Co-ordinate and operate a day-tour (or short excursions)

D2.TTG.CL3.05

Trainer Guide

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File name: TG_Coordinate_operate_a_day_tour_290415

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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

UNIT TITLE: CO-ORDINATE AND OPERATE A DAY-TOUR (OR SHORT EXCURSIONS)	NOMINAL HOURS: 60
UNIT NUMBER: D2.TTG.CL3.05	
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to conduct a one-day tour or short excursion involving multiple products and services to multiple sites.	

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE
Element 1: Prepare for the tour **1.1** Identify the *type of tour* to be conducted **1.2** Interpret *briefing information from the tour operator* **1.3** Describe the *specific issues to be considered* to ensure customer needs are met **1.4** *Liaise with colleagues* **1.5** Identify *potential risks* for the tour **1.6** *Identify and obtain specific resources* for individual tours **1.7** Develop *plans for the tour* **1.8** *Stow equipment and supplies* for the tour **Element 2: Conduct the tour** **2.1** *Brief customers* about tour **2.2** *Commence tour*	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to a tour guide conducting a one-day tour or short excursion involving multiple products and services to multiple sites, within the labour divisions of the hotel and travel industries and may include: Tour Operation Type of tour may be related to: • Half and full day tours • City or rural tours • Cultural tours or eco-tours • Adventure tours • Special interest tours. Briefing information from the tour operator may include: • Customer information

2.3 *Follow itinerary* for the tour **2.4** Provide *additional information and assistance* **2.5** *Engage with industry colleagues* during the tour **2.6** *Respond to issues arising* while on tour **2.7** *Deal with unexpected events and emergencies* **2.8** *Conclude tour* as planned **Element 3: Complete post-tour activities** **3.1** Complete *tour report and documentation* **3.2** *Process cash, vouchers and other charges* **3.3** De-brief with other tour staff **3.4** Pass on feedback received from customers to management	• Itinerary information • Supplier information • Special request notes • Tickets/vouchers or other travel documentation for guide and/or group • Supplier contact details • Optional tour information • Financial documents • Promotional materials • Warnings and advisories • Permissions and authorities that have been approved/obtained. Specific issues to be considered may be related to: • Types of customers • Customer special needs • Size of tour group • Length of tour • Specific itinerary requirements • Special requests • Style of commentary and/or activities required • Location of tour • Climate and environmental conditions • Equipment and resources required • Environmental and cultural considerations • Language considerations. Liaise with colleagues should relate to: • Obtaining information and help from colleagues on the basis of their experience • Obtaining assistance with planning activities • Asking colleagues to check decisions that have been made for the tour • Planning involvement of colleagues in the tour.

Potential risks may relate to:

- Customers, especially their personal health and capacity to participate in the tour
- Tour routes including terrain
- Climate/weather
- Activities to be undertaken
- Potential service delivery difficulties
- Timing constraints.

Identify and obtain specific resources should relate to listing and acquiring types and forms of physical resources required including:

- Vehicles and vessels
- Aircraft and other types of transport which may include live transport, bikes and motorbikes
- Camping and catering equipment including food, beverage and refreshments
- Safety equipment including first aid kits and communication equipment
- Recreational and activity equipment
- Maintenance equipment
- Educational equipment
- Cash
- Vouchers
- Naming and allocating staff to the roster required to conduct the tour including identification of roles and responsibilities based on experience, qualifications, training and integration of skill sets pertaining to human resources that may include:
    - Drivers
    - Tourist guides
    - Driver-guides
    - Hosts and hostesses
    - Campsite cooks
    - Interpreters
    - Camp and tour assistants

	• Quantifying physical resources, by number, amounts, values and volumes
	• Quantifying human resources, by number and hours.
	Plans for the tour may include:
	• Standard operating plans including their alignment with stated itinerary
	• Contingency plans
	• Emergency plans.
	Stow equipment and supplies refers to the physical loading of equipment and supplies into or onto each vehicle, or method of transport to be used and must include:
	• Complying with safe manual handling techniques
	• Complying with weight restrictions including vehicles and animals
	• Taking into account the terrain to be covered and the potential for items to shift during transit
	• Enabling ready access to equipment and items that will be required first and/or required in the event of an emergency
	• Following legislated and/or host enterprise procedures for the stowing of hazardous items which may include:
	▪ Sharp tools or equipment
	▪ Heavy items
	▪ Items made of or containing glass
	▪ Gas containers
	▪ Heat-sensitive aerosols
	▪ Medication
	▪ Petrol, fuel and other flammable materials
	• Securing equipment and supplies to prevent movement, as far as practicable.
	Brief customers may include:
	• Welcoming customers
	• Introduction of tour guide and crew to customers including identifying their roles and responsibilities
	• Presenting tour overview including description of itineraries, destination information, timing details, activities, meals/refreshments, and tour options

	• Distributing items including name badges, vouchers, handouts and brochures, safety equipment and/or clothing
	
	• Explaining tour requirements including required behaviours, applicable codes of conduct, safety and security issues, need for respect of local communities, cultures, people and the environment, level and nature of physical exertion required
	
	• Introducing and/or back grounding the tour including historical data, relevant details, contextual information, points of interest.
	
	Commence tour may include:
	
	• Loading customers/passengers onto transport including checking seat allocation
	
	• Checking customers have paid
	
	• Directing customers to the first destination/activity
	
	• Engaging with group participants
	
	• Encouraging participation
	
	• Generating confidence
	
	• Building credibility.
	
	Follow itinerary must include:
	
	• Ensuring all advertised destinations, activities including interpretive activities, products and services are delivered as promoted
	
	• Providing tour commentary
	
	• Optimising the tour experience for all customers
	
	• Monitoring, directing, controlling and, where necessary, modifying group and/or individual behaviour
	
	• Demonstrating principles of tour guiding:
	
	  ▪ Safety and security including people and property and the development of standard and contingency plans
	
	  ▪ Care and respect including for the tour group, locals and the environment
	
	  ▪ Skills, knowledge and ability to conduct/lead the tour
	
	  ▪ Relevant knowledge in relation to the tour including sites, destinations, environment and activities
	
	  ▪ Providing an interesting and engaging experience

	▪ Ethical conduct
	▪ Catering for the needs of those with special needs and individual differences.
	Additional information and assistance may relate to:
	• Local events and activities
	• Options for free time activities
	• General directions
	• Anecdotes recounting personal experiences
	• Local facilities.
	Engage may include:
	• Responding to requests for assistance
	• Asking for assistance
	• Liaising in order to make decisions
	• Providing support for the work of industry colleagues
	• Anticipating requests and responding proactively
	• Confirming forward bookings with venues, sites, destinations and providers including advising operators of expected arrival time, group numbers, special requests and timing constraints that may apply
	• Making payment to suppliers, providers and carriers for services and products rendered according to previously agreed arrangements, or as required.
	Industry colleagues will vary depending on the type of tour and may include:
	• Host communities including community leaders, elders and other designated spokespeople
	• Coach and other vehicle drivers
	• Tour managers
	• Local and independent guides

	• Carriers
	• Tour operators including office staff
	• Product suppliers and venues including hotels and restaurants, attractions and sites, and retail shops
	• Land owners and land managers
	• Representatives of statutory authorities.
	Respond to issues arising may include:
	• Deciding tour alternatives, where applicable, based on group preferences
	• Modifying and re-planning itinerary based on changed conditions, circumstances and/or customer requests and/or preferences
	• Adjusting timing to meet deadlines and pre-arranged arrival and departure times
	• Notifying customers of, and explaining, changes to initial itinerary
	• Notifying venues, sites, destinations and providers of revised itinerary, as necessary.
	Deal with unexpected events and emergencies may include:
	• Implementing contingency and/or emergency plans
	• Notifying authorities and/or emergency services to obtain assistance
	• Maintaining communication with customers to notify them of action to be taken in response to the unexpected event
	• Optimising the safety of customers including placing the safety of people above the protection of assets
	• Assuming authority, taking charge and issuing directives to customers
	• Taking action to minimise the adverse impact of the unexpected event on the conduct, and customer enjoyment of, the tour
	• Apologising for the event
	• Adhering to host enterprise policies and procedures with regard to not admitting liability and not promising recompense including referring customers to management, head office or to duty supervisor on arrival back at the departure point, where applicable.

	Unexpected events and emergencies should be planned for, as far as practicable, so that contingency plans can be put into effect when required. The nature of unexpected events and emergencies can vary with tour types and the specifics of individual tours and groups, but may include:
	• Systems failure including technical and equipment failure
	• Vehicle breakdown
	• Vehicle accidents
	• Injury, accident or death
	• Adverse weather conditions including the impact of adverse weather conditions in a near-by or associated area
	• Inappropriate customer behaviour
	• Unpredictable animal behaviour
	• Road closures
	• Closures of sites and unannounced restricted access to traditional areas.
	Conclude tour may include
	• Thanking tour group
	• Promoting other tours available through the same operator
	• Providing a tour summary, where appropriate
	• Collecting returnable items that were distributed to customers
	• Addressing complaints
	• Seeking verbal and written feedback
	• Escorting customers off/from vehicles.

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Co-ordinate and operate a day-tour (or short excursions)

Tour report and documentation may include:

- Vehicle usage books including distance travelled, locations visited, and fuel used/purchased
- Maintenance reports and requests
- Finalising details of tour that may include:
    - Departure and return times
    - Group numbers
    - Names of tour staff including hours worked
    - Destinations and sites visited
    - Details of deviations from scheduled itinerary including reasons for same
    - Details of complaints received
    - Details of action that had to be taken to address customer behavioural problems
    - Details of accidents and injuries
    - Details of any event where emergency services or authorities were contacted or involved
    - Suggestions for changes to future tours including rationale for same.

Process cash, vouchers and other charges may include:

- Reconciling money and vouchers
- Completing paperwork to support invoicing of charges to individual customers, as appropriate
- Forwarding documentation, as required, to the appropriate person/location for further processing or finalisation.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- Enterprise policies and procedures in regard to the co-ordination and operation of day-tours or short excursions
- Knowledge of the local tourism industry where tour occurs, and general tour industry knowledge
- Principles of guiding
- Ability to use first aid and emergency situation techniques
- Specific information regarding the tour being conducted
- Legal liability issues
- Hazard identification and risk management
- Communication, leadership, negotiation, conflict resolution and problem-solving skills.

Linkages To Other Units

- Work as a tour guide
- Conduct pre-departure checks
- Conduct interpretive activities in the field
- Develop and co-ordinate appropriate cultural tourism activity
- Establish and maintain safe touring conditions
- Lead tour groups in a responsible manner
- Manage and facilitate an extended tour experience
- Plan, develop and evaluate interpretive activities
- Plan, trial and implement minimal impact operations
- Prepare and present tour commentaries
- Provide arrival and departure assistance
- Research and share information on indigenous cultures
- Develop and update tourism industry knowledge.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures regarding the operation of day-tours and short excursions

- Demonstrated ability to undertake practical preparation activities and planning requirements necessary to prepare for the conduct of nominated tour type for a given itinerary to a designated group of customers

- Demonstrated ability to conduct a day-tour or short excursion of a nominated type for a designated group of people demonstrating the full range of roles, responsibilities and functions of a tour guide and ensuring the advertised activities and destinations are achieved

- Demonstrated ability to effectively deal with nominated unexpected events while conducting a tour ensuring that customer safety is preserved, communications with customers are maintained and adverse impacts on the tour and customer experience is minimised

- Demonstrated ability to conduct nominated post-tour activities which must include soliciting feedback from customers and colleagues; and completing designated documentation for the tour.

