and accommodation in a particular destination or region
- They act as a middle person between the Wholesaler and the Principal or Supplier of the product



Slide 11

Slide No	Trainer Notes
11.	<p><b>Class Activity – Identify examples of businesses of each category of supplier</b></p> <ul style="list-style-type: none"> <li>• Identify actual companies for each category.</li> </ul>

Slide

## Identify suppliers of products and services

### Inbound Tour Wholesaler

- An Inbound Tour Wholesaler packages products to form a trip for an overseas market travelling to a specific country

### Outbound Tour Wholesaler

- An Outbound Tour Wholesaler negotiates product from International Suppliers for clients in a specific travelling to an international destination



Slide 12

Slide No	Trainer Notes
12.	<b>Class Activity – Identify examples of businesses of each category of supplier</b> <ul style="list-style-type: none"><li>• Identify actual companies for each category.</li></ul>

## Slide

## Identify suppliers of products and services

### Retail Travel Agents

- A Retail Travel agent is the go-between between the client and the Wholesaler
- It is the Retail agent who obtains all the relevant details from a client to enable them to make a booking through a Wholesaler



Slide 13

Slide No	Trainer Notes
13.	<b>Class Activity – Identify examples of businesses of each category of supplier</b> <ul style="list-style-type: none"> <li>• Identify actual companies for each category.</li> </ul>

## Slide

## Identify suppliers of products and services

### Local, regional and national information services

- These information services exist to assist the public and Travel agents in obtaining information on a particular region from the experts
- This can be at a local, regional or national level



Slide 14

## Slide No

## Trainer Notes

14.

**Class Activity – Identify examples of businesses of each category of supplier**

- Identify actual companies for each category.

## Slide

## Identify suppliers of products and services

### MICE

- Meetings
- Incentives
- Conventions
- Exhibitions



Slide 15

Slide No	Trainer Notes
15.	<p><b>Class Activity – Identify examples of businesses of each category of supplier</b></p> <ul style="list-style-type: none"> <li>• Identify actual companies for each category.</li> </ul>

## Slide

## Identify suppliers of products and services

### Ministries of Tourism

- Each country within the ASEAN region will have dedicated government ministry specifically focused on the tourism industry
- Their role is to regulate and manage the industry



Slide 16

## Slide No

## Trainer Notes

16.

**Class Activity – Identify examples of businesses of each category of supplier**

- Identify actual companies for each category.

## Slide

## Identify suppliers of products and services

### Tourism Boards

- Coordinate the efforts of hotels, airlines and travel agents to develop the tourism industry of the country
- Initiate new marketing ideas to promote image abroad
- Provide travel agent licensing and tourist guide training
- Promote the development of infrastructure and tourist attractions
- Organise events to attract visitors

### COMPLETE ACTIVITY 1



Slide 17

Slide No	Trainer Notes
17.	<p><b>Class Activity – Identify examples of businesses of each category of supplier &amp; Activity</b></p> <ul style="list-style-type: none"> <li>• Identify actual companies for each category</li> <li>• Complete Activity 1.</li> </ul>

Slide

## Products and services purchased from suppliers

### General products and services sought by customers

- Flights
- Car hire
- Transfers
- Accommodation
- Entertainment
- Tours



Slide 18

Slide No	Trainer Notes
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18.	<b>Class Activity – Identify products and services</b> <ul style="list-style-type: none"><li>• Audience to prepare a list of possible products and services.</li></ul>
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## Slide

## Products and services purchased from suppliers

### General products and services sought by customers

- Cruises
- Entrances to attractions and sites
- Workshops, exhibitions, functions and events
- Insurance



### COMPLETE ACTIVITY 2

Slide 19

Slide No	Trainer Notes
19.	<p><b>Class Activity – Identify products and services &amp; Activity</b></p> <ul style="list-style-type: none"> <li>• Audience to prepare a list of possible products and services</li> <li>• Complete Activity 2.</li> </ul>

Slide

## Products and services purchased from suppliers

**Specific products and services sought by customer, based on needs**

- Adventure holidays, packages and tours
- Snow skiing holidays, packages and tours
- Specific age holidays, packages and tours
- Diving
- Cruising
- Rail
- Coach
- Sporting



Slide 20

Slide No	Trainer Notes
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20.	<b>Class Activity – Identify products and services</b> <ul style="list-style-type: none"><li>• Audience to prepare a list of possible products and services.</li></ul>
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## Slide

## Identify appropriate suppliers

**Specific products and services sought by customer, based on needs**

- ⦿ Safaris
- ⦿ Family
- ⦿ Overland treks/walking
- ⦿ Beach
- ⦿ Camping
- ⦿ Campervan/car rental
- ⦿ Wedding ceremonies



**COMPLETE ACTIVITY 3**

Slide 21

Slide No	Trainer Notes
21.	<p><b>Class Activity – Identify products and services &amp; Activity</b></p> <ul style="list-style-type: none"> <li>• Audience to prepare a list of possible products and services</li> <li>• Complete Activity 3.</li> </ul>

## Slide

## Select suppliers

### Importance of selecting suitable suppliers

Given that travel organisations will be purchasing tourism products and services from suppliers on a daily basis, it is essential that travel staff:

- Understand the role of suppliers
- Select appropriate suppliers
- Identify operational arrangements with suppliers



Slide 22

Slide No	Trainer Notes
22.	<b>Class Activity – Discuss importance of suppliers</b> <ul style="list-style-type: none"> <li>• Why is this important?</li> </ul>

## Slide

## Select 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



Slide 23

Slide No	Trainer Notes
23.	<p><b>Class Activity – Discuss role of suppliers</b></p> <ul style="list-style-type: none"> <li>• What activities are performed under each of these points?</li> <li>• How can you improve these individual roles?</li> </ul>

Slide

## Select suppliers

### Identify role of suppliers

- Having a reputation for reliability, efficiency and easy payment
- Provide quality documentation
- Employ helpful and knowledgeable staff
- Pay competitive agent commission
- Have local representation



Slide 24

Slide No	Trainer Notes
----------	---------------

24.

**Class Activity – Discuss role of suppliers**

- What activities are performed under each of these points?
- How can you improve these individual roles?

## Slide

## Select suppliers

### Activities in 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



Slide 25

Slide No	Trainer Notes
25.	<p><b>Class Activity – Discuss role of identifying suppliers</b></p> <ul style="list-style-type: none"> <li>• Discuss these activities</li> <li>• Trainer to provide personal experiences in selecting suppliers.</li> </ul>

## Slide

## Select suppliers

### Activities in identifying appropriate suppliers

- 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 and individual client market research data/feedback
- Determine and select suppliers, providers and carriers to be provided as options to the client



Slide 26

Slide No	Trainer Notes
26.	<p><b>Class Activity – Discuss role of identifying suppliers</b></p> <ul style="list-style-type: none"> <li>• Discuss these activities</li> <li>• Trainer to provide personal experiences in selecting suppliers.</li> </ul>



## Slide

## Select suppliers

### Identify operational arrangements with suppliers

Operational arrangements include, but not limited to identifying:

- Contractual enterprise negotiated agreements
- Preferred supplier status of companies
- Contra-deal arrangements
- Reciprocal business relationships
- Individual scope of authority for lodging requests, bookings and spending money on behalf of the host enterprise



Slide 27

Slide No	Trainer Notes
27.	<b>Class Activity – Discuss operational arrangements with suppliers</b> <ul style="list-style-type: none"> <li>• What other operational arrangements do you feel are important?</li> </ul>

## Slide

## Select suppliers

### Contents of an operational arrangement with suppliers

- Details of the parties
- Subject of the agreement
- Duties of each party
- Scope of authority of each party
- Terms and conditions of bookings
- Terms of deposits and payments
- Commissions
- Cancellation and amendment clauses



Slide 28

Slide No	Trainer Notes
28.	<p><b>Class Activity – Discuss contents of operational arrangements</b></p> <ul style="list-style-type: none"> <li>• Trainer to show an example of an operational agreement</li> <li>• Discuss possible points you would include for each of these points.</li> </ul>

## Slide

## Select suppliers

### Contents of an operational arrangement with suppliers

- Liabilities and charges
- Duration of contract
- Complaints procedure
- Termination of contract
- Legal jurisdiction and governing law
- Data protection
- Distribution and promotion
- Banking details



### COMPLETE ACTIVITY 4

Slide 29

Slide No	Trainer Notes
29.	<p><b>Class Activity – Discuss contents of operational arrangements &amp; Activity</b></p> <ul style="list-style-type: none"> <li>• Trainer to show an example of an operational agreement</li> <li>• Discuss possible points you would include for each of these points</li> <li>• Complete Activity 4.</li> </ul>

Slide

## Sources of information and resources

### Sources of travel product and services information

Naturally the best way to gain information is through direct contact with suppliers

- Who would you contact?
- How would you make contact?