Context of Assessment

Assessment must ensure:

- Actual or simulated office environment for pre-tour and post-tour phases; and an actual (short) tour activity for the demonstration of practical tour guiding skills.

Resource Implications

- Training and assessment must include a real or simulated itinerary, real or simulated tour group profiles/details and access to a range of actual tour-related equipment, supplies and vehicles; and access to workplace standards, procedures, policies, guidelines, tools and equipment. Note that a representative, but not exhaustive range of equipment and supplies must be available to support demonstration of competency; but emergency and/or unexpected delays may be simulated.

Assessment Methods

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

- Observation of practical candidate performance
- Portfolio of documentation that may support planning and post-tour tour guiding activities
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively

Level 2 = competence to manage tasks

Level 3 = competence to use concepts for evaluating

Key Competencies	Level	Examples
Collecting, organising and analysing information	2	Prepare contingency and emergency plans for the tour
Communicating ideas and information	3	Explain tour-related details to customers prior to and during the tour
Planning and organising activities	3	Re-plan the itinerary during a tour due to unexpected delays/exigencies
Working with others and in teams	3	Liaise with tour crew prior to, during and post tour
Using mathematical ideas and techniques	1	Calculate times, distances, numbers and tour-related statistics
Solving problems	3	Resolve interpersonal disputes between customers while on tour
Using technology	1	Use tour equipment including items for travel, activities, safety and communication

Notes and PowerPoint slides

Slide

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

Slide

Co-ordinate and operate a day tour (or short excursions)

This Unit comprises three Elements:

- ⊙ Prepare for the tour
- ⊙ Conduct the tour
- ⊙ Complete post-tour activities

Slide 2

Slide No	Trainer Notes
2.	Trainer advises trainees this Unit comprises three Elements, as listed on the slide explaining: • Each Element comprises a number of Performance Criteria which will be identified throughout the class and explained in detail • Trainees can obtain more detail from their Trainee Manual • 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.

Slide

Assessment

Assessment for this unit may include:
- Oral questions
- Written questions
- Work projects
- Workplace observation of practical skills
- Practical exercises
- Formal report from employer/supervisor

Slide 3

Slide No	Trainer Notes
3.	Trainer advises trainees 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 to trainees the methods of assessment that will be applied to them for this Unit.

Slide

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

Slide

Element 1 – Prepare for the tour

- Identify potential risks for the tour
- Identify and obtain specific resources for individual tours
- Develop plans for the tour
- Stow equipment and supplies for the tour

Slide 5

Slide No	Trainer Notes
5.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide.
	Class Activity – General Discussion
	Trainer leads a general class discussion by asking questions such as:
	• What experience do you have in coordinating and conducting tours?
	• What do you think is involved in coordinating tours?
	• What do you think is involved in conducting tours?
	• What sort of emergencies might a tour need to prepare for?
	• What is meant by 'Duty of Care'?

Slide

Identify the type of tour to be conducted

Tour operator:
- ◉ A business providing tours to the public
  - • May be:
    - ▪ Single individual/person
    - ▪ A SMR/SMB which is locally based
    - ▪ A larger multi-national company

Slide 6

Slide No	Trainer Notes

6.	Trainer presents and explains industry term as shown on slide.
	Tour operator
	• A 'tour operator' is a business that provides tours to the public
	• The tour operator may be:
	  ▪ A single individual – working for themselves
	  ▪ An SME/SMB which is locally based
	  ▪ A larger multi-national organisation.

Slide

Slide 7

Slide No	Trainer Notes
7.	Trainer presents and explains industry term as shown on slide.
	Tour guide
	• A 'Tour Guide' is the person who conducts/takes the tour
	• They may be self-employed ('Independent guide') or employed by a Tour Operator
	• They are increasingly referred to as Tourist Guides to differentiate them from paper-based or electronic tour guide/books
	• Tour Guides are often referred to as 'the mortar that binds the tour together'
	• Some Tour Guides combine their guiding skills with other competencies – for example:
	▪ A Driver Guide would drive the tour vehicle as well as perform the guiding duties required for the tour
	▪ A Cook Guide would cook and serve food at meal times.

Slide

Identify the type of tour to be conducted

Tour group members – may be referred to using different names which vary between Tour Operators:

- Customers
- Guests
- Tour party
- Passengers
- Pax

Slide 8

Slide No	Trainer Notes
8.	Trainer presents and explains industry term as shown on slide.
	Tour group members
	• The people who go on a tour are referred to by a range of names
	• These names can vary between employers/Tour Operators
	• Commonly used terms are:
	▪ Customers
	▪ Guests
	▪ Tour group members
	▪ Tour party
	▪ Passengers
	▪ Pax.

Slide

Identify the type of tour to be conducted

'Coordinating' a tour refers to activities involved in:

⊙ Organising, preparing for and making necessary arrangements in relation to a tour

⊙ Finalising requirements at the end of a tour as required by the organisation

Slide 9

Slide No	Trainer Notes
9.	Trainer presents and explains industry term as shown on slide.
	Coordinating a tour
	'Coordinating a tour' refers to the activities involved in:
	• Organising and preparing for a tour – such as:
	▪ Identifying and confirming the itinerary for the tour
	▪ Determining special needs/requirements for the tour
	▪ Undertaking standard pre-tour risk management
	▪ Developing operational, emergency and contingency plans for the tour
	▪ Integrating the scheduling of individual tours with other scheduled tours
	▪ Identifying and obtaining resources required for the tour
	▪ Loading the tour vehicle/s with required resources for the tour
	• Finalising requirements at the end of a tour – such as:
	▪ Completing required end-of-tour documentation and reports
	▪ Soliciting customer feedback about the tour and their experience
	▪ Processing cash, vouchers and tour-related charges
	▪ De-briefing with other tour and organisational staff and/or stakeholders
	▪ Notifying management of issues requiring attention
	▪ Communicating customer feedback about the tour and the Tour Operator to management
	• The precise nature of tasks/responsibilities will vary between Tour Operators and tour types.

Slide

Identify the type of tour to be conducted

'Operating/conducting a tour' involves:

- ⊙ Conducting pre-tour briefing
- ⊙ Starting the tour and running it according to the itinerary
- ⊙ Providing information during the tour
- ⊙ Assisting members of the tour group/party
- ⊙ Responding to on-tour issues, unexpected events and emergencies
- ⊙ Concluding the tour when it has been completed

Slide 10

Slide No	Trainer Notes
10.	Trainer presents and explains industry term as shown on slide.

Operating a tour

'Operating a tour' (also called 'conducting a tour') refers to performing on-tour activities such as:

- Conducting pre-tour briefing with tour group members
- Starting the tour and running it according to the itinerary
- Providing information to the tour party during the tour – which may include:
    - Delivering a scripted commentary
    - Adding extra detail as circumstances indicate
    - Answering questions
- Assisting those who are on the tour – with a wide range of things such as:
    - Boarding and getting of vehicles
    - Helping with their bags
    - Meeting special needs requirements
- Responding to on-tour issues, unexpected events and emergencies
- Concluding the tour when it has finished – according to enterprise requirements regarding activities such as (for example):
    - Reviewing the tour
    - Thanking group for their attendance/participation
    - Capturing customer feedback
    - Distributing merchandise and promotional materials
- The precise nature of tasks/responsibilities will vary between Tour Operators and tour types.

Slide

Identify the type of tour to be conducted

Itinerary:

- Is the plan for the tour
- Customers receive a copy
- Shows where the tour will go and what the tour group members will do/experience on the tour

Industry dictionaries:

- Exist to define many more industry terms, phrases and acronyms

Slide 11

Slide No	Trainer Notes
11.	Trainer presents and explains industry term as shown on slide.
	Itinerary
	• An itinerary is the plan for a tour
	• Itineraries are developed and advertised for all tours
	• Tour group members are provided with a copy of the itinerary when they make enquiries about a tour and/or when they buy a ticket.
	Industry dictionaries
	• To help define industry terms there are several online and hard copy dictionaries.
	Classroom Activity (1) – Handouts
	Trainer distributes and discusses sample tour itinerary.
	Classroom Activity (2) –Internet Research
	Trainer supervises internet access so students can visit and study relevant websites such as:
	• http://www.travel-industry-dictionary.com/
	• http://www.traveljargon.org/.

Slide

Identify the type of tour to be conducted

Tours may be classified by their duration:
- Short tours
- Full-day tours
- Overnight tours
- Multi-day tours

Slide 12

Slide No	Trainer Notes
12.	Trainer explains there is a variety of ways in which tours may be classified.
	Duration-based tours
	Duration of tours/trips may be:
	• Short tours – the duration of these will differ between providers and can vary from half-an-hour to half-a-day
	▪ These are sometimes referred to as 'Excursions'
	• Full-day tours – where the tour departs and returns same calendar day and the tour duration is around 8 – 10 hours
	▪ These are also known as 'Day Trips'
	• Overnight tours – where the tour departs one day and returns the next, but occurs within a 24-hour period
	• The above three types of tours are covered by this unit
	• Multi-day tours – where the tour party has more than one night away
	▪ While these tours are not the focus of this unit it is worthwhile knowing they exist, and what they are
	▪ Common lengths are between 2-days to 14-days
	▪ These are also known as 'Extended' tours.
	Classroom Activity – Handouts
	Trainer distributes and discusses tour itineraries and/or advertisements for the tour types identified on the slide.

Slide

Identify the type of tour to be conducted

Site-based tours:
- Museums, historic sites and galleries tours
- Zoos, preserves and wildlife parks tours
- Gardens, parks, forests and national parks tours
- Tours of factories, businesses, production and processing plants
- Tours of government and semi-government utilities

Slide 13

Slide No	Trainer Notes
13.	Trainer explains tours may also be classified as:
	Site-based tours
	Site-based tours may include:
	• Museums, historic sites and galleries tours
	• Zoos, preserves and wildlife parks tours
	• Gardens, parks, forests and national parks tours
	• Tours of factories, businesses, production and processing plants
	• Tours of government and semi-government utilities – including power-generating stations, reservoirs and waste-water treatment plants.
	Classroom Activity – Handouts
	Trainer distributes and discusses tour itineraries and/or advertisements for the tour types identified on the slide.

Slide

Slide No	Trainer Notes
14.	Trainer explains tours may also be classified as:
	Special interest tours
	Special interest tours can include:
	• Photography tours
	• Wildlife tours
	• Aerial tours
	• Parks and gardens tours
	• Sport events/tours – including as participants and observers
	• Flora and fauna tours
	• Wine and food tours
	• Tours of nominated geographical regions, areas and destinations
	• Scientific and educational tours.
	Classroom Activity – Handouts
	Trainer distributes and discusses tour itineraries and/or advertisements for the tour types identified on the slide.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Slide

37

Identify the type of tour to be conducted

Water-based tours:
- ⦿ Cruises
- ⦿ Boating and yachting trips
- ⦿ Snorkelling
- ⦿ Scuba diving
- ⦿ Fishing tours

Slide 15

Slide No	Trainer Notes
15.	Trainer explains tours may also be classified as: **Water-based tours** Water-based tours include: • Cruises • Boating and yachting trips • Snorkelling • Scuba diving • Fishing tours. **Classroom Activity – Handouts** Trainer distributes and discusses tour itineraries and/or advertisements for the tour types identified on the slide.

Slide

Slide No	Trainer Notes
16.	Trainer explains tours may also be classified as:
	Land-based tours
	Land-based tours include:
	• Four-wheel drive tours
	• Remote area tours
	• Rail tours
	• Bus/coach tours
	• Bicycle and motor bike tours
	• Walking tours
	• Horse and camel
	• Caravan and camper tours.
	Classroom Activity – Handouts
	Trainer distributes and discusses tour itineraries and/or advertisements for the tour types identified on the slide.

Slide

Identify the type of tour to be conducted

Ways to identify the type of tour to be conducted:
- Look at/read the tour schedule
- Talk to management
- Read contracts, advertisements and customer feedback from previous tours
- Read the tour briefing material/information – as/if provided by management or administration

Slide 17

Slide No	Trainer Notes
17.	Trainer indicates identifying the type of tour to be conducted can be done by: • Looking at the tour schedule – this is a list of the tours planned for the Tour Operator showing name/title of the tour together with dates and departure and return times ▪ Many day tours/short excursions are repeat versions of the tours which were conducted yesterday, the day before and so on, making it easy for Tour Guides to determine the needs of a tour simply by obtaining the name and time of the tour • Talking to management – this is an essential requirement: ▪ For new tours which have never been conducted before ▪ For one-off, custom or private tours – where the itinerary has been negotiated with a specific client/group and the Tour Operator has promised to deliver nominated experiences, destinations, activities and similar • Reading relevant documentation – such as: ▪ Contracts for one-off, custom or private tours ▪ Advertising/promotional materials for the tour ▪ Customer feedback from previous similar tours • Analysing briefing information for the tour – see next section.

Classroom Activity– Internet Research

Trainer supervises internet access so students can visit and study relevant websites such as:

- http://www.affordabletours.com/search/Type/ - Different tour types at Affordable Tours.com
- http://www2.amk.fi/digma.fi/www.amk.fi/opintojaksot/050809/1184649944500/118464 50138999/1184654457131/1184654823506.html - Types of Tours (VirtuaaliAMK Tourism Intermediaries)
- http://www.theguardian.com/travel/typesoftrip - Types of Trips (The Guardian)
- http://www.jobmonkey.com/landtours/html/types_of_tours.html - Tour Guide Jobs: Types of Tours
- http://psna.ru/index.php?p=ekskursovod&st=en8 – Classifications of Tours

Slide

Interpret briefing information from the tour operator

Ways to obtain briefing information:
- Attending a face-to-face briefing session
- Logging on to an internal system/database
- Being provided with hard copy information

Slide 18

Slide No	Trainer Notes

18.	Trainer identifies the tour brief/briefing information may be obtained by Tour Guides in one of several ways such as:
	
	• Attending a face-to-face briefing session with management – where verbal advice is provided and supplemented with hard copy handouts of certain details
	 ▪ Logging on to an internal database/intranet – where all relevant detail is loaded onto a file/folder on a tour-by-tour basis
	 ▪ Access to these tours/information sources may be:
	  – Restricted only to Tour Guides who are scheduled to lead the tours
	  – Controlled by Username and Password access protocols
	• Being provided with hard copy information – which may be:
	 ▪ Distributed at staff meetings
	 ▪ Handed out when staff log on for the start of their shift/work
	 ▪ Placed in individual staff pigeon holes for staff to collect when they begin their shifts
	 ▪ Pinned to a notice board.

Slide

Interpret briefing information from the tour operator

Interpreting briefing information refers to:

◉ Differentiating between individual tours which are similar

◉ Using details in the brief to help develop, plan and prepare for the tour

◉ Determining and calculating required resources

◉ Working out parameters for the tour

Slide 19

Slide No	Trainer Notes

19.	Trainer explains 'Interpreting the briefing information' refers to:
	• Identifying what applies to individual tours that may have the potential to make similar tours, different
	• Incorporating the details contained within the information to help develop, plan and prepare for the tour
	• Using the information to:
	  ▪ Determine the needs/requirements of the tour in terms of resources and inclusions
	  ▪ Work out the parameters/limitations and/or restrictions which apply to a tour.

Slide

Interpret briefing information from the tour operator

Context of briefing information:

- May not be provided for all tours, tours which are very short and tours where there is no route variation
- Details are certainly provided for one-off (custom and private) tours and for Tour Guides taking their first tour of any kind

Slide 20

Slide No	Trainer Notes
20.	Trainer discusses briefing information
	Context
	• Many, many day tours/short excursions have little or no briefing information provided to Tour Guides. This is certainly the case for:
	▪ Very short tours in terms of duration
	▪ Tours which cover relatively short distances
	▪ Tours where there is no variation in route, timing, destinations, travel arrangements and inclusions
	• Briefing information is certainly provided where:
	▪ The tour is a special one – a one-off tour or a customised or private tour
	▪ It is the first time a Tour Guide has conducted the tour
	▪ There is a known variation (special request, problem or issue) which needs to be accommodated and/or integrated into the tour.

Slide

Interpret briefing information from the tour operator

Briefing content may address:
- Customer information
- Itinerary
- Supplier information
(Continued)

Slide 21

Slide No	Trainer Notes

21.	Trainer states Briefing information from the tour operator may include:
	
	 • Customer information – which can include:
	     ▪ Numbers; Names – of individual people, and/or the name of clubs, groups or organisations to which they belong; Gender/s; Age profiles – adults, children and infants
	        – A manifest may be provided with this information **but this is not always the case** with day tours/short excursions as many operate only on the basis of 'tickets sold' with no further information obtained from tour party members
	
	 • Itinerary information – this will address matters such as:
	     ▪ Dates and times – of travel (arrivals and departures) as well as tour time; Destinations; Activities; Modes of travel to be used – the tour may be a walking tour or there may be 'just one' or more than one forms of transport/travel
	     ▪ May also detail name of vessel and/or flight number
	     ▪ Terms and conditions – for carriers and other service providers
	     ▪ There is commonly a statement/term advising customers the itinerary is subject to change without notice and the Operator reserves the right to amend the tour/substitute activities/inclusions as required by circumstances which arise
	     ▪ Specific requirements relating to the travel/destinations – such as Visa requirements; Health issues; Time to arrive prior to departure; Customs and immigration requirements
	
	 • Supplier information – this can relate to details about third party providers who are used by the Tour Operator to deliver certain goods and/or services to the tour group

	- Goods/services may include food and beverages, transportation, activities, rides, experiences, products: any item required to be included as part of the tour may be supplied by a third party provider - Supplier information may include information such as: - Their name and contact details - Name of a contact person - Details of deals/arrangements negotiated with the providers in terms of issues such as numbers, times and prices. **Classroom Activity – Handout** Trainer distributes and discusses sample manifest

Slide

Interpret briefing information from the tour operator

- Special request notes/notifications
- Tickets/vouchers and travel documentation required
- Operational tour information
(Continued)

Slide 22

Slide No	Trainer Notes

22.	Trainer continues discussing content of briefing information:
	
	• Special request notes – these notes advise the Tour Guide about requests made by tour group individuals and/or groups
	
	• Tickets/vouchers or other travel documentation for guide and/or group – most tours will require some form of practical tour documentation
	
	  ▪ These refer to documents taken on-tour by the Tour Guide which have been pre-paid/bought by the Tour Operator and can be used/exchanged for nominated goods and services such as:
	    – Entry to attractions
	    – Rides
	    – Food and beverages
	    – On-tour travel
	    – The Tour Guide may distribute these tickets/vouchers to members of the tour party for them to use as and when they like, or the Tour Guide may retain them and 'pay' (use the tickets/vouchers) as required on behalf of the tour group
	
	• Operational tour information – this information is:
	  ▪ Specific to the individual type and nature of the tour – it is not *generic* in nature
	  ▪ Specific to the day/time of the tour – taking into account factors which emerge and change over time (such as weather, road conditions, political issues)
	  ▪ Provided in hard copy form and updated as necessary in response to identified/known issues and factors

	▪ Operational tour information can be provided in the form of: – Permissions and authorities that have been approved/obtained as they relate to tour destinations and activities – Warnings and advisories – Standard operating plans – Emergency plans – Contingency plans. **Classroom Activity – Handouts** Trainer distributes and discusses tour briefings and associated documentation as identified on the slide.

Slide

Interpret briefing information from the tour operator

- ◉ Financial documentation
- ◉ Optional information
- ◉ Promotional materials

Slide 23

Slide No	Trainer Notes
23.	Trainer continues discussing content of briefing information: • Financial documents – many day tours/short excursions will require the Tour Guide to be provided with some way to pay for on-tour expenses. In addition to payment using tickets/vouchers (identified above), the Tour Guide may be provided with: ▪ A Charge/credit card provided by the Tour Operator ▪ Cash ▪ Letter/s of authority for the Tour Guide to make purchases from nominated suppliers in-keeping with arrangements/lines of credit which have been previously established • Optional tour information – it is standard for most tours to provide tour group members with items such as: ▪ Information about the country, region, destinations and attractions ▪ Fact Sheets about history, religion, culture, geographical aspects, weather, flora and fauna ▪ Advice – about safety, shopping, money exchange, local customs and laws ▪ FAQ sheets – providing answers to 'Frequently Asked Questions' ▪ Maps • Promotional materials – this is information from the Tour Operator and business partners given out by the Tour Guide (along the way and/or at the end of the trip). The promotional material might take the form of: ▪ Vouchers and coupons ▪ Brochures and flyers ▪ Merchandise – such as pens, caps, bags.

	Classroom Activity – Handouts
	Trainer distributes and discusses tour briefings and associated documentation and items as identified on the slide.

Slide

Describe issues to be considered to ensure customer needs are met

In general:
- ◉ Tour Operators will want/strive to meet customer needs
- ◉ Not all 'special requests' can be met – due to issues relating to topics such as:
  - • Cost
  - • Time
  - • Safety

Slide 24

Slide No	Trainer Notes
24.	Trainer presents context for Tour Operators meeting customer needs stating: • All Tour Operators and Tour Guides will strive to meet specific requests made by customers on a day tour or short excursion ▪ Indeed, many operators will actively encourage customers to advise of special requests and issues they want taken into account ▪ This said, however, not all special requests and specific issues can be accommodated. This is due to the fact many requests have inherent cost, time and safety-related issues which are unable to be met. For example: – There may be an unacceptable cost associated with meeting the request – and the Tour Operator is unwilling to absorb this expense and/or unable to pass it on to the customer/s – It may be impossible to fit the request into the schedule as prescribed by the duration (that is, the start and finish times) of the tour – Safety concerns may mean the requested activity/inclusion cannot be accommodated – as it would pose a risk the Tour Operator is unwilling to accept and/or unable to effectively manage.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Slide

Slide 25

Slide No	Trainer Notes
25.	Trainer differentiates between 'scheduled' and 'one-off' tours stating: **Scheduled tours** • 'Scheduled tours' are those which are time-tabled and advertised to run at set times on set days • They are conducted on a regular basis and essentially follow the same itinerary, tour after tour • In practice the number of specific issues/special requests which need to be considered for these tours are usually relatively few – day tours and short excursions are usually accepted/taken by customers who accept them on 'as is' basis.