Slide 30

Slide No	Trainer Notes
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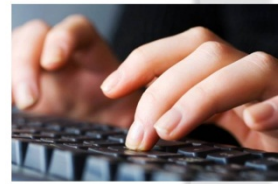
30.	<b>Class Activity – Identify sources of information</b> <ul style="list-style-type: none"><li>Discuss questions in the slide.</li></ul>
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## Slide

## Sources of information and resources

### 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)



Slide 31

Slide No	Trainer Notes
31.	<p><b>Class Activity – Identify sources of information</b></p> <ul style="list-style-type: none"> <li>● Trainer to show sources of information</li> <li>● What information can be gathered from each source?</li> </ul>

## Slide

## Sources of information and resources

### Sources of travel product and services information

- Internal database of product suppliers and their details
- Supplier information
- International airline guides
- Travel Trade Yearbook
- Travel Information Manual (TIM)
- Passenger air tariff



Slide 32

Slide No	Trainer Notes
32.	<p><b>Class Activity – Identify sources of information</b></p> <ul style="list-style-type: none"> <li>• Trainer to show sources of information</li> <li>• What information can be gathered from each source?</li> </ul>

## Slide

## Sources of information and resources

### Sources of travel product and services information

- Trade press
- General print and electronic media
- Literature
- Educationals
- Networks and contacts
- Other organisations in the industry



Slide 33

Slide No	Trainer Notes
33.	<p><b>Class Activity – Identify sources of information</b></p> <ul style="list-style-type: none"> <li>• Trainer to show sources of information</li> <li>• What information can be gathered from each source?</li> </ul>

## Slide

## Sources of information and resources

### Sources of travel product and services information

- The internet
- Product familiarisations
- The internet, travel websites, travel advisor, blogs
- Travel companies product launches, travel shows and information nights



### COMPLETE ACTIVITY 5

Slide 34

Slide No	Trainer Notes
----------	---------------

34.

**Class Activity – Identify sources of information & Activity**

- Trainer to show sources of information
- What information can be gathered from each source?
- Complete Activity 5.



## Slide

## Element 2:

# Identify client booking requirements



Slide 35

Slide No	Trainer Notes
35.	<p>Introduce topic.</p> <p><b>Class Activity – General Discussion</b></p> <p>Ask general questions:</p> <ul style="list-style-type: none"><li>• How can you find out about their requirements?</li><li>• What are common types of requirements?</li><li>• How can you store these requirements?</li></ul>

## Slide

## Identify client booking requirements

Performance Criteria for this Element are:

- 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



Slide 36

Slide No	Trainer Notes
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36.	Trainer identifies the Performance Criteria for this Element, as listed on the slide.
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## Slide

## Identify client booking requirements

Performance Criteria for this Element are:

- Confirm authority to proceed from client
- Obtain payment from client
- Update client file



Slide 37

Slide No	Trainer Notes
----------	---------------

37.	Trainer identifies the Performance Criteria for this Element, as listed on the slide.
-----	---

## Slide

## Create client file

### Importance of creating client files

Before information can be stored relating to customer enquiries, there are certain preparatory tasks that need to be completed.

This involves the identification and preparation of:

- Information recording and storage systems
- Client files



Slide 38

Slide No	Trainer Notes
38.	<b>Class Activity – Questions</b> <ul style="list-style-type: none"> <li>• What are examples of systems used?</li> </ul>

## Slide

## Create client file

### Types of information recording and storage systems

Most travel agents use one of the following methods to record the detail of the products and services booked, their status and other relevant customer detail.

- A totally manual system
- A totally electronic system
- A combination of both – most common



Slide 39

Slide No	Trainer Notes
39.	<p><b>Class Activity – Questions</b></p> <ul style="list-style-type: none"> <li>• What are examples of systems used?</li> <li>• What are the advantages / disadvantages of each?</li> </ul>

Slide

## Create client file

### Importance of recording accurate information

It is important that these records be accurately maintained to ensure:

- Efficiency
- Effectiveness
- Team work
- Profitability
- Enhanced customer service



Slide 40

Slide No	Trainer Notes
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40.	<b>Class Activity – Discuss importance of recording accurate information</b> <ul style="list-style-type: none"><li>• Discuss importance of recording accurate information.</li></ul>
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## Slide

## Create client file

### Create client files

Most travel agencies will use a combination recording system to record:

- Customer details
- Supplier quotations
- Travel agency quotations



Slide 41

Slide No	Trainer Notes
41.	<b>Class Activity – Questions</b> <ul style="list-style-type: none"><li>• How can information be recorded?</li></ul>

Slide

## Create client file

### Client file details

- 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



Slide 42

Slide No	Trainer Notes
42.	<b>Class Activity – Discussion &amp; show client file examples</b> <ul style="list-style-type: none"><li>• Discuss these details</li><li>• Trainer to show example of client file, both manual and electronic formats.</li></ul>



## Slide

## Create client file

### 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



### COMPLETE ACTIVITY 6

Slide 43

Slide No	Trainer Notes
43.	<b>Class Activity – Discussion &amp; Activity</b> <ul style="list-style-type: none"> <li>• Discuss these details</li> <li>• Complete Activity 6.</li> </ul>

## Slide

## Identify specific client requirements

### Importance of collecting specific client requirements

Naturally before any quotation can be taken, it is important to:

- Collect client personal information
- Identify the needs of the client



Slide 44

Slide No	Trainer Notes
44.	<b>Class Activity – Questions</b> <ul style="list-style-type: none"> <li>• How can you collect their personal information?</li> <li>• How can you identify travel needs?</li> </ul>

## Slide

## Identify specific client requirements

### 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



Slide 45

Slide No	Trainer Notes
45.	<b>Class Activity – Discuss process</b> <ul style="list-style-type: none"> <li>• Trainer to discuss the process.</li> </ul>

## Slide

## Identify specific client requirements

### Seek customer personal information

- Name, initial and title
- Dates of birth for passengers, in particular children
- Contact details for home, work and mobiles
- Special meal requests or seating preferences
- Frequent flyer information and club memberships
- Details of travel such as dates, places and products
- Payment details
- Wholesaler or Consolidator used



Slide 46

Slide No	Trainer Notes
46.	<p><b>General Discussion</b></p> <p>Discuss information to be collected for each of these points.</p> <p><b>Role Play</b></p> <ul style="list-style-type: none"> <li>• In pairs, one person is the travel agent and the other person the customer seeking a travel quotation</li> <li>• The travel quotation will be based on the thoughts of the customer</li> <li>• The travel agent must gather information and write answers done in an accurate manner.</li> </ul>

## Slide

## Identify specific client requirements

### Identify customer travel details and requirements

- Name and contact details of the client
- Days, dates and times
- Duration and frequency
- Budget
- Customer numbers and classification, including adults, children, babies and groups
- Non-negotiable elements
- Preferred travel options
- Reasons for trip, function



Slide 47

Slide No	Trainer Notes
47.	<p><b>General Discussion</b></p> <p>Discuss information to be collected for each of these points.</p> <p><b>Role Play</b></p> <ul style="list-style-type: none"> <li>• In pairs, one person is the travel agent and the other person the customer seeking a travel quotation</li> <li>• The travel quotation will be based on the thoughts of the customer</li> <li>• The travel agent must gather information and write answers done in an accurate manner.</li> </ul>

## Slide

## Identify specific client requirements

### Identify customer travel details and requirements

- Destinations, venues, attractions and events
- Accommodation and dining/catering requirements
- Catering and conference requirements
- Proposed itinerary, including destinations (intermediary and final destinations), services and activities required, attractions to be visited
- Previous history of the client in relation to bookings made



Slide 48

Slide No	Trainer Notes
48.	<p><b>General Discussion</b></p> <p>Discuss information to be collected for each of these points.</p> <p><b>Role Play</b></p> <ul style="list-style-type: none"> <li>• In pairs, one person is the travel agent and the other person the customer seeking a travel quotation</li> <li>• The travel quotation will be based on the thoughts of the customer</li> <li>• The travel agent must gather information and write answers done in an accurate manner.</li> </ul>

## Slide

## Identify specific client requirements

### Using a Quotation Planner

Each organisation will have established pro-formas or documents which must be used by staff when collecting information from customers in which quotations can be based around.

- What is the benefit of using a quotation planner?
- What information do you wish to collect?



### COMPLETE ACTIVITY 7

Slide 49

Slide No	Trainer Notes
49.	<p><b>Class Activity – Demonstration and Activity</b></p> <ul style="list-style-type: none"> <li>• Trainer to show audience copies of a planner</li> <li>• Audience to create their own planners or think of questions they would include in their own planners</li> <li>• Complete Activity 7.</li> </ul>

## Slide

## Select appropriate suppliers

### Sourcing and selecting appropriate suppliers

It is based on:

- Availability of appropriate products and services to suit the stated or established customer needs
- Suitable suppliers or wholesalers that can provide these products
- Prices that meet the passengers budget



Slide 50

## Slide No

## Trainer Notes

50.