Slide

Describe issues to be considered to ensure customer needs are met

'Custom/private' tours:
- Are one-off in nature
- Will accommodate much more ('everything') in terms of special needs regarding all/most matters, such as:
  - Destinations, activities and inclusions
  - Times/timing requirements
  - Routes and methods of transport

Slide 26

Slide No	Trainer Notes
26.	Trainer continues differentiating between 'scheduled' and 'one-off' tours stating: **Custom/Private tours** 'Custom/Private tours' are one-off tours developed to meet the requirements of a specific client who (often/usually) may: • Request nominated inclusions – in terms of (say): ▪ Destinations ▪ Activities ▪ Catering • Specify departure and finish times on a certain date • Require a given route and mode of travel/transport • Provide the numbers for the tour • Obviously these tours are significantly impacted by client demands and will be developed and coordinated totally to align with these identified needs.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Slide

Describe issues to be considered to ensure customer needs are met

Reasons Tour Operators want to meet customer needs:

- Optimise their satisfaction with their tour experience
- Increase the chance of repeat business and referral business
- Provide enhance value-for-money
- Maintain and grow the reputation of the business

Slide 27

Slide No	Trainer Notes
27.	Trainer explains Tour Operators will want to meet customer needs in order to: • Optimise their satisfaction with their tour experience • Increase the chance of repeat business and referral business • Provide enhance value-for-money • Maintain and grow the reputation of the business. **Class Activity – Guest Speaker** Trainer arranges for manager/owner of local business to attend and talk about: • Coordinating and operating short tours • Planning and preparation for same • Tips on conducting tours • Reasons for satisfying/meeting customer needs • Examples of how they meet special needs.

Slide

Slide 28

Slide No	Trainer Notes

28.	Trainer explains Special requests may be received:
	• In advance as a result of:
	  ▪ Emails and/or phone calls received
	  ▪ Discussions undertaken when management negotiated the contract for a custom/private tour
	• On the day – when tour group members assemble or when they attend the pre-tour briefing.

Slide

Slide No	Trainer Notes
29.	Trainer indicates common categories of requests relate to:
	• Visiting a destination not listed on the itinerary
	• Participating in a nominated activity – such as meeting certain people; food tasting; shopping; taking part in a sporting activity
	• Spending more (or less) time than advertised at a destination or attraction
	• Swapping an activity/inclusion on the itinerary for a preferred alternative
	• Needing certain food as a consequence of a medical condition or due to cultural, religious or lifestyle preference
	• Taking an alternate route to arrive at a destination/attraction.

Slide

Describe issues to be considered to ensure customer needs are met

SOPs for Tour Operators may be:
- Tour Guides have a degree of discretionary authority to respond to special requests
- Management may be required to approve changes which need to be made to accommodate any special requests

Slide 30

Slide No	Trainer Notes
30.	Trainer explains in relation to special requests it is common for: • Management to give Tour Guides some discretion to determine whether or not they accommodate requests of this kind without the need to contact them for permission – in these cases Tour Guides are expected to apply their industry and local knowledge and common sense to determine what can and cannot be done • Management approval to be obtained before making the final decision to accommodate special requests where there is likely to be added costs and/or significant departure from the standard itinerary for a scheduled tour/excursion.

Slide

Describe issues to be considered to ensure customer needs are met

Planning should factor in types of customers on tour, if known – considerations may relate to:

⊙ Age of participants

⊙ Size of the group

Slide 31

Slide No	Trainer Notes
31.	Trainer highlights planning the tour should also consider the types of customers who will be taking the tour.
	• This is not known for many tours (especially standard/scheduled ones) but is common for custom/private tours
	• 'Types of customers' refers to any known characteristics relating to tour group members such as:
	▪ Age of the group and/or individuals – this can indicate matters relating to:
	– Appropriate activities and destinations to be included
	– Mobility and how this may impact timing of the tour
	– Safe travel
	– Food preferences
	▪ Size of tour group – which has implications for:
	– Resources required
	– Transportation used
	– Timing of the itinerary – as it takes longer to muster, board and disembark a large group than a small one
	– Bookings to be made at third party providers/destinations/caterers.

Slide

Describe issues to be considered to ensure customer needs are met

Attention also needs to be paid to special needs relating to:

- People with physical disabilities
- Customers with problems understanding (reading/interpreting) the local language

Slide 32

Slide No	Trainer Notes
32.	Trainer notes where customers have special needs the Tour Operator may be advised in advance of their needs.
	Special needs may relate to:
	• People with physical disabilities – which may mean:
	▪ Making provisions for carers
	▪ Providing specialist items and equipment such as wheelchairs, portable ramps and (for vision impaired people) information sheets in Braille
	▪ Liaising with destinations/attractions to confirm their capacity to cater for the identified disabilities or to arrange viable alternatives
	• Language issues – which can influence/indicate the need to:
	▪ Provide an interpreter
	▪ Select a Tour Guide with appropriate language skills
	▪ Provide written materials in another language/several languages.

Slide

Describe issues to be considered to ensure customer needs are met

There is a need to know start and finish times for tours to:

- Determine 'duration' which influences need for food/refreshments, and quantity of resources required
- Work out if tour takes place at night
- Integrate everything with other tours
- Ensure tour is delivered 'as advertised'

Slide 33

Slide No	Trainer Notes
33.	Trainer offers those with responsibility for planning/coordinating day tours and short excursions need to know when the tour starts and finishes in order to: • Determine the duration of the tour – which will impact: ▪ Need to provide food and beverages ▪ Amount of resources required • Identify if the tour/excursion will take place at night – which has implications for: ▪ Provision of torches/lamps for tour group members ▪ Selection of tour vehicle to ensure they have required lights • Integrate the requirements and resources for one tour with the requirements and resources for other tours – so optimum use is made of Tour Operator resources • Deliver on advertisements made about the tour in promotional materials – so the tour delivers the product customers were legitimately entitled to expect based on what was promised.

Slide

Describe issues to be considered to ensure customer needs are met

'Inclusions' must be considered for custom/private tours as they have the potential to impact matters relating to:

- Commentary in terms of type, content/focus and delivery method
- Activities
- Destinations and attractions
- Ancillary issues

Slide 34

Slide No	Trainer Notes

34.	Trainer observes inclusions in scheduled tours are standard and generally are not subject to change unless prior advice and negotiation has occurred, highlighting where a Custom/Private tour is organised there is usually a requirement the tour is tailor-made in terms of:
	
	• Commentary – meaning the Tour Guide may need to:
	    ▪ Focus commentary on certain aspects as required/preferred by the client – this may mean, for example, developing a new or revised scripted commentary which might concentrate on:
	        – Culture, and/or History, and/or Food/dining, and/or Flora and fauna, and/or Businesses, and/or Any topic/s identified by the client
	    ▪ Forward a draft of the prepared scripted commentary to the client – for their approval and/or comment
	    ▪ Revise, rehearse and practice the scripted commentary – and develop appropriate supporting printed materials/handouts
	    ▪ Engage the services of an external specialist – who has specialty knowledge and expertise in the areas identified by the client as being the necessary focus for the commentary
	• Activities – these activities may:
	    ▪ Be suggested/identified by the client – as an essential element of the tour: for example, a business client may require team building or 'trust' activities
	    ▪ Have to be developed to align with the particular focus and/or known requirements for the trip
	    ▪ Need to be generated within a specific budget – to ensure the viability of the Tour Operator: there is never a situation where there is an unlimited budget for activities

	▪ Have to be organised and arranged with a destination, attraction or other third party provider
	• Destinations and attractions – most Custom/Private tours will specify (or give an indication of preferences for) destinations and attractions they want to visit
	▪ Commonly clients want to visit more destinations and attractions than it is practical to see in the time available and it is important the client understands the longer the tour takes, the more expensive it will be: time is money – the wages of the Tour Guide/s and staff have to be paid
	• Ancillary issues – these can relate to the need to:
	▪ Supply catering, food and beverages
	▪ Arrange guest speakers to talk to groups
	▪ Provide nominated merchandise to tour group members.

Slide

Describe issues to be considered to ensure customer needs are met

Geographic location of tour must also be known as this may impact planning when tour is to:

- ⊙ Involve/include another country
- ⊙ Visit a location where a special vehicle is required
- ⊙ Involve an area where there is/may be extreme weather and/or public unrest

Slide 35

Slide No	Trainer Notes
35.	Trainer stresses attention must also be paid to geographical location of *some* tours in terms of countries and destinations explaining this issue impacts planning when the day tour is to: • Involve/include another country – meaning there can be a need to: ▪ Identify passport and visa requirements ▪ Determine customs and immigration requirements ▪ Become aware of relevant laws ▪ Notify tour group members in advance so they can be properly prepared to meet the requirements of the country being visited • Visit a location where specialist vehicles may be required – to transport tour groups in and out • Involve an area where it is known certain events have taken place which can impact on the conduct of the tour – these events may include: ▪ Extreme weather events – especially: – Severe rain, wind and/or storms in the area and/or in adjacent areas/regions – Extended periods of extreme heat, humidity or cold ▪ Public unrest.

Slide

Slide No	Trainer Notes
36.	Trainer stresses all Tour Operators will seek to conduct their tours in an environmentally sensitive manner.
	• In some cases, this is a requirement under a Code of Conduct to which the organisation subscribes
	• Issues which relate to the environment and which might impact on meeting customer needs can include:
	▪ Closure of certain areas by authorities or communities – as a result of, say, erosion or over-use
	▪ Temporary weather/environmental conditions which are negatively impacting an area – and have the potential to cause problems, disrupt tours or raise safety issues
	• Knowing these factors has the potential to force a re-think of routes which can be taken, activities at the locations involved, and/or generation of alternate destinations.

Slide

Describe issues to be considered to ensure customer needs are met

There is also a need to consider the resources for every tour – in terms of :

- ⊙ Physical resources
- ⊙ Financial resources
- ⊙ Human resources
- ⊙ Information

Slide 37

Slide No	Trainer Notes
37.	Trainer explains another important consideration involves the equipment and physical resources required for the tour giving the four classifications of resources exist which are necessary for tour operations:
	• Physical resources – these are the goods/assets needed. They include items such as:
	▪ Vehicles; Camping equipment; Cooking equipment; Food and beverages; Maps, information sheets and Fact Sheets
	• Financial resources – these are the funds that will be needed to enable the tour to process as planned and operate in whatever circumstances are experienced. Financial resources can include:
	▪ Cash/local currency; Cash in currencies of various countries to be visited; American dollars; Travellers' cheques
	• Human resources – these are the staff provided to support the tour. They can be internal or external and might include:
	▪ Tour Leaders; Tour guides; Drivers; Cooks; Security
	• Information – this is the knowledge required to facilitate tour operations and activities. It includes:
	▪ Local knowledge; Knowledge of countries, carriers, currencies and cultures; Knowledge of all attractions and destinations to be visited; Knowledge of routes and sights; Knowledge of SOPs that tour staff are required to comply with.

Slide

Describe issues to be considered to ensure customer needs are met

Allocation of tour resources is usually determined in one of two ways:

◉ Pre-determined by management and listed on Loading Sheets for individual tours

◉ Calculated on a tour-by-tour basis

Slide 38

Slide No	Trainer Notes
38.	Trainer details allocation of resources for day trips/short excursions is usually determined in one of two ways:
	• Resources are pre-determined by management for scheduled/regular tours/excursions and allocated/loaded regardless of (all) other factors – these resources are listed on a printed Loading Sheet prepared for each tour
	• Resources are calculated for every trip/tour based on multiplying identified resource needs by the number of tour group members.

Slide

Liaise with colleagues

Three classifications of people need to be liaised with as part of the planning process:
- Management
- Administration
- Staff who have been on-tour

Slide 39

Slide No	Trainer Notes
39.	Trainer discusses those who need to be liaised with:
	Management
	Management must/should be involved in discussions:
	• To obtain the benefit of their knowledge and insight
	• To determine their expectations relating to the tour
	• To identify arrangements they may have made with joint-venture partners
	• To identify special requirements made with groups and 'special arrangements' made/contracted
	• To gain an appreciation of their context for the tour and how it fits within the total menu of offerings
	• To communicate personal thoughts and concerns relating to tour resourcing
	• To obtain necessary authorisations and approvals to proceed with the tour.
	Administration
	Administration must also be involved in the process:
	• To determine operational/working parameters for the tour
	• To obtain budget data – funding amounts, budget codes and similar
	• To capture data/figures relation to previous similar tours – to use for basis and comparison purposes
	• To identify human resources available for the tour
	• To determine paperwork/documentation to be completed
	• To assist with optimising use of limited resources.

Other staff

There is need to engage in discussions with other employees who have been involved with similar tours to:

- Obtain their advice about what is needed – in terms of:
    - Identifying and quantifying resources required
    - Where resources can be obtained when on-tour
    - Feedback they have received from tour group members who have been on the tours being organised
- Learn from the lessons they have learned from conducting previous tours
- Identify and/or confirm resources being prepared or allocated
- Gain a better 'feeling' for the requirements of the tour
- Ensure items **not listed** on internal documentation/checklists *but which are required* are addressed.

Slide

Slide 40

Slide No	Trainer Notes
40.	Trainer indicates in addition to other topics which have already been identified, discussion with colleagues should address: • Analysing operational issues – which needs to address: ▪ Matters and issues to be undertaken ▪ Timing of such activities ▪ Location of these events ▪ Extent of involvement/engagement by staff, tour group members and external operatives ▪ Equipment and other resources required for each individual 'operational issue' ▪ Risks and risk assessment and management ▪ Action taken by staff to: – Identity, prevent and predict issues; Address and respond to issues; Report and investigate issues ▪ Integration of a range of operational matters across all tour types in order to: – Enhance customer experience; Optimise use of resources through sharing and effective scheduling • Considering how lack of resources impacts the tour and the tour group members – these effects may include: ▪ Services listed on itineraries may not be able to be provided at scheduled/advertised times ▪ Tour dates, schedules and itineraries may need to change where there is a reduction in staff to conduct tours, and/or insufficient physical resources

	▪ Capacity of tour to deliver activities and inclusions as advertised/as contracted – which may mean:
	  − Reduction in services; Lowering of quality/standards; Shortening of time allocated
	▪ Safety issues – as it relates to:
	  − Travel and transport; Engagement with scheduled activities; Safety of PPE and other items provided by the operator for use (by staff and tour group members) when on-tour
	• Identifying *emerging* resource needs for scheduled tours – in order for the tour organisation to maintain its market position, viability and general image it is vital employees assist by identifying these needs and taking whatever action they can to ensure these requirements are met. Keys in this process are:
	▪ Reading customer feedback from tour group members who have completed previous/similar tours
	▪ Talking to the Tour Guides/Tour Leaders who conducted previous/similar tours
	▪ Taking similar tours conducted by other tour organisations – to see what they are doing, what they are offering
	▪ Ensuring there is a full understanding of all promises made by the tour company to tour group members by:
	  − Maintaining full awareness of advertisements regarding tours to be conducted and inclusions
	  − Taking the time to secure total awareness of all tour-related guarantees.

Slide

Identify potential risks for the tour

All businesses and employees have a common law Duty of Care to:

⊙ Create a safe working and/or touring environment

⊙ Take action to avoid causing foreseeable harm

Slide 41

Slide No	Trainer Notes
41.	Trainer backgrounds this section explaining all businesses and employees have a common law Duty of Care to:
	• Create and maintain a workplace or (touring) environment that does not pose a risk to people (staff, members of the public, customers)
	• Take action to avoid causing foreseeable harm to people/customers/tour group members or their property/belongings
	• This requirement applies to all organisations.

Slide

Identify potential risks for the tour

If Duty of Care is breached and injury/damage results:

- Legal action may be initiated
  - People can sue for damages alleging:
    - Negligence
    - Breach of contract
    - Defamation

Slide 42

Slide No	Trainer Notes
42.	Trainer explains where the Duty of Care is breached – and injury and/or loss results: • The employer and/or staff responsible can expect severe penalties to apply if those affected take legal action under civil law to seek recompense • When a person takes legal action under Civil law they 'sue' the other party usually for things such as: ▪ Negligence – which has caused loss or injury ▪ Breach of contract – where (for example) believes their tour/excursion did not deliver what was advertised/promised ▪ Defamation – where someone says/writes something defamatory about another person/business.

Slide

Slide 43

Slide No	Trainer Notes
43.	Trainer introduces risk management as a way of making sure there is no breach of Duty of Care stating: • Risk can be seen as any hazard or source of danger with the potential to adversely impact on the operation and/or outcomes of a tour/excursion • Risk management is the term used to describe the activities and practices the business undertakes to address those hazards or sources of danger • Formal risk management requires the Tour Operator to undertake a structured procedure comprising three basis steps/stages: ▪ Risk identification – where action is taken to determine all possible risks which might apply/pertain to the tour/excursion ▪ Risk analysis and assessment – where identified risks are considered to determine the threat they pose in terms of likelihood of occurrence coupled with potential consequence ▪ Risk control – where acceptable/suitable protocols are provided to effectively manage the identified risks.

Slide

Identify potential risks for the tour

There is also a need for tours to comply with relevant legislation:

- As they apply to specifically to trips and tours
- As they apply in the home/host country
- As they apply in any countries visited by the group
- As they apply to any activities/inclusions

Slide 44

Slide No	Trainer Notes
44.	Trainer highlights: • There is also a need to ensure all employees and tours/excursions must comply with all relevant legislation • In practice this means Tour Operators and Tour Guides/Leaders must identify and meet all requirements and regulations: ▪ Applicable specifically to tours/excursions and Tour Guides – where such legislation exists ▪ Applicable in their host country ▪ Applicable in different countries they visit/lead tours/excursions to ▪ Applicable to all activities undertaken on the tour/excursion.

Slide

Identify potential risks for the tour

Important to note:

◉ Employers may have vicarious liability for their employees

◉ Employees do not have a legal defence if they commit an offence because their employer told them to break or ignore a law

Slide 45

Slide No	Trainer Notes
45.	Trainer mentions it is worth noting: • Employers may be vicariously liable for the actions of their staff • Employees **do not have a legal defence** if they commit an offence because their employer told them to break or ignore a law.

Slide

Identify potential risks for the tour

As a result of risk management activities there may be a need to:

- ◉ Create written risk management plans
- ◉ Ensure vehicles are safe and registered
- ◉ Make sure drivers are properly licensed to drive required vehicles (as applicable for all countries to be toured)

(Continued)

Slide 46

Slide No	Trainer Notes
46.	Trainer indicates as a result of risk management activities there can/may be a need to: • Produce written risk management plans – which: ▪ Can be used to prove Duty of Care protocols were implemented in terms of discharging responsible action for managing risk ▪ Are used as the basis for determining whether or not identified risk will be accepted and how it will be managed ▪ Will be used as the foundation for training staff in practices required to effectively manage identified risk ▪ Determine the resources to be used to address identified risk ▪ May be taken on-tour by the Tour Guide for reference purposes, if required • Ensure vehicles used are safe and comply with relevant in-country requirements in terms of: ▪ Roadworthiness ▪ Registration ▪ Insurance • Provide regular service and maintenance to vehicles – to optimise their serviceability and reduce the potential for breakdown or accident • Make sure drivers of vehicles: ▪ Are licensed to drive the type of vehicle they are driving – special requirements may apply to certain types of vehicles and/or vehicles over set weights or lengths (or other dimensions) ▪ Hold a valid and current licence of the type/s required in all countries to be visited.

	Classroom Activity – Handouts
	Trainer distributes and discusses examples of risk management plans.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Slide

Identify potential risks for the tour

- Provide necessary PPE
- Produce and provide safety information
- Develop Emergency Management Plans for identified potential situations

(Continued)

Slide 47

Slide No	Trainer Notes

47.	Trainer continues identifying possible outcomes of risk management activities:
	
	• Provide all necessary PPE for all tour group members (and staff) – in order to:
	  ▪ Enable them to participate in scheduled activities, sports, events, games and other inclusions
	    – For example when conducting white water rafting or kayaking there would be a need to provide high-visibility life jackets/PFD, safety/white water helmets, knee and elbow pads, whistles, rescue ropes, rescue rope throw bags, neoprene booties, white water knives, padded gloves
	  ▪ Protect them from naturally occurring harm (including sunburn) when on-tour
	
	• Produce and provide relevant safety information and advice (including demonstrations of requirements, and [where appropriate] practice/drill prior to engagement with activities etc.) to tour group members – it can never be assumed:
	  ▪ Customers will know even the most obvious risks
	  ▪ Tour group members will know what to do to cope with those dangers, avoid damage or injury or otherwise protect themselves or their property
	
	• Develop, possess and know the contents of a range of Emergency Management Plans – to cope with possible emergencies which can be reasonably foreseen for the tour type which is about to occur
	  ▪ The tour operator is also responsible for ensuring these EMPs have been shared with tour staff and they have had opportunity to practice/drill in their requirements
	  ▪ All necessary supporting resources to enable the EMP to be implemented, as written, must also be provided.

Slide

Identify potential risks for the tour

- ◉ Check health, capacity and ability of tour group members to undertake tour/activities
- ◉ Determine safe and appropriate tour routes
- ◉ Check climate/weather on and adjacent to tour routes and destinations
- ◉ Determine appropriate and safe activities and inclusions for individual tours

Slide 48

Slide No	Trainer Notes

48.	Trainer continues identifying possible outcomes of risk management activities:
	
	• Check the personal health and capacity of tour group members – to ensure they are fit and able to safely participate in the tour and tour activities
	   ▪ Many/most Tour Operators have standards that customers must meet/comply with in this regard especially where tours/excursions involve walking, sport and/or participation in certain active pursuits (such as rafting, climbing, motor bike riding)
	• Determine tour routes – including assessing:
	   ▪ Terrains and class/es and type of roads
	   ▪ Borders and crossing
	   ▪ Rivers and crossings
	   ▪ Alternate routes
	• Check climate/weather – in terms of:
	   ▪ Recent weather events – to identify the impact, say, rain/floods in the tour area will have on travel and activities
	     – For example, heavy rain in one region may result in flooding in an adjacent area
	   ▪ Forecasts – to help work out issues such as the vehicle to use and the resources to take to make tour group members safe and comfortable
	• Determine on-tour activities to be undertaken – so:
	   ▪ Required resources can be identified
	   ▪ Checks can be made to ensure protocols have been developed to enable the safe implementation of same

	- Tour Guide/Tour Leader is familiar with the activities and can demonstrate/participate as required - Timing of same can be verified as integrating properly with planned itinerary/available time.