#### Class Activity – Discussion

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



## Slide

## Select appropriate suppliers

### 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



Slide 51

Slide No	Trainer Notes
51.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"> <li>• Discuss the tasks associated with each of these activities.</li> </ul>

## Slide

## Select appropriate suppliers

### Consider existing agreements & preferred suppliers

- A preferred agreement is a formal commercial agreement between a supplier and a travel agent which facilitates the payment of extra commission and other benefits by the supplier to the travel agent in exchange for the travel agents agreement to sell the suppliers product



### COMPLETE ACTIVITY 8

Slide 52

Slide No	Trainer Notes
52.	<p><b>Class Activity – Identify preferred supplier agreement &amp; Activity</b></p> <ul style="list-style-type: none"> <li>• Trainer to show example of a preferred supplier agreement</li> <li>• What needs to be considered when developing a preferred supplier agreement?</li> <li>• Complete Activity 8.</li> </ul>

## Slide

## Prepare and supply quotation

### Definition of a quotation

- A quotation is a summary of costs for products and services which are provided by the travel agent to potential customers who wish to travel



Slide 53

Slide No	Trainer Notes
53.	<b>Class Activity – Discussion &amp; Show</b> Ask general questions: <ul style="list-style-type: none"><li>• What information is included in a proposal?</li><li>• Trainer to show audience copies of an itinerary.</li></ul>

## Slide

## Prepare and supply quotation

### Methods to prepare quotations

There are two primary ways in which a travel organisation agent will record and administer a customer's details and requirements in relation to the provision of a quotation:

- Electronic – a computer record
- Manual – a hand written record



Slide 54

Slide No	Trainer Notes
54.	<p><b>Class Activity – Questions</b></p> <ul style="list-style-type: none"> <li>• What is the common method?</li> <li>• What are the advantages / disadvantages of both methods?</li> </ul>

## Slide

## Prepare quotation

### General quotation inclusions

- Use official company stationery
- Date the quote
- Avoid the use of jargon
- Ensure correct spelling and grammar
- Include Customer, Passenger names
- Specify currency
- Provide both a per person and total price



Slide 55

Slide No	Trainer Notes
55.	<p><b>Class Activity – Prepare draft quotation</b></p> <ul style="list-style-type: none"> <li>● Based on the Work Project Case Study or scenarios created by the Trainer, the Audience is to develop draft quotations for various travel scenarios.</li> </ul>

## Slide

## Prepare quotation

### General quotation inclusions

- State validity of the quote
- Detail all the arrangements included in the quote
- Follow a logical and sequential order for arrangements
- Detail deposit amount and date required
- Cover payment options and any associated cost
- Draw attention to the booking terms and conditions



Slide 56

Slide No	Trainer Notes
56.	<p><b>Class Activity – Prepare draft quotation</b></p> <ul style="list-style-type: none"> <li>● Based on the Work Project Case Study or scenarios created by the Trainer, the Audience is to develop draft quotations for various travel scenarios.</li> </ul>

## Slide

## Prepare quotation

### General quotation inclusions

- Outline any passport or visa requirements
- Recommend Travel Insurance
- Thank the customer for the opportunity to provide the quotation
- Be specific when and how you will contacting them to follow-up



Slide 57

Slide No	Trainer Notes
57.	<p><b>Class Activity – Prepare draft quotation</b></p> <ul style="list-style-type: none"> <li>• Based on the Work Project Case Study or scenarios created by the Trainer, the Audience is to develop draft quotations for various travel scenarios.</li> </ul>

## Slide

## Prepare quotation

### Inclusions in formal quotations

- Date of quotation and reference number
- Clients name
- Phone contacts and fax
- Email address
- Address
- Month of travel
- Length of travel and class of travel



Slide 58

Slide No	Trainer Notes
58.	<p><b>Class Activity – Discussion</b></p> <ul style="list-style-type: none"> <li>● Discuss the importance of these points in a quotation</li> <li>● Provide examples or specific pieces of information that must be included for each point.</li> </ul>



## Slide

## Prepare quotation

### Inclusions in formal quotations

- ⦿ All products and services required
- ⦿ Inclusions and exclusions
- ⦿ Insurance details
- ⦿ Payment requirements and cancellation fees
- ⦿ Conditions of the quote
- ⦿ Deposits required
- ⦿ Service fees
- ⦿ Expiry date of the quotation
- ⦿ General conditions and rules



Slide 59

Slide No	Trainer Notes
59.	<p><b>Class Activity – Discussion</b></p> <ul style="list-style-type: none"> <li>• Discuss the importance of these points in a quotation</li> <li>• Provide examples or specific pieces of information that must be included for each point.</li> </ul>

## Slide

## Prepare quotation

### Identify terms and conditions

All quotations will come with terms and conditions that will apply to various aspects of travel arrangements.

Terms and conditions may be provided by:

- The travel agent themselves
- Suppliers
- The individual product or service provider



Slide 60

Slide No	Trainer Notes
60.	<p><b>Class Activity – List terms and conditions</b></p> <ul style="list-style-type: none"> <li>• Audience to prepare list of all possible terms and conditions affecting travel bookings and arrangements.</li> </ul>

## Slide

## Prepare quotation

### Types of terms and conditions

- Terms and methods of payment
- Dates for payment of deposits and final payment
- Notifications regarding final confirmation of the booking
- Cancellations and penalties and charges that apply
- Procedures and charges that apply to name and date changes for the booking
- Guarantees and warranties that apply to the products and services covered by the quotation



Slide 61

Slide No	Trainer Notes
61.	<p><b>Class Activity – Discuss terms and conditions</b></p> <ul style="list-style-type: none"> <li>● What is the purpose of each of these terms and conditions?</li> <li>● What are examples / stipulations of each of these terms and conditions?</li> </ul>

## Slide

## Prepare quotation

### Types of terms and conditions

- Exclusion and limitation of liability clauses
- Identification of the period for which the quotation is valid
- Whether or not the quotation is subject to change with or without notice
- Reference to associated terms and conditions as imposed by third party providers
- General industry rules, regulations and codes



Slide 62

Slide No	Trainer Notes
62.	<p><b>Class Activity – Discuss terms and conditions</b></p> <ul style="list-style-type: none"> <li>● What is the purpose of each of these terms and conditions?</li> <li>● What are examples / stipulations of each of these terms and conditions?</li> </ul>

## Slide

## Prepare quotation

### Calculate costs for products and services included in a quotation

- Once products and services required for inclusion in a quotation have been identified, it is now important to accurately determine the costs



Slide 63

Slide No	Trainer Notes
63.	<b>Class Activity – Discuss costs</b> <ul style="list-style-type: none"><li>What costs must be taken into account when developing proposals?</li></ul>

## Slide

## Prepare quotation

### Activities associated with calculating costs of products and services

- Ensuring comprehensiveness and accuracy of all information provided
- Negotiating costs with suppliers, providers and carriers to obtain optimal prices
- Calculating commissions that apply to the quotation
- Calculating mark-up net costs
- Applying host enterprise procedures to determine selling prices
- Including all relevant and legitimate taxes, fees and other charges



Slide 64

Slide No	Trainer Notes
64.	<p><b>Class Activity – Discuss how to calculate costs</b></p> <ul style="list-style-type: none"> <li>● Discuss these activities</li> <li>● Trainer to provide personal experiences in calculating costs.</li> </ul>

## Slide

## Prepare quotation

### Activities associated with calculating costs of products and services

- Incorporating currency conversions into the statement of prices
- Factoring allowable discounts
- Considering and including package deals, where appropriate
- Taking into account seasonal and other premiums that may apply to bookings
- Estimations based on current year prices



Slide 65

Slide No	Trainer Notes
65.	<p><b>Class Activity – Discuss how to calculate costs</b></p> <ul style="list-style-type: none"> <li>• Discuss these activities</li> <li>• Trainer to provide personal experiences in calculating costs.</li> </ul>

## Slide

## Prepare quotation

**Calculate mark-up nett costs and commissions to determine a profitable selling price**

How do you determine:

- Appropriate mark-ups
- Commission levels



Slide 66

Slide No	Trainer Notes
66.	<p><b>Class Activity – Discuss how to calculate mark ups and commissions</b></p> <ul style="list-style-type: none"> <li>• Trainer to explain how to mark up costs</li> <li>• Trainer to show and demonstrate costing software or tools</li> <li>• Trainer to discuss the procedures associated with arranging and collecting commissions.</li> </ul>



## Slide

## Provide and explain quotation

### Key aspects of providing a quotation

- Providing personal interpretation and explanation of the quotation
- Explain in more detail key pieces of information
- Providing supporting brochures and marketing materials.
- Explaining the reasons for charges and fees
- Assisting the client to understand the reputation and expertise of nominated suppliers, providers and carriers



Slide 67

Slide No	Trainer Notes
67.	<b>Class Activity – Discuss how to provide and explain quotation</b> <ul style="list-style-type: none"> <li>• Discuss how to provide and explain quotation.</li> </ul>

## Slide

## Expand and explain quotation

### Process of explaining and expanding on the quotation

- Answer any questions customers may have
- Provide suggestions and recommendations
- Outline the processes associated with confirming and organising travel arrangements
- Guide them through the sales process



COMPLETE ACTIVITIES 9 & 10

Slide 68

Slide No	Trainer Notes
68.	<p><b>Class Activity – Discuss how to provide and explain quotation &amp; Activities</b></p> <ul style="list-style-type: none"> <li>• Discuss how to provide and explain quotation</li> <li>• Complete Activities 9 &amp; 10.</li> </ul>

## Slide

## Confirm authority to proceed

Naturally the overriding purpose of providing a quotation to a customer, is for them to:

- Agree with what information has been presented to them
- Provide authority to proceed with booking
- Help facilitate the booking of travel services



Slide 69

Slide No	Trainer Notes
69.	<b>Class Activity – Discuss importance</b> <ul style="list-style-type: none"> <li>• How can you get the client's authority to proceed with booking?</li> </ul>

## Slide

## Confirm authority to proceed

### Importance of identifying buying signals

When closing in on the sale it is important to monitor customer buying signals and correctly identify and respond to them.