Slide

Slide 49

Slide No	Trainer Notes

49.	Trainer states:
	
	• All one-off tours or excursions (the Custom or Private tours) will have individual need regarding resources
	
	• One-off tours/ excursions are designed specifically for one client/group in response to needs, wants and preferences they have identified. They may have, for example:
	  ▪ Stated the destinations they want to visit
	  ▪ Indicated the mode of transport they want to use
	  ▪ Dictated timing and duration
	  ▪ Stipulated the activities they want to engage in
	  ▪ Identified the accommodation, catering and other tour-related services, products and inclusions which will/may comprise the total package
	
	• These tours/ excursions are always subject to a contract which spells out the particular requirements for the event
	  ▪ This contract – coupled with discussions with the client and Tour Operator management – MUST form the basis of determining specific resources required for the tour/ excursion
	  ▪ If the resources required are not identified *specifically* in the contract, they will be able to be identified by reading the contract to ascertain requirements based on the destinations, inclusions and activities contained in that document.

Slide

Identify and obtain specific resources for individual tours

Resources for regular/scheduled tours:

⊙ Will be identified on Loading sheets for each type of tour

⊙ Variations may be required to accommodate:

- • Different weather conditions
- • Different times of the day
- • Special needs
- • Changes in routes and inclusions

Slide 50

Slide No	Trainer Notes
50.	Trainer states regular or scheduled tours/excursions are conducted frequently – they may be conducted daily, weekly or several times per day.
	• Loading sheets will normally be prepared to identify the resources required for these tours
	• They may, however, have *individual* needs which differ between each tour/excursion
	• These differences/individual needs can be based on:
	• Weather conditions – for example:
	▪ Rain may require provision of umbrellas and wet weather gear
	▪ Prolonged bad weather may mean a 4WD vehicle is used rather than the normal/standard two-wheel drive vehicle
	▪ Severe cold conditions may require supply of thermal clothing
	▪ Sunny conditions may mean a need for sunscreen, sun glasses, umbrellas
	• Time of day:
	▪ For 'after dark' tours there can be a need to provide hand-held torches for staff and tour groups members or cap/helmet lights
	▪ Tours occurring mid-morning and/or mid-afternoon can necessitate provision of catering (facilities and food) to allow the preparation and service of a morning/afternoon tea
	▪ Tours/excursions occurring over a recognised meal period will/may likewise necessitate supply of catering for a breakfast, lunch or dinner unless alternate/outside catering arrangements have been made

	- Special needs tour group members – some tour vehicles carry standard special needs equipment (fold-up wheel chairs, ramps) but other items will need to be provided on the basis of pre-notification of needs for certain individuals or tour groups. Resources in this instance may be: - Staff (human resources) with experience with certain disabilities and with certain skills such as signing (for the hearing impaired) - Specified provisions to support those who are carers – many/most supply their own needs but on occasion (especially with overseas visitors) there can be a need to supply items/equipment and products 'as advised' - Handouts (information, advice, maps, instructions etc.) in: - Large print – for vision impaired - Different languages – to meet the needs of different language speakers - Changes to routes and inclusions – there are lots of reasons why routes and inclusions for a regular tour need to change - It is important when these changes are imposed on the itinerary attention is paid to working out whether or not the variations necessitate more or different resources than usually provided for the normal/regular tour. For example: - A different road route may require a different vehicle - A different walking route may impose demands on footwear or walking sticks plus water – or impose health-related restrictions on those who can participate - A change to activities can mean a need for new information/advice sheets plus the need to provide different PPE.

Slide

Identify and obtain specific resources for individual tours

Financial resources – will impact tours in terms of:

- Budget
- Hours allocated for staff
- Cash provided
- Credit limits on tour credit cards
- Need for management authority to make purchases above a given limit

Slide 51

Slide No	Trainer Notes

51.	Trainer gives detail of resources stating the following gives a general overview of items which need to be considered:
	
	Financial resources
	
	• The financial resources for a tour relate to:
	   ▪ The money the Tour Operator will generate from ticket sales for a tour
	   ▪ The amount of expenses involved in conducting the tour
	   ▪ The need for the tour and the business to remain viable and show an acceptable return on investment
	
	• In practical terms the impact of financial resources will be seen in terms of:
	   ▪ Budget for the tour
	   ▪ Hours allocated to staff to conduct the tour and ancillary activities
	   ▪ Cash provided for use on-tour
	   ▪ Credit limits imposed on cards/purchases made while on-tour
	   ▪ Need for tour coordinators/Tour Guides obtain management permission before making certain purchases.

Slide

Identify and obtain specific resources for individual tours

Physical resources – may involve:
- Vehicles and vessels
- Camping gear
- Catering equipment
- Food and beverages
- Safety equipment

(Continued)

Slide 52

Slide No	Trainer Notes
52.	Trainer continues discussing resources: **Physical resources** • This relates to identifying/naming types and forms of physical resources required, including: ▪ Vehicles and vessels – which might include aircraft and other types of transport, including live transport (such as horse or camels), bikes and motorbikes ▪ Camping equipment and requisites – for over-night tours ▪ Catering equipment – covering cooking equipment, holding units (for hot and cold and frozen food) and food service units and utensils ▪ Food, beverages and refreshments ▪ Safety equipment – including PPE, first aid kits, rescue and recovery gear and communication equipment ▪ Recreational and activity equipment – sports equipment, play gear.

Slide

Identify and obtain specific resources for individual tours

- ⊙ Maintenance equipment
- ⊙ Educational equipment
- ⊙ Vouchers and coupons

Slide 53

Slide No	Trainer Notes
53.	Trainer continues discussing physical resources:
	• Maintenance equipment – tool kits, spare parts, service manuals, oils and filters
	• Educational equipment – handouts, props and materials, consumables
	• Vouchers – these are the coupons given to tour group members enabling them to obtain certain products/services as appropriate to each individual voucher. For example a voucher may entitle the holder to:
	▪ Entry to an attraction
	▪ Accommodation
	▪ Meals, food, drink, refreshments
	▪ Rides and games
	▪ Merchandise
	▪ Photographs.
	Classroom Activity – Handouts
	Trainer distributes and discusses a range of tour vouchers/coupons.

Slide

Identify and obtain specific resources for individual tours

In relation to physical resources it is important to list/note:

- Their type
- Numbers/quantities
- Monetary value
- Location

Slide 54

Slide No	Trainer Notes
54.	Trainer continues discussing physical resources: • It is important to list physical resources by: ▪ Type ▪ Number, volumes, amounts/quantity required ▪ Monetary values • Note should also be made of their physical location.

Slide

Identify and obtain specific resources for individual tours

Identifying human resources for tours means:

- ⊙ Naming staff (by their individual names)
- ⊙ Determining roles and responsibilities for each
- ⊙ Ensuring rostering aligns with organisational imperatives

Slide 55

Slide No	Trainer Notes
55.	Trainer continues discussing resources:
	Human resources
	• As mentioned in the previous section not all staff are equal in terms of their experience and expertise so this will impact on their classification in terms of availability/suitability for certain tours. The process of identifying staff in reality means:
	▪ Naming staff to be used for each tour
	▪ Determining roles and responsibilities for each identified staff members – based on the experience, qualifications, training and integration of skill sets for each employee to ensure all requirements are covered off
	▪ Making sure hours worked by staff allocated:
	– Reflect rostered hours
	– Are sufficient to enable delivery of required services and required service levels/standards
	– Are in accordance with employment instruments under which employee's work – in order to eliminate/minimise the need to pay excess labour payments.

Slide

Identify and obtain specific resources for individual tours

Human resources may include:
- ⊙ Drivers
- ⊙ Tour Guides and Tour Leaders
- ⊙ Driver guides
- ⊙ Hosts/hostesses
- ⊙ Activity leaders
- ⊙ Cooks
- ⊙ Interpreters
- ⊙ Assistants

Slide 56

Slide No	Trainer Notes
56.	Trainer continues discussing human resources identifying they may include: • Drivers • Tourist guides • Tour Leaders • Driver guides • Hosts and hostesses • Activity leaders • Campsite cooks • Interpreters • Camp and tour assistants.

Slide

Identify and obtain specific resources for individual tours

Identification of human resources needs to be described by:
- Classification of each worker
- Number of each classification of staff
- Hours to be worked
- Projected labour cost

Slide 57

Slide No	Trainer Notes
57.	Trainer continues discussing human resources stressing they must be described by: • Classification • Number • Hours • Projected wages/labour cost.

Slide

Develop plans for the tour

Plans are prepared to:
- Ensure tours/excursions operate smoothly
- Control costs, timing and activities that are part of the tour
- Optimise potential of tours to meet customer expectations
- Comply with legislation and legal obligations
- Give direction to Tour staff when things go wrong
- Assist with tour management, organisation, coordination, planning and integration of tours/excursions with other organisational activities

Slide 58

Slide No	Trainer Notes
58.	Trainer explains tour/excursions plans are prepared to: • Ensure tours/excursions operate smoothly • Control costs, timing and activities that are part of the tour • Optimise potential of tours/excursions to meet customer expectations • Comply with legislation and legal obligations • Give direction to Tour staff when things go wrong or do not go as planned/expected • Assist with tour management, organisation, coordination, planning and integration of tours/excursions with other organisational activities.

Slide	

Develop plans for the tour

Commonly three types of plans are prepared:
- Operating/operational plans
- Contingency plans
- Emergency/Emergency management plans

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Slide 59

Slide No	Trainer Notes
59.	Trainer identifies it is SOP for the following plans to be developed for tours/excursions: • Operating (or 'operational') plans • Contingency plans • Emergency plans.

Slide

Develop plans for the tour

Plans for scheduled tours:
- Are prepared for every type of tour
- Are available from management
- Must be used or available for use on every tour
- Will be reviewed and revised on a regular basis
- Will be updated as emerging issues and experience dictate

Slide 60

Slide No	Trainer Notes
60.	Trainer explains context for regular/scheduled tours noting: • Scheduled tours will have standard operational, contingency and emergency plans developed for them which are used every time a regular tour is undertaken • They are planned and prepared in advance based on predicted needs and known factors, and then reviewed and revised on an on-going basis to respond to emerging issues and matters identified as being relevant.

Slide

Develop plans for the tour

Plans for custom/private tours:
- ⊙ Are created only when needed
- ⊙ Are prepared on a tour-by-tour basis
- ⊙ Must accommodate and address all relevant details for every inclusion and element of every tour
- ⊙ May be based on previous/existing plans

Slide 61

Slide No	Trainer Notes
61.	Trainer explains context for custom/private tours noting:
	• For one-off tours/excursions operational, contingency and emergency plans are created based simply on the identified needs of the tour combined with known details of the tour group, required inclusions, routes, timing and other pertinent considerations
	• In practice, these plans are:
	▪ Prepared on a tour-by-tour basis
	▪ Based on existing/similar plans as they exist for regular/scheduled tours.