- What are examples of buying signals?



Slide 70

Slide No	Trainer Notes
70.	<b>Class Activity - Questions</b> Discuss question in the slide.

## Slide

## Confirm authority to proceed

### Actions that show a commitment

- Asking specific purchasing questions
- Taking out their credit card or wallet
- Looking for a pen to fill out a booking form
- Spending a long time studying one particular product
- Positive body language, leaning forward in their chair, responding to your eye contact, alert and attentive, frequently nodding



Slide 71

Slide No	Trainer Notes
71.	<p><b>Class Discussion - Questions</b></p> <ul style="list-style-type: none"> <li>• What other buying signs are there?</li> <li>• What should you do when you see a buying sign?</li> </ul>

## Slide

## Confirm authority to proceed

### Obtain authority to proceed

In essence this is the key aspect of providing a quotation to the client. It is vital that before any further actions take place, that the client grants authority for you to proceed with the booking of tourism products and services.

This authority may include:

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



Slide 72

Slide No	Trainer Notes
72.	<b>Class Discussion - Questions</b> <ul style="list-style-type: none"><li>• Why is it important to get this authority?</li></ul>

## Slide

## Confirm authority to proceed

### Actions to make booking

Possible actions to make booking may include:

- Including organisational contact details in the quotation
- Advising client of web-based opportunities to lodge a booking
- Notifying client of any early-bird discounts or bonuses that apply to placement of bookings before a nominated date
- Confirming need for deposit to accompany booking, where applicable



### COMPLETE ACTIVITY 11

Slide 73

Slide No	Trainer Notes
73.	<p><b>Class Activity Role Play – Suggest actions to make a booking &amp; Activity</b></p> <ul style="list-style-type: none"> <li>• Trainer to demonstrate steps, key activities and important points</li> <li>• Complete Activity 11.</li> </ul>

## Slide

## Obtain payment from client

### Importance of collecting payment

- Once you have received authorisation for the booking to proceed, it is important to collect payment from the client for the products and services identified in the quotation
- Most suppliers will not proceed with any booking unless payment can be made



Slide 74

Slide No	Trainer Notes
74.	<p><b>Class Activity – Questions</b></p> <ul style="list-style-type: none"> <li>• Why is this important?</li> <li>• How you can receive payment?</li> <li>• How can you check payment has been received?</li> </ul> <p>Trainer to show SOP's.</p>



## Slide

## Obtain payment from client

### 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



Slide 75

Slide No	Trainer Notes
75.	<b>Class Activity – Questions &amp; Demonstrate payment process methods</b> <ul style="list-style-type: none"> <li>• Trainer to show how to process these payment methods.</li> </ul>

## Slide

## Prepare and issue receipts

### Information contained in a receipt

It is recommended that the following information be contained in a receipt to verify what took place in case of a dispute.

- Your business name, address and phone number
- What took place
- The cost of the good or service and the money paid
- Any specific information affecting the transaction



Slide 76

Slide No	Trainer Notes
76.	<b>Class Activity – Show examples of invoices</b> <ul style="list-style-type: none"> <li>• Trainer to show examples of invoices.</li> </ul>

## Slide

## Check payment status

### Take appropriate action

- What activities are associated with managing finances?
- How can you check payment status?
- What action is taken if there is outstanding amounts:
  - Owed by customers
  - Owed to customers



Slide 77

Slide No	Trainer Notes
77.	<p><b>Class Activity – Questions &amp; Demonstrate actions</b></p> <ul style="list-style-type: none"> <li>• Discuss the questions in the slide</li> <li>• Trainer to demonstrate procedures and actions as appropriate.</li> </ul>

## Slide

## Handle discrepancies

### Under collections from the customer

- ⦿ Failure to invoice for an item, product or service
- ⦿ Incorrect amounts on an invoice for an item, product or service
- ⦿ Failure to provide an updated invoice after amendments have been made
- ⦿ Failure to collect sufficient funds from the customer
- ⦿ Failure to process authorized credit card transactions
- ⦿ Amendment and/or cancellation fees not charged
- ⦿ Money not receipted to the file
- ⦿ Money receipted to incorrect file



Slide 78

Slide No	Trainer Notes
78.	<b>Class Activity – Questions</b> <ul style="list-style-type: none"> <li>• What are the causes?</li> <li>• How do you handle these types of discrepancies?</li> </ul>

## Slide

## Handle discrepancies

### Over collections from the customer

- Payment for an item, product or service which has not been booked
- Incorrect amounts on an invoice for an item, product or service
- Failure to provide an updated invoice after a cancellation/amendment has been made
- A refund to the passenger is waiting to be processed
- Money receipted or allocated to incorrect file



Slide 79

Slide No	Trainer Notes
79.	<p><b>Class Activity – Questions</b></p> <ul style="list-style-type: none"> <li>• What are the causes?</li> <li>• How do you handle these types of discrepancies?</li> </ul>

## Slide

## Handle discrepancies

### Taking corrective action

- Check that all receipts have been correctly allocated to the file
- Correct, via journal or office specific entry, any incorrectly allocated money
- Process credit cards where this has not been done
- Reserve any item, product or service that has not been booked



Slide 80

Slide No	Trainer Notes
80.	<p><b>Class Activity – Demonstration</b></p> <ul style="list-style-type: none"> <li>• Trainer to demonstrate how to handle these types of discrepancies</li> <li>• Shop SOP's where required.</li> </ul>

## Slide

## Handle discrepancies

### Taking corrective action

- Make applicable amendments to items, products and services booked
- Issue a revised invoice for the customer
- Provide a written record of all receipts
- Process refunds if applicable



### COMPLETE ACTIVITY 12

Slide 81

Slide No	Trainer Notes
81.	<p><b>Class Activity – Demonstration &amp; Activity</b></p> <ul style="list-style-type: none"> <li>• Trainer to demonstrate how to handle these types of discrepancies.</li> <li>• Shop SOP's where required</li> <li>• Complete Activity 12.</li> </ul>

## Slide

## Update client file

### Identify changes to client file

Just because the client has agreed to the quotation, authorised the booking to proceed and made payment for the agreed products and services, it does not mean that changes will not need to be made to the client file.

- What are common changes?
- What are reasons to update client file?



Slide 82

Slide No	Trainer Notes
82.	<b>Class Activity – Discuss</b> <ul style="list-style-type: none"> <li>• Discuss questions in the slide.</li> </ul>



## Slide

## Update client file

### Reasons to update 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



Slide 83

Slide No	Trainer Notes
83.	<p><b>Class Activity – Discuss</b></p> <ul style="list-style-type: none"> <li>• Discuss actions associated with these activities.</li> </ul>

## Slide

## Update client file

### Update the financial status of client file

- Keeping track of financial transactions
- Processing accounts payable and receivable
- Recorded on the client's account
- Pay for products and services once payment is received
- Updating invoices and accounts
- Processing refunds



	24378	0.00	1.00
	26952	0.00	0.00
	23386	46.00	92.00
	510515	0.00	0.00
	506783	0.00	0.00
	92001	0.00	0.00
	95001	0.00	0.00
	95011	0.00	0.00
	514278	0.00	0.00
	518003	99.00	99.00
	534941	0.00	0.00
	95010	20.00	20.00
	90120	0.00	0.00

Slide 84

Slide No	Trainer Notes
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84.

**Class Activity – Discuss**

- Discuss actions associated with these activities.

## Slide

## Update client file

### Making changes to quotations

There are many reasons quotations can be done several times before a final package is decided upon.

Regardless of the need to make changes, any changes must be:

- Reflect need for change
- Done in a timely manner
- Accurate and relevant to the changes



Slide 85

Slide No	Trainer Notes
85.	<p><b>Class Activity – Discuss reasons for change</b></p> <ul style="list-style-type: none"> <li>• What are common reasons for changes to quotations?</li> <li>• What causes these?</li> <li>• How will they impact on quotations?</li> </ul>

## Slide

## Update client file

### Reasons for amendments

There are endless reasons for the need to change a draft quotation including but not limited to:

- Changes requested by customers
- Changes requested by management
- Changes notified by suppliers or product/service providers
- Changes notified by governments



Slide 86

Slide No	Trainer Notes
86.	<p><b>Class Activity – Discuss reasons for amendments</b></p> <ul style="list-style-type: none"> <li>• What are common reasons by each of these stakeholders?</li> <li>• How will they impact on quotations?</li> </ul>

## Slide

## Update client file

### Methods to record and file information

Records must be kept in one of the following ways:

- Hard copies – physical printouts filed in date order
- Electronic copies – soft copies filed in version order
- Emailed copies – retained in client email folder



Slide 87

Slide No	Trainer Notes
87.	<b>Class Activity – Demonstrate filing methods</b> <ul style="list-style-type: none"><li>• Trainer shows how files are to be maintained.</li></ul>

## Slide

## Update client file

### Considerations when recording and filing information

- All relevant persons have access to files including the most current version
- Everyone understands and follows the correct procedures
- Updates of files are recorded and easily identified
- The most current version is easily identifiable

### COMPLETE ACTIVITY 13



Slide 88

Slide No	Trainer Notes
88.	<p><b>Class Activity – Discuss points &amp; Activity</b></p> <p>Discuss points:</p> <ul style="list-style-type: none"> <li>• Trainer to highlight any points for consideration</li> <li>• Complete Activity 13.</li> </ul>

## Slide

## Element 3:

# Request products and services from supplier



Slide 89

Slide No	Trainer Notes
89.	<p>Introduce topic.</p> <p><b>Class Activity – General Discussion</b></p> <p>Ask general questions:</p> <ul style="list-style-type: none"> <li>• How can you request products and services from suppliers?</li> </ul>

Slide

## Request products and services from supplier

Performance Criteria for this Element are:

- 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



Slide 90

Slide No	Trainer Notes
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90.	Trainer identifies the Performance Criteria for this Element, as listed on the slide.
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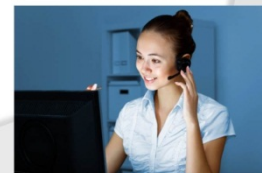


## Slide

## Request products and services from supplier

Performance Criteria for this Element are:

- 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



Slide 91

Slide No	Trainer Notes
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91.	Trainer identifies the Performance Criteria for this Element, as listed on the slide.
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## Slide

## Forward requests to suppliers

### Purpose of contacting suppliers

Previously the focus on contacting suppliers was to gather accurate information regarding products and services, whereas now the focus is on making bookings.

- For what reasons do you need to contact suppliers of tourism product and services?



Slide 92

Slide No	Trainer Notes
92.	<b>Class Activity – Discuss questions</b> <ul style="list-style-type: none"><li>• Discuss question in the slide.</li></ul>

## Slide

## Forward requests to suppliers

### Comply with organisational requirements when forwarding requests to suppliers

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

### COMPLETE ACTIVITY 14



Slide 93

Slide No	Trainer Notes
93.	<p><b>Class Activity – Provide examples &amp; Activity</b></p> <ul style="list-style-type: none"> <li>• Trainer to provide examples of organisational requirements</li> <li>• Complete Activity 14.</li> </ul>

Slide

## Forward requests to suppliers

### Methods to forward requests to suppliers

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



### COMPLETE ACTIVITY 15

Slide 94

Slide No	Trainer Notes
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94.

**Class Activity – Provide examples & Activity**

- Trainer to provide examples of these methods
- Complete Activity 15.

## Slide

## Forward requests to suppliers

### Make requests for multiple services

Reservations for multiple services can involve many different suppliers to ensure the customer's requirements are met.

You will need to:

- ⦿ Interpret correctly requirements and services
- ⦿ Keep accurate records of bookings made
- ⦿ Find this information and products as required
- ⦿ Identify codes, abbreviations and jargon



Slide 95

Slide No	Trainer Notes
95.	<p><b>Class Activity – Provide examples</b></p> <ul style="list-style-type: none"> <li>• Trainer to provide examples of considerations when requesting multiple products and services.</li> </ul>

Slide

## Forward requests to suppliers

### Request bookings and costs from suppliers

- What are general considerations when securing bookings and costs?
- What information do you need to secure bookings?
- What arrangements need to be made to secure bookings?
- How can you identify final supplier details and costs?



Slide 96

Slide No	Trainer Notes
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96.

**Class Activity – Discuss questions**

- Discuss questions in the slide.

## Slide

## Forward requests to suppliers

### Identify requested booking information

What information would need to be forwarded to suppliers to request and book the following services?

- Tours
- Flights
- Accommodation
- Cruises
- Car Hire



Slide 97

Slide No	Trainer Notes
97.	<b>Class Activity – Discuss questions</b> <ul style="list-style-type: none"><li>● Refer to TM Pages 84-86 for examples.</li></ul>

## Slide

## Forward requests to suppliers

### Negotiate costs with suppliers

- The gross price
- The commission
- The Nett price
- The currency
- The method of payment
- The deposit amount and deadline



Slide 98

Slide No	Trainer Notes
98.	<p><b>Class Activity – Discuss how to negotiate costs with suppliers</b></p> <ul style="list-style-type: none"> <li>• Discuss these activities</li> <li>• Trainer to provide personal experiences in negotiating costs with suppliers.</li> </ul>



## Slide

## Forward requests to suppliers

### Negotiate costs with suppliers

- The final payment deadline
- The cancellation or amendment fees
- The allocation of seats/rooms/cabins
- The release back date for unsold allocations
- The deadline for final passenger names/numbers



Slide 99

Slide No	Trainer Notes
99.	<p><b>Class Activity – Discuss how to negotiate costs with suppliers</b></p> <ul style="list-style-type: none"> <li>• Discuss these activities</li> <li>• Trainer to provide personal experiences in negotiating costs with suppliers.</li> </ul>

## Slide

## Forward requests to suppliers

### Identifying final supplier details and costs

In summary you should ensure that you have secured and noted down the following information:

- 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



Slide 100

Slide No	Trainer Notes
100.	<p><b>Class Activity – Discuss</b></p> <ul style="list-style-type: none"> <li>• Discuss the importance of these points.</li> </ul>

## Slide

## Confirmed bookings

### Product supplier information

Booking advices and confirmations from product supplier to the travel agent will specify:

- The Travel Agent detail
- The passenger names
- The products or services booked
- The status of the items
- The gross price and the nett amount
- The commission expressed as a % and a dollar amount



Slide 101

Slide No	Trainer Notes
101.	<p><b>Class Activity – Show example</b></p> <p>Trainer to show examples of information.</p>

## Slide

## Confirmed bookings

### Product supplier information

Once all requests for bookings have been sent to the respective suppliers it is now time to follow up the booking request with the end result of obtaining confirmation of the booking of all products and services requested.

- How can you follow up the requests?



Slide 102

Slide No	Trainer Notes
102.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"><li>• Discuss question in the slide.</li></ul>

## Slide

## Confirmed bookings

### Check responses to requests

Firstly it is essential to check the responses to requests.

This may include a demand for suppliers to provide, in hard copy or electronic format:

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



Slide 103

Slide No	Trainer Notes
103.	<p><b>Class Activity – Discussion</b></p> <ul style="list-style-type: none"> <li>• Why is this information important?</li> </ul>

## Slide

## Confirmed bookings

### Seek alternate suppliers of products and services

At times whilst at the time of a quotation specific products and services may have been available, when it is actually time to make a booking there is no availability.

- Why would you need to seek alternate suppliers?
- What can you do if there is an inability to provide products and services as originally requested?



Slide 104

Slide No	Trainer Notes
104.	<p><b>Class Activity – Discussion</b></p> <ul style="list-style-type: none"> <li>• Discuss questions in the slide.</li> </ul>

## Slide

## Confirmed bookings

### Confirm bookings

One important aspect of making bookings for various tourism products and services is to receive an actual confirmation of bookings.

Before we can issue any documents the booking requests from the supplier and airlines must be confirmed.

- How do you receive confirmation of bookings?
- What information do you want to receive suppliers?



Slide 105

Slide No	Trainer Notes
105.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"> <li>• Discuss questions in the slide.</li> </ul>

Slide

# Confirmed bookings

## 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



Slide 106

Slide No	Trainer Notes
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106.

**Class Activity – Discussion**

- Discuss these methods
- Which methods are the most common and why?



## Slide

## Confirm booking information

### Travel agent information

Passenger confirmation from the travel agent to the customer will specify:

- The Travel Agent detail (Agency letterhead and logo)
- The passenger names
- The products or services booked
- The status of the items
- The gross price – usually quoted per person
- The conditions of booking, amendment and cancellation
- The payment schedule for deposit and final money



Slide 107

Slide No	Trainer Notes
107.	<p><b>Class Activity – Show example</b></p> <p>Trainer to show examples of information.</p>

## Slide

## Confirm booking information

### Check interrelated travel arrangements, times and connections

Where the booking has been made using a CRS/GDS, the system will generally highlight, at the time of booking, any date and segment continuity issues and things such as insufficient connecting time.