Slide

Develop plans for the tour

For plans to be effective:
- ◉ They need to be resourced
- ◉ They need to trialled
- ◉ Trials need to be reviewed and plans revised
- ◉ They need to be communicated
- ◉ Demonstrations, practice and/or drills must underpin actual implementation
- ◉ They need to be reviewed/updated as tours and issues alter

Slide 62

Slide No	Trainer Notes
62.	Trainer highlights for plans to be effective several pre-requisites exist: • They need to be properly and adequately resourced • They need to trialled and tested • The trials/tests needs to be reviewed and the plans revised, as/if necessary • They need to be communicated to staff • Demonstrations, practice and/or drills must underpin actual implementation • They need to be reviewed and updated as tours and requirements/relevant issues alter.

Slide

Develop plans for the tour

Provision of plans to tour staff:

⊙ Plans may be provided by the Tour Operator in an 'Operations Package/Folder

  • or

⊙ Plans may be available via electronic devices

Slide 63

Slide No	Trainer Notes
63.	Trainer indicates all plans are prepared in advance/before the tour/excursion departs and provided for tour staff in an Operations Package/Folder that contains copies of all relevant plans for individual tours/excursions.
	All plans are usually also available in soft copy form via various electronic options such as iPhones, pads or tablets.
	Classroom Activity – Handout
	Trainer distributes and discusses sample Operations Package/Folder.

Slide

Develop plans for the tour

Operating plans may contain:
- ◉ Customer itinerary
- ◉ Operating itinerary

(Continued)

Slide 64

Slide No	Trainer Notes
64.	Trainer discusses

Standard operating plans

Standard operating plans will contain information such as/relating to:

- Customer itinerary for the tour/excursion – this will provide the basis for planning and practical implementation
  - This is the itinerary advertised by the Tour Operator and provided to tour group members when they purchase a ticket
  - This is **vital because it clearly shows exactly what the tour group members are expecting** from the tour/excursion

- Operational itinerary – this **reflects the Customer itinerary adding detail the Tour Guide/Leader will need** in order to deliver the tour 'as planned'. This itinerary will therefore include details relating to a host of practical/operational issues as appropriate to the individual nature of the tour/excursion such as:
  - Name and contact details of caterers where food and beverages will be supplied
  - Where to park the coach
  - Details of negotiated arrangements for contracted goods and services (such as accommodation, activities, fuel, third party supply/provision)
  - Highlighting:
    - Areas where customers are not allowed to go
    - Customs/local traditions to be observed

	▪ Notification in relation to:
	– When to provide certain advice, alerts and/or information to tour group members
	– Details of information/advice to be given
	– PPE which may need to be distributed
	– Demonstration of skills – in preparation for sport, and other practical activities.
	Classroom Activity – Handouts
	Trainer distributes, contrasts and differentiates between Customer itinerary and Operational itinerary.

Slide

Develop plans for the tour

- Identification of vehicles/modes of transport to be used
- Details of starting point/muster point and overview of requirements relating to start-of-tour briefing
- Information to be provided to tour group members at tour start and along the way
- Merchandise to be handed out to tour group members

(Continued)

Slide 65

Slide No	Trainer Notes
65.	Trainer continues discussing contents of standard operating plans: • Identification of vehicles/modes of transport to be used – by type, number, registration, name • Details of starting point/muster point – and overview of requirements relating to start-of-tour briefing: this may even include Ice-Breaker activities • Information to be provided to tour group members at tour start and along the way at different points/locations while on-tour • Merchandise to be handed out to tour group members – including indication of when this could/should occur. **Classroom Activity – Handout** Trainer distributes and discusses sample Standard Operating Plans.

Slide

Develop plans for the tour

- Details of coupons and vouchers to be carried
- Scripted commentary
- Loading Sheets
- Financial details for the tour

Slide 66

Slide No	Trainer Notes
66.	Trainer continues discussing contents of standard operating plans:
	• Details of coupons and vouchers to be carried – and indication of what they are for and when and where they are to be/can be used
	• Scripted commentary – where applicable
	• Loading Sheets – which identify the physical resources to be loaded for the tour/excursion
	• Financial details for the tour – in terms of cash to be taken, credit cards or other purchasing protocols necessary to effectively conduct the tour.

Slide

Develop plans for the tour

Contingency plans:
- ◉ Are Plan B
- ◉ They detail what to do if normal events/activities cannot be implemented or followed
- ◉ They deal with issues that are not emergencies but have the potential to disrupt the tour

Slide 67

Slide No	Trainer Notes
67.	Trainer discusses **Contingency plans** Contingency plans are: • Plans prepared for tour staff to follow in case certain predictable, foreseeable or likely events actually materialise • They are Plan B – they detail what will be done when Plan A (what should *normally* occur as planned/as usual) cannot happen/take place • These events are not 'emergencies' (that is, they do not put life or property in danger) but they have the potential to cause disruption to the tour/excursion. **Classroom Activity – Handout** Trainer distributes and discusses sample Contingency Plans.

Slide

Develop plans for the tour

Contingency plans may be prepared to respond to:

◉ Bad weather preventing normal activities

◉ Unexpected closure of an attraction

◉ Unavailability of reserved accommodation

◉ Road closure

◉ Revocation of permits/authorities which have been granted

◉ Delays caused by tour group members

Slide 68

Slide No	Trainer Notes
68.	Trainer continues discussing contingency plans identifying events which may trigger the need to activate a contingency plan include: • Bad weather preventing implementation of a planned activity • Unexpected closure of an advertised attraction • Unavailability of a reserved accommodation venue • Road closure preventing or delaying access to a destination • Permits and permissions which were granted have been revoked • Delays in terms of tour group members returning to a muster point and/or re-boarding the tour vehicle.

Slide

Develop plans for the tour

Emergency plans (Emergency Management plans):

- Are prepared as a result of risk management activities
- Identify nominated emergencies
- Are prepared for identified types of emergencies
- Allocate roles and responsibilities to individual staff

(Continued)

Slide 69

Slide No	Trainer Notes

69.	Trainer discusses
	Emergency plans
	• Emergency plans are prepared as a result of formal risk management processes
	• These plans:
	  ▪ Describe emergency situations which have been identified as having the potential to impact the tour/excursions – such as vehicle accident, missing person (from the tour party, medical emergency)
	  ▪ Are prepared on an issue-by-issue basis – every identified emergency has its own plan developed for it
	  ▪ Allocate roles and responsibilities to individual Tour staff.
	Classroom Activity – Handout
	Trainer distributes and discusses sample Emergency/Emergency Management Plans.

Slide

Develop plans for the tour

- Identify on-board resources available to help deal with emergencies
- Set out action to be taken:
  - In priority/sequential order
  - On a step-by-step basis
  - Providing support information/details
  - Including communication requirements/protocols

Slide 70

Slide No	Trainer Notes

70.	Trainer continues discussion content of Emergency plans:
	
	• Indicate on-board resources which are available to (potentially) assist with the emergency
	
	• Set out the action to be taken for each identified situation:
	
	    ▪ In sequential/priority order
	    ▪ On a clear, step-by-step basis
	    ▪ Providing supporting information to assist with emergency management – such as:
	        – Names of local contacts
	        – Contact details for (for example) hospitals, police, doctors
	    ▪ Including communication required with the Tour operator and how such contact must occur and the detail of the information to be notified.

Slide

Slide No	Trainer Notes
71.	Trainer introduces 'stowing' explaining 'Stowing' is another word/term for loading – both words/terms refer to the physical loading of equipment and supplies into or onto each vehicle or method of transport to be used for tours/excursions.

Slide

Stow equipment and supplies for the tour

Important considerations when stowing include:

⊙ Using Loading Sheets as the basis for loading items/resources

⊙ Complying with required manual handling procedures

⊙ Complying with weight restrictions – for vehicles and animals

(Continued)

Slide 72

Slide No	Trainer Notes

72.	Trainer identifies considerations when stowing equipment and supplies for a day tour/short excursion include:
	
	• Prepared Loading Sheets **must** form the basis for actual loading – the planning and calculations which went into their development/creation must give the central direction for:
	  ▪ **Which vehicle** items are loaded onto
	  ▪ **Where** in each vehicle the items are located
	    – Any changes made must be reflected on the Loading Sheet – that is, the Loading Sheet **MUST be amended to show *actual* loading**
	• Complying with approved manual handling techniques – in terms of:
	  ▪ Safe lifting and carrying
	  ▪ Use of team lifts and/or mechanical devices to help move/carry items
	• Complying with weight restrictions – in terms of:
	  ▪ Weight limits for animals as advised by Codes of Practice or reference authorities
	  ▪ Legislated and/or manufacturer specifications for vehicles.

Slide

Stow equipment and supplies for the tour

- Taking into account tour-specific requirements
- Loading items so they are readily accessible when required
- Following protocols for safe stowing of hazardous items
- Securing items

Slide 73

Slide No	Trainer Notes
73.	Trainer continues discussing considerations when stowing equipment and supplies: • Taking into account tour-specific requirements – these commonly refer to: ▪ Terrain to be covered which can impact/influence capacity of the vehicle (or animal) to handle the load; The potential for items to shift during transit ▪ The itinerary – which will indicate when certain items will need to be accessed and the sequence in which some items will need to be accessed ▪ Special needs and/or special requests which apply to the tour group ▪ Items available from other providers (attractions, venues, destinations) during the trip/tour • Enabling ready access to certain equipment and items – for example: ▪ Items that will be required first are often loaded last; Items needed for emergencies are always stowed in a discreet and dedicated area enabling easy access in the event of an emergency • Following legislated and/or host enterprise procedures for stowing of hazardous items: ▪ Sharp tools or equipment; Heavy items; Items made of or containing glass; Gas containers; Heat-sensitive aerosols; Medication; Petrol, fuel and other flammable materials • Securing equipment and supplies – in order to: ▪ Prevent movement, as far as practicable ▪ Stop unauthorised access including theft by others and unauthorised use by tour group members.

	Classroom Activity – Excursion
	Trainer organises excursion to suitable Tour Operator so students can:
	• Speak to staff and management
	• Watch the planning and preparation processes
	• Inspect the workplace and its facilities
	• View and/or obtain sample plans, itineraries and other relevant documentation
	• Observe loading of vehicles.

Slide

Stow equipment and supplies for the tour

'Loading sheets' are the checklists used to ensure equipment and supplies are loaded – checking involves:

- Meeting with tour staff to conduct the check
- Photocopying completed Loading sheets and giving copy to tour staff
- Handling last-minute requirements

(Continued)

Slide 74

Slide No	Trainer Notes
74.	Trainer notes that commonly the Loading sheets are the checklists used to confirm all equipment and supplies have been loaded for trips and tours and the checking process comprises the following: • Meeting with tour staff to conduct the check – points to note are: ▪ This meeting/activity has to be organised – it needs to be scheduled and not just left to chance, or overlooked ▪ Sufficient time must be allocated – it is a time-consuming process ▪ Not all tour staff need to be present at this meeting but there must be at least one tour staff member in attendance to see where things are, to be informed of necessary information and to make input • Photocopying loading sheets completed as part of the loading process – so the tour staff member has their own copy • Handling any last-minute requirements – and ensuring these are authorised and documented as appropriate.