- What other checks can you make?

COMPLETE ACTIVITIES 16 & 17



Slide 108

Slide No	Trainer Notes
108.	<p><b>Class Activity – Discussion &amp; Activities</b></p> <ul style="list-style-type: none"> <li>Discuss questions in the slide</li> <li>Complete Activities 16&amp;17.</li> </ul>

## Slide

## Element 4: Maintain client file



Slide 109

Slide No	Trainer Notes
109.	<p>Introduce topic.</p> <p><b>Class Activity – General Discussion</b></p> <p>Ask general questions:</p> <ul style="list-style-type: none"><li>• Why is it important to maintain the client file?</li><li>• How can you do it?</li></ul>

Slide

## Maintain client file

Performance Criteria for this Element are:

- Record lodgment 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



Slide 110

Slide No	Trainer Notes
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110.	Trainer identifies the Performance Criteria for this Element, as listed on the slide.
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## Slide

## Monitor client files and records

### Record all details

Regardless of the system used to record information, all required details to be recorded must include:

- 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



Slide 111

Slide No	Trainer Notes
111.	<p><b>Class Activity – Demonstration of recording details</b></p> <ul style="list-style-type: none"> <li>• Trainer to demonstrate how to record details as mentioned in the slide</li> <li>• Show processes where required, providing reasoning.</li> </ul>

## Slide

## Monitor client files and records

### Activities 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



Slide 112

Slide No	Trainer Notes
112.	<p><b>Class Activity – Discussion</b></p> <ul style="list-style-type: none"> <li>● Discuss tasks associated with these activities.</li> </ul>

## Slide

## Monitor client files and records

### Methods to monitor client files and records

- Diary (manual and electronic)
- Ticketing time limit (TTL) in your CRS
- Emails
- Supplier online booking updates



Slide 113

Slide No	Trainer Notes
113.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"><li>• Trainer to explain methods using examples.</li></ul>

## Slide

## Monitor client files and records

### Store and maintain relevant records

Whilst every client file will differ in terms of the content contained within that need to be managed and updated by travel staff, common records include:

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



Slide 114

Slide No	Trainer Notes
114.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"> <li>● Trainer to explain methods using examples.</li> </ul>



## Slide

## Monitor client files and records

### Store and maintain relevant records

Records may be maintained for:

- Your office
- Suppliers
- Clients



Slide 115

Slide No	Trainer Notes
115.	<p><b>Class Activity – Discussion</b></p> <ul style="list-style-type: none"> <li>• How would the focus of your records management differ for each stakeholder?</li> </ul>

## Slide

## Monitor client files and records

### Record lodgement of booking

Regardless of the information and documents relating to a client booking that are added to a client file, steps associated with recording lodgement of bookings include:

- Including physical copy of relevant documentation in client file
- Noting time and date of lodgement



Slide 116

Slide No	Trainer Notes
116.	<p><b>Class Activity – Discussion</b></p> <ul style="list-style-type: none"> <li>• Explain the importance of recording lodgement of booking.</li> </ul>

## Slide

## Monitor client files and records

### Recording customer details

- Name of the person making the booking or requesting the quote
- Their contact details
- The name and address of their company
- The full street address of the passengers
- The full names of the passengers
- The passenger contact details
- Date of birth for any children or infants travelling
- Source
- Detail of all products and services booked



Slide 117

Slide No	Trainer Notes
117.	<p><b>Class Activity – Demonstration of recording details</b></p> <ul style="list-style-type: none"> <li>• Trainer to demonstrate how to record details as mentioned in the slide</li> <li>• Show processes where required, providing reasoning.</li> </ul>

## Slide

## Monitor client files and records

### Recording products and services booked

The following detail for products and services booked must include:

- What products and services have been booked
- Where has it been booked for
- When has it been booked for
- Who has it been booked for
- How was it booked
- Relevant booking/quote reference numbers



Slide 118

Slide No	Trainer Notes
118.	<p><b>Class Activity – Demonstration of how to review products and services booked</b></p> <ul style="list-style-type: none"> <li>● Trainer to demonstrate how to review details as mentioned in the slide</li> <li>● Show processes where required, providing reasoning.</li> </ul>

## Slide

## Monitor client files and records

### Ensuring accuracy of information

- All passenger names match their photo ID/passport
- All passenger names are correct across all items, products or services
- All items, products or services have a confirmed status
- There is date/city continuity for all items, product or services booked
- There are no unexplained gaps in the itinerary
- The booking is fully paid



### COMPLETE ACTIVITY 18

Slide 119

Slide No	Trainer Notes
119.	<p><b>Class Activity – Demonstration of how to review products and services booked</b></p> <ul style="list-style-type: none"> <li>● Trainer to demonstrate how to review details as mentioned in the slide</li> <li>● Show processes where required, providing reasoning</li> <li>● Complete Activity 18.</li> </ul>

## Slide

## Issue notification and documents

### Purpose of documents

Whilst it is important that all travel documents required for travel are provided to customers, in many cases the travel companies will provide additional information to help ensure the travel experience for customers is more efficient and that they have all essential information at their disposal.

- What are examples of travel documents?
- What support documents do travel companies provide?



Slide 120

Slide No	Trainer Notes
120.	<p><b>Class Activity – Discussion &amp; Show documents</b></p> <ul style="list-style-type: none"> <li>• Discuss the questions in the slide</li> <li>• Provide examples where applicable.</li> </ul>

## Slide

## Issue notification and documents

### Purpose of documents

- It details for the customer exactly what has been booked and confirmed and for whom
- It advises the customer who will be providing the service
- It provides additional information for the customer in relation to the utilisation of the product or service
- It contains reference information for the supplier or operator providing the service



Slide 121

Slide No	Trainer Notes
121.	<p><b>Class Activity – Discussion &amp; Show documents</b></p> <ul style="list-style-type: none"> <li>• Discuss the questions in the slide</li> <li>• Provide examples where applicable.</li> </ul>

Slide

## Issue notification and documents

### Complexity of travel documentation

Given the different companies associated with booking travel documentation, including airlines, tour operators, car hire and accommodation establishments, it is easy to see that the task of taking travel related reservations and ticketing is not only complex, but it is essential that information is accurate.



Slide 122

Slide No	Trainer Notes
122.	<p><b>Class Activity – General Discussion</b></p> <ul style="list-style-type: none"><li>• What documentation needs to be prepared for travel?</li><li>• Who produces this documentation?</li></ul>



## Slide

## Issue notification and documents

### Travel company documents and materials

- Confirmation letters
- Flight itinerary
- Final itinerary
- Itinerary updates
- Invoice/Statement of account
- Receipts
- Welcome home letters



Slide 123

Slide No	Trainer Notes
123.	<b>Class Activity – Show documents</b> <ul style="list-style-type: none"> <li>● Provide examples where applicable.</li> </ul>

Slide

## Issue notification and documents

### Travel company documents and materials

- Rail/coach tickets (eTickets)
- Airline tickets (eTickets)
- Insurance policies
- Car/hotel/tour vouchers
- Maps
- Custom and immigration forms



Slide 124

Slide No	Trainer Notes
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124.	<b>Class Activity – Show documents</b> <ul style="list-style-type: none"><li>• Provide examples where applicable.</li></ul>
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## Slide

## Issue notification and documents

### Travel company documents and materials

- Visa forms
- Passport forms
- Dossier
- Refund letter/credit note



Slide 125

Slide No	Trainer Notes
125.	<b>Class Activity – Show documents</b> <ul style="list-style-type: none"> <li>● Provide examples where applicable.</li> </ul>

## Slide

## Issue notification and documents

### Types of non-air documentation

- Accommodation vouchers
- Bus/coach or other forms of transportation tickets
- Car hire/motor home vouchers
- Cruise vouchers
- Tour vouchers
- Vouchers for attractions/theme park entry
- Vouchers for any tourism product or service



Slide 126

Slide No	Trainer Notes
126.	<p><b>Class Activity – Review of documents</b></p> <p>Trainer to:</p> <ul style="list-style-type: none"> <li>● Provide examples of these documents</li> <li>● Explain purpose of documents</li> <li>● Highlight contents of documents.</li> </ul>

## Slide

## Issue notification and documents

### Types of non-air documentation

- Meeting or event confirmation letters
- Delegate information packs
- Travel insurance documentation
- Confirmation vouchers
- Visa forms
- Visas
- Passport forms
- Traveller's cheque requests



Slide 127

Slide No	Trainer Notes
127.	<p><b>Class Activity – Review of documents</b></p> <p>Trainer to:</p> <ul style="list-style-type: none"> <li>● Provide examples of these documents</li> <li>● Explain purpose of documents</li> <li>● Highlight contents of documents.</li> </ul>

## Slide

## Issue notification and documents

### Types of non-air documentation

- Passenger itineraries
- Operational itineraries for crews including tourist guides, drivers and tour managers
- Briefing notes for crews
- Passenger lists
- Rooming lists
- Pro-formas
- Sales returns



Slide 128

Slide No	Trainer Notes
128.	<p><b>Class Activity – Review of documents</b></p> <p>Trainer to:</p> <ul style="list-style-type: none"> <li>● Provide examples of these documents</li> <li>● Explain purpose of documents</li> <li>● Highlight contents of documents.</li> </ul>

## Slide

## Issue notification and documents

### Types of air documentation

- Tickets
- Miscellaneous charge orders
- Credit card charge forms
- Exchange tickets
- Reservation alterations and re-validation stickers
- Pre-paid ticket advices



Slide 129

Slide No	Trainer Notes
129.	<b>Class Activity – Show documents</b> <ul style="list-style-type: none"> <li>● Provide examples where applicable.</li> </ul>

## Slide

## Issue notification and documents

### Types of air-related tickets

Tickets to be issued may be:

- Domestic
- International
- Four-stage tickets
- Conjunction tickets



Slide 130

Slide No	Trainer Notes
130.	<p><b>Class Activity – Show documents</b></p> <ul style="list-style-type: none"> <li>● Provide examples where applicable.</li> </ul>



## Slide

## Process air tickets

### Process air tickets

All air tickets are E-tickets and there are two types:

- E-ticket issued online using an online airline travel agent website
- E-ticket issued via a CRS/GDS or by a third party



Slide 131

Slide No	Trainer Notes
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131.

#### Class Activity – Demonstrate processing of air tickets

- Trainer to demonstrate methods and procedures for processing air tickets.

## Slide

## Process air tickets

### Issuing E-tickets

There are a number of ways to issue E-Tickets:

- Issue at time of booking using an online airline travel agents website
- Issue via a CRS/GDS using the ticketing facility
- Issue via a Ticket Consolidator e.g. Concorde International
- Issue via the airline e.g. a group



Slide 132

Slide No	Trainer Notes
132.	<p><b>Class Activity – Demonstrate issuing of e-tickets</b></p> <ul style="list-style-type: none"> <li>• Trainer to demonstrate methods and procedures for issuing of e-tickets.</li> </ul>

## Slide

## Process air tickets

### E-ticket information

In the example that follows, the E-tickets have been generated via an Agents Airline Website and reflect the following:

- Full names of all the passengers
- Their airline loyalty member numbers
- The itinerary and flight details
- The airfare and the taxes
- The payment method



Slide 133

Slide No	Trainer Notes
133.	<p><b>Class Activity – Discussion information in e-ticket</b></p> <ul style="list-style-type: none"> <li>• Trainer to discuss the different types and reasons for information on an e-ticket.</li> </ul>

## Slide

## Process air tickets

### General ticketing overview

- One ticket per passenger is required
- One coupon per flight is required
- Where the itinerary consists of more than 4 flights, conjunction tickets must be issued and must be of the same form code and completed in numeric order
- Flight coupons are issued in date and segment sequence
- Tickets cannot be transferred from the named ticketed passenger to anyone else
- Only IATA approved currency codes are to be used



Slide 134

Slide No	Trainer Notes
134.	<b>Class Activity – General Discussion</b> <ul style="list-style-type: none"> <li>• What is the purpose of these points?</li> </ul>

## Slide

## Checking documentation

**Check all documentation for accuracy prior to issue and amend as necessary**

It is important that all documentation that is received or to be issued is correct.

- Why is this important?
- What do you want to check?
- What are common mistakes with documentation?
- What are the consequences of incorrect information on documentation?



Slide 135

Slide No	Trainer Notes
135.	<p><b>Class Activity – General Discussion</b></p> <ul style="list-style-type: none"> <li>• Discuss the questions in the slide.</li> </ul>

Slide

## Prepare accompaniments

### Prepare accompaniments to travel documents

- Agency branded voucher covers
- Agency branded itinerary covers
- Stationery with agency logo
- Wallets if available
- Baggage labels
- Extra information
- Business card
- Insurance policy



Slide 136

Slide No	Trainer Notes
136.	<b>Class Activity – Show documents</b> <ul style="list-style-type: none"><li>• Provide examples where applicable.</li></ul>

## Slide

## Filing travel documents

### File copies of documents

- Why should you copy documents?
- How can they be copied?
- Who would you forward documents to?



Slide 137

Slide No	Trainer Notes
137.	<b>Class Activity – Questions</b> <ul style="list-style-type: none"><li>• Discuss the questions in the slide.</li></ul>

## Slide

## Dispatch travel documents

### Send documents to customers

Once all the necessary travel documents, vouchers and supporting documents have been collated, they must be dispatched to the customer in a timely and secure manner.

- How is this done?



Slide 138

Slide No	Trainer Notes
138.	<b>Class Activity – Questions</b> <ul style="list-style-type: none"><li>• Discuss the questions in the slide.</li></ul>



## Slide

## Dispatch travel documents

### Host enterprise requirements

Each travel company will have a range of enterprise requirements that must be met when dispatching documents, including but not limited to:

- Security of the documents
- Use of preferred suppliers
- Designated method of forwarding documentation
- Recording evidence of sending of documents
- Capturing evidence that the customer has received the documents



Slide 139

Slide No	Trainer Notes
139.	<b>Class Activity – Questions</b> <ul style="list-style-type: none"> <li>• Why is it important to have host enterprise requirements?</li> </ul>

## Slide

## Dispatch travel documents

### Considerations when dispatch documents

When dispatching documents please consider the following:

- When the passenger is departing
- Where the passenger lives
- Where the passenger is departing from
- Public holidays
- Contents
- Service levels associated with the various delivery options



Slide 140

Slide No	Trainer Notes
140.	<p><b>Class Activity – Questions &amp; provide examples</b></p> <ul style="list-style-type: none"> <li>● Why is it important to take into account these considerations?</li> <li>● Provide examples of how these points will impact the dispatching of documents.</li> </ul>

## Slide

## Dispatch travel documents

### Methods to dispatch documents

Provide the final documentation to the passengers using one of:

- Face to face
- Email – PDF or similar files
- Registered mail
- Post Express
- Courier or personal delivery



### COMPLETE ACTIVITY 19

Slide 141

Slide No	Trainer Notes
141.	<p><b>Class Activity – Questions &amp; Demonstration &amp; Activity</b></p> <ul style="list-style-type: none"> <li>• Where would each of these dispatch options be used/beneficial?</li> <li>• Trainer to demonstrate how to dispatch documents as mentioned in the slide</li> <li>• Show processes where required, providing reasoning</li> <li>• Complete Activity 19.</li> </ul>

## Slide

## Scheduled future action

### Meet requirements of scheduled future action

The process of handling bookings and client files is an ongoing activity for travel sales staff.

- What are examples of future action to be taken?
- How do you know when to 'undertake actions'?
- How can you schedule activities?



Slide 142

Slide No	Trainer Notes
142.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"> <li>• Discuss the questions in the slide.</li> </ul>

## Slide

## Scheduled future action

### Types of post-sale activities

- 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



Slide 143

Slide No	Trainer Notes
143.	<p><b>Class Activity – Discussion</b></p> <ul style="list-style-type: none"> <li>• Discuss these activities.</li> </ul>

## Slide

## Scheduled future action

### Types of post-sale activities

- 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



Slide 144

Slide No	Trainer Notes
144.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"> <li>● Discuss these activities.</li> </ul>

## Slide

## Scheduled future action

### Meeting payment deadlines

Given that many suppliers will not confirm bookings until payments are made, there is a need for payment deadlines to be diarised.

- What are considerations when scheduling payments?

### COMPLETE ACTIVITY 20



Slide 145

Slide No	Trainer Notes
145.	<b>Class Activity – Discussion &amp; Activity</b> <ul style="list-style-type: none"> <li>Discuss these activities</li> <li>Complete Activity 20.</li> </ul>

Slide

## Element 5: Process final booking details for products and services



Slide 146

Slide No	Trainer Notes
146.	<p>Introduce topic.</p> <p><b>Class Activity – General Discussion</b></p> <p>Ask general questions:</p> <ul style="list-style-type: none"><li>• What activities associated with the processing of final booking details for products and services?</li></ul>



## Slide

## Process final booking details for products and services

Performance Criteria for this Element are:

- 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



Slide 147

Slide No	Trainer Notes
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147.	Trainer identifies the Performance Criteria for this Element, as listed on the slide.
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Slide

## Notify supplier of required adjustments

### Considerations when handling adjustments

Regardless of the type of adjustment, it is essential that it is:

- Identified in a timely manner
- Noted accordingly in appropriate files and documentation
- Communicated with relevant parties
- Actioned
- Reflected in invoices



Slide 148

Slide No	Trainer Notes
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148.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"><li>• Discuss these considerations.</li></ul>
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## Slide

## Notify supplier of required adjustments

### Types of adjustments

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



Slide 149

Slide No	Trainer Notes
149.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"> <li>• What are common reasons for adjustments?</li> </ul>

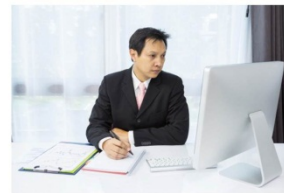
Slide

## Notify supplier of required adjustments

### Notifying supplier of adjustments

- How can you do this?
- How can you ensure they have received, understood and actioned amendments?