Slide

Stow equipment and supplies for the tour

- Verifying/inspecting items
- Adjusting Loading sheets as/if required – to reflect changes
- Signing-off and dating the sheets

Slide 75

Slide No	Trainer Notes
75.	Trainer continues describing use of Loading sheets as checklists:
	• Verifying/inspecting items as necessary/appropriate to the nature of each item – for example:
	▪ Gas cylinders are within their legislated testing dates required for pressure vessels
	▪ EPIRBs are registered correctly and are still in date
	▪ Vehicle registration is current
	▪ Foods are within required Use By dates
	▪ There is no obvious/unacceptable damage or defects to goods
	• Adjusting the loading sheets – as/if required in accordance with actual loading and/or decisions made. This involves:
	▪ Amending/entering figures in the Number Loaded column
	▪ Adding written comment in the Comments column
	• Signing-off and dating the loading sheets – the loading sheet needs to be signed:
	▪ By the person/s who loaded the vehicle
	▪ By the tour staff member who participated in the checking process – their signature indicates:
	– All items were provided as indicated in good condition
	– They are taking responsibility for the items listed.

Slide

Stow equipment and supplies for the tour

In some cases:

- Loading/stowing occurs at the same time 'checks' are made
- Tour staff may assist in the loading process
- Tour staff may determine where and how items are stowed

Slide 76

Slide No	Trainer Notes
76.	Trainer notes: • In some cases loading and stowing of the equipment and supplies takes place **at the same time** as the checks are made to ensure all items have been packed ▪ In these cases: – Tour staff help load and stow the items – Tour staff decide where they want supplies and equipment to be located – Loading sheets are signed-off when the process of packing/loading has been completed.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Slide

Stow equipment and supplies for the tour

Final checks:
- Precede tour departure by 'some time'
- Tour complexity and duration are prime determinants of how far in advance the checks are made
- Aim to give a realistic opportunity to make necessary alterations/undertake required repairs
- Regular/short trips tend to have checks done 'on the day'

Slide 77

Slide No	Trainer Notes

77.	Trainer states the final check usually precedes trip/tour departure by 'some time' explaining:
	
	• Exactly what is 'some time' varies between trips
	
	• Trips/tours which are longer duration, custom or private and involving greater numbers, more complexity and higher vehicle numbers are traditionally conducted 'earlier' – such as a day or more in advance
	
	• Final checks for these trips/tours take place at this time to give a realistic time frame to make any adjustments (re-packing/re-loading) or repairs which may be needed
	
	• Regular, shorter trips/tours tend to have final checks undertaken 'on the day' or within 24 hours of departure
	
	• A shorter lead time for these checks is used because:
	  ▪ The vehicles usually need to be kept in service/available for use
	  ▪ Issues arising are usually less problematic and more readily addressed
	  ▪ There is less equipment to be checked – or re-loaded to another vehicle if necessary.

Slide

Stow equipment and supplies for the tour

Practices in making final checks:
- Providing tour staff with their own copy of Loading sheets
- Doing a walk around of vehicle
- Opening compartments in vehicles
- Advising of any special storage techniques or locations used
- Demonstrating stowing techniques as/if required

(Continued)

Slide 78

Slide No	Trainer Notes

78.	Trainer presents practices used to complete final checking can include:
	• Providing all tour staff with their own copy of the loading sheets – for their personal reference
	• Familiarising tour staff with location of equipment and supplies within individual vehicles – by:
	  ▪ Conducting a 'walk-around' of the vehicle
	  ▪ Opening compartments and physically showing/indicating where individual items have been stowed (with reference to their location on the loading sheets)
	• Notifying staff in relation to special precautions that have been taken – which may include:
	  ▪ Advising of storage of traditional items which have been stowed in other than usual locations
	  ▪ Explaining use of (and reasons) special packaging and storing materials and/or techniques which may have been applied
	  ▪ Demonstrating packaging and storing techniques so staff can duplicate them *en route.*

Slide

Stow equipment and supplies for the tour

- Doing a vehicle 'shake down' run
- Visually inspecting load and vehicle for signs of trouble
- Double-checking Loading sheets ... again!
- Verifying comfort and safety of tour group passengers in vehicles where supplies have been stowed

Slide 79

Slide No	Trainer Notes
79.	Trainer continues presenting practices used to complete final checking:
	• Taking vehicle for a shake-down run – this is often done to:
	▪ Settle items in position – so:
	– They do not rattle when customers first board
	– They can be further secured prior to tour departure
	▪ Verify:
	– Impact of load (in terms of weight and balance) on behaviour, handling and performance
	– Overall vehicle operational status
	▪ Trigger indications there are problems – with load or vehicle: see immediately below
	• Visually inspecting the load and the vehicles for problem signs – such as:
	▪ Leakages from supplies as a result of the shake-down run, or due to faulty containers or packaging
	▪ Leakages from the vehicle – such as water, fuel, other fluids
	▪ Protrusions outside the acceptable dimensions of the vehicle
	• Double-checking Loading sheets have been completed as required – and all required equipment and supplies have been loaded
	• Ensuring comfort and safety for those who may be travelling in vehicles that have been packed with equipment and supplies.

Slide

Stow equipment and supplies for the tour

The final check:

- May involve a member/representative of private tour group
- May feature loading of foodstuffs – these are commonly among the last items loaded

Slide 80

Slide No	Trainer Notes
80.	Trainer notes in some cases, the final check:
	• May include a representative of a private tour party – where this has been requested or negotiated
	• May feature loading of certain foodstuffs – such as:
	▪ Pre-prepared hot food and/or beverages (including hot water for tea and coffees) – which is to be maintained 'hot' so it can be served hot
	Refrigerated and frozen foods – which have been held in commercial fridges and freezers and will be loaded into portable refrigeration and/or freezer units

Slide

Summary – Element 1

When preparing for the tour:
- ⦿ Identify type, nature and duration of tour to be conducted
- ⦿ Identify the itinerary for the tour
- ⦿ Try to determine profile and needs of tour group
- ⦿ Obtain and interpret briefing information from the Tour Operator

(Continued)

Slide 81

Slide No	Trainer Notes
81.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Summary – Element 1

- Clarify specific tour-repeated requirements and issues
- Use the briefing information to make decisions about the tour in the planning phase
- Determine and acquire resources required for the tour

(Continued)

Slide 82

Slide No	Trainer Notes
82.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Summary – Element 1

- Prepare or secure operational, contingency and emergency plans
- Develop one-off plans/itineraries for custom/private tours
- Attempt to accommodate known special requests and needs to the best extent possible within operational parameters
- Liaise with colleagues as part of the planning and preparation process

(Continued)

Slide 83

Slide No	Trainer Notes
83.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Summary – Element 1

- Employ standard risk management protocols to identify, assess and control/manage risks
- Be aware of the potential for legal action if damage/harm occurs or contracted obligations are not met
- Load and check resources for the tour

Slide 84

Slide No	Trainer Notes
84.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

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

Slide

Slide No	Trainer Notes
86.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide.
	Class Activity – General Discussion
	Trainer leads a general class discussion by asking questions such as:
	• What is involved in conducting a tour?
	• What is a pre-tour briefing and what does it cover/contain?
	• What might the Tour Guide need to do on tour to optimise the customer experience?
	• What experience do you have with conducting tours and/or being a tour group member on a tour?

Slide

Brief customers about tour

The briefing may:
- Need to be developed by the Tour Guide
- Be provided as a standard 'tour brief'
- Be delivered in a room or 'muster point'
- Be delivered on the tour coach/vehicle

Slide 87

Slide No	Trainer Notes
87.	Trainer discusses context of and location for the briefing observing it may: • Need to be developed by the Tour Guide • Be provided as a standard 'Tour Brief' by the Tour Operator • Be delivered in a room, designated location or the muster point for the tour • Be delivered on the bus/coach as it departs the Tour Operator office on the way to the first destination.

Slide

Brief customers about tour

Two keys to conducting effective briefings are:
- Providing a suitable welcome
- Covering required/identifies topics and issues

Slide 88

Slide No	Trainer Notes
88.	Trainer identifies two keys to briefing customers before/at a the start of a tour: • Providing a suitable welcome • Covering required issues/topics.

Slide

Slide 89

Slide No	Trainer Notes
89.	Trainer looks at issues involved in providing a suitable welcome:

- Be prepared – this means:
    - All organisation and arrangements for the tour must have been totally completed *before* people arrive
    - All materials ready for use/distribution need to be obtained, assembled and ready to hand out
    - All relevant details about the group should have been obtained and studied (where/if applicable – and this is **not applicable/available** for all day tours/excursions) so the tour group profile, needs, arrangements are known and understood and have been catered for to the best extent possible
- Be there early – it is essential the Tour Guide/Tour Leader is there (at the briefing location) before the advertised/promised starting time:
    - This means being at the pre-determined point 10 – 15 minutes early
    - This lets participants know they were expected and preparations for their arrival/attendance have been taken
    - This inspires confidence in the Guide/Leader and enhances credibility right from the word 'Go'
- Verbally welcome them:
    - Try to do this individually – to each participant of the group – as opposed to a generic welcome to the entire group
    - Use their names – many members of a group will be wearing name tags so use these to personalise the welcome
    - Smile – a smile is a universal way of demonstrating pleasure in meeting/seeing someone:

	– Give a genuine smile; Make sure the verbal greeting matches the smiling body language/facial expression
	
	    – Give everyone a smile – never reserve smiles for people you know, people from a certain country, people of a certain age or those of a certain gender
	
	• If there is a 'group leader', thank the group leader – it is standard practice to:
	
	   ▪ Seek them out when the group arrives (they will usually try to seek out the Tour Guide)
	
	   ▪ Briefly thank them for bringing the group – sincerely
	
	   ▪ Mention the work of the group leader in front of the group – in recognition of their efforts in arranging the tour
	
	   ▪ Give the group leader a gift from the Tour Operator, if applicable according to SOPs of the organisation
	
	• Make necessary introductions – this may include:
	
	   ▪ Introducing group leader to management; Introducing self to participants; Introducing group members to each other where they are not part of a pre-existing group who already know each other.
	
	Common practice in these situations is not to shake hands – but be prepared for situations where participants offer their hand, and if they do, shake it.

Slide

Brief customers about tour

Topics to address at briefings:
- ⊙ Welcoming and thanking customers
- ⊙ Stating name of tour
- ⊙ Introducing tour staff
- ⊙ Confirming itinerary

(Continued)

Slide 90

Slide No	Trainer Notes
90.	Trainer gives examples of topics to address/cover as part of briefing: • Welcoming the tour group members and: ▪ Thanking them for participating, joining the tour/excursion and/or buying their tickets ▪ Confirming the tour/excursion – so customers know they are about to go on the correct tour/the excursion they wanted to participate ▪ Introducing Tour Guide and other Tour staff/crew to customers – explaining their roles and responsibilities • Presenting tour/excursion overview – including: • Confirming itinerary – which might involve distributing hard copy itineraries and advising of changes which need to be made to advertised/expected routes, activities, inclusions ▪ Giving destination information – explaining and describing what customers might expect ▪ Confirming timing details – such as travel times, time allowed at each destination/for each activity, time for meals and refreshments, departure time from accommodation venue (where applicable) and the time the tour/excursion is expected to return/arrive back at the Tour Operator's office ▪ Introducing and/or back-grounding the tour/excursion including presentation of baseline historical data, relevant details, contextual information, points of interest.

Slide

Brief customers about tour

- ◉ Distributing required items –
  name tags, vouchers,
  merchandise, PPE
- ◉ Advising and explaining "Do