### COMPLETE ACTIVITY 21



Slide 150

Slide No

Trainer Notes

150.

**Class Activity – Discussion & Activity**

- Discuss questions in the slide
- Complete Activity 21.

## Slide

## Pay supplier

### 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



Slide 151

Slide No	Trainer Notes
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151.

**Class Activity – Discussion**

- Discuss these activities.

## Slide

## Pay supplier

### Importance of paying suppliers

Like in any business, the payment for products or services, either to be used directly by another organisation, or on behalf of a customer must be handled in a timely manner.

- What are the consequences of not paying suppliers:
  - To the business
  - To the customer



Slide 152

Slide No	Trainer Notes
152.	<p><b>Class Activity – Discussion</b></p> <ul style="list-style-type: none"> <li> <span style="color: black;">●</span> Discuss the questions and consequences of non-payment as mentioned in the slide.           </li> </ul>

## Slide

## Pay supplier

### Action payment

Action payment required by the supplier may include:

- Requesting payment from the accounts department, including processing of cheque, requisition or purchase order
- Self-administering the payment



Slide 153

Slide No	Trainer Notes
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153.

**Class Activity – Demonstration of how to accurately action payment**

- Trainer to demonstrate how to accurately action payment as mentioned in the slide
- Show processes where required, providing reasoning.

Slide

## Pay supplier

### Types of payments

- Cheque
- Electronic payment
- Smart money – Tias Tips
- MoneyDirect
- BPay
- ENETT – via internet site or CRS
- Credit card



Slide 154

Slide No	Trainer Notes
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154.

**Class Activity – Discussion of payment options**

- What are the benefits of each option?
- How are payments processed for each of these options?



## Slide

## Pay supplier

### Follow office payment procedures

Remember to consider office specific procedures in relation to:

- Cheque requisitions
- Authority level required for electronic banking
- Floor limits in relation to credit cards
- Policies regarding merchant fees for credit cards



Slide 155

Slide No	Trainer Notes
155.	<p><b>Class Activity – Discussion of payment procedures</b></p> <ul style="list-style-type: none"> <li>● Discussion importance of having payment procedures.</li> </ul>

## Slide

## Pay supplier

### Handling discrepancies with commissions

- What are common discrepancies?
- What are the causes?
- What actions should be taken?



Slide 156

Slide No	Trainer Notes
156.	<p><b>Class Activity – Questions &amp; Demonstration</b></p> <ul style="list-style-type: none"> <li>• Discuss the commission process:               <ul style="list-style-type: none"> <li>▪ What are the causes?</li> <li>▪ How do you handle these types of discrepancies?</li> </ul> </li> <li>• Trainer to demonstrate how to handle these types of discrepancies</li> <li>• Shop SOP's where required.</li> </ul>

## Slide

## Pay supplier

### Paying air tickets

- It is also important to remember are also suppliers and the airline is paid only once the air tickets are issued
- The timing for the issue of air tickets and therefore the payment is determined by the ticket time limit set by the airline



Slide 157

Slide No	Trainer Notes
157.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"><li>What are the guidelines for processing air ticket payments?</li></ul>

## Slide

## Pay supplier

### Types of payments

If the tour operator is not issuing the air ticket as part of a package, then the travel agent will issue the air ticket and payment is made via one of:

- Passenger's Credit Card (CCCF)
- Billing Settlement Plan (BSP)
- Ticket Consolidator



### COMPLETE ACTIVITY 22

Slide 158

Slide No	Trainer Notes
158.	<p><b>Class Activity – Discussion &amp; Activity</b></p> <ul style="list-style-type: none"> <li>● Discuss and provide examples of each type of payment</li> <li>● Complete Activity 22.</li> </ul>

## Slide

## Inform supplier of final client information

### 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



Slide 159

Slide No	Trainer Notes
159.	<b>Class Activity – Discussion</b> <ul style="list-style-type: none"> <li>● Discuss these processes.</li> </ul>

Slide

## Inform supplier of final client information

### Notifying final client information

- Providing final name and rooming lists
- Providing details of tourist guides, tour managers, crew accompanying clients

COMPLETE ACTIVITY 23



Slide 160

Slide No	Trainer Notes
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160.	<b>Class Activity – Discussion &amp; Activity</b> <ul style="list-style-type: none"><li>• Discuss these processes</li><li>• Complete Activity 23.</li></ul>
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## Slide

**Finish:**  
**Thank you!**



Slide 161

Slide No	Trainer Notes
161.	This is the conclusion of the subject. Thank the audience and deliver assessments as required.





# Recommended training equipment

Accompaniments to travel documentation including:

- Agency branded voucher covers
- Agency branded itinerary covers
- Stationery with agency logo
- Wallets if available
- Baggage labels
- Extra information
- Business card
- Insurance policy.

Air travel documentation

Computer access

Customer information recording forms

Customer reservation sheets

E-tickets

Final contracts / quotations

Internet access

Non-air travel documentation including:

- Accommodation vouchers
- Bus/coach or other forms of transportation tickets
- Car hire/motor home vouchers
- Cruise vouchers
- Tour vouchers
- Vouchers for attractions/theme park entry
- Vouchers for any tourism product or service
- Meeting or event confirmation letters
- Delegate information packs
- Travel insurance documentation
- Confirmation vouchers
- Visa forms
- Visas
- Passport forms

- Traveller's cheque requests
- Passenger itineraries
- Operational itineraries for crews including tourist guides, drivers and tour managers
- Briefing notes for crews
- Passenger lists.

Payment documentation and receipts

Quotation examples

Quotation Planner

Quotation SOP's

Terms and conditions including:

- Travel Agent Terms and Conditions
- Supplier Terms and Conditions
- Product or service provider terms and conditions.

Ticketing SOP's

Travel and tourism related products and services information including:

- Brochures/DVDs
- Hotel and accommodation guides and indexes
- Atlases, maps and encyclopaedias
- Travel guides
- Individual timetables
- Automated information systems
- Computerised Reservations Systems (CRS)
- International airline guides
- Travel Trade Yearbook
- Travel Information Manual (TIM)
- Passenger air tariff
- Trade press
- General print and electronic media, travel magazines and even news bulletins for current issues
- Intranet Websites
- Internal information databases
- Product manuals
- Supplier information and sales kits
- Industry tariffs.

Various travel documentation associated with booking travel documentation, including airlines, tour operators, car hire and accommodation establishments

# Instructions for Trainers for using PowerPoint – Presenter View

Connect your laptop or computer to your projector equipment as per manufacturers' instructions.

In PowerPoint, on the **Slide Show** menu, click **Set up Show**.

Under Multiple monitors, select the Show Presenter View check box.

In the **Display slide show** on list, click the monitor you want the slide show presentation to appear on.

Source: <http://office.microsoft.com>

## Note:

In Presenter View:

You see your notes and have full control of the presentation

Your trainees only see the slide projected on to the screen

## More Information

You can obtain more information on how to use PowerPoint from the Microsoft Online Help Centre, available at:

<http://office.microsoft.com/training/training.aspx?AssetID=RC011298761033>

## Note Regarding Currency of URLs

Please note that where references have been made to URLs in these training resources trainers will need to verify that the resource or document referred to is still current on the internet. Trainers should endeavour, where possible, to source similar alternative examples of material where it is found that either the website or the document in question is no longer available online.



## Appendix – ASEAN acronyms

<b>AADCP</b>	ASEAN – Australia Development Cooperation Program
<b>ACCSTP</b>	ASEAN Common Competency Standards for Tourism Professionals
<b>AEC</b>	ASEAN Economic Community
<b>AMS</b>	ASEAN Member States
<b>ASEAN</b>	Association of Southeast Asian Nations
<b>ASEC</b>	ASEAN Secretariat
<b>ATM</b>	ASEAN Tourism Ministers
<b>ATPMC</b>	ASEAN Tourism Professionals Monitoring Committee
<b>ATPRS</b>	ASEAN Tourism Professional Registration System
<b>ATFTMD</b>	ASEAN Task Force on Tourism Manpower Development
<b>CATC</b>	Common ASEAN Tourism Curriculum
<b>MRA</b>	Mutual Recognition Arrangement
<b>MTCO</b>	Mekong Tourism Coordinating office
<b>NTO</b>	National Tourism Organisation
<b>NTPB</b>	National Tourism Professional Board
<b>RQFSRS</b>	Regional Qualifications Framework and Skills Recognition System
<b>TPCB</b>	Tourism Professional Certification Board





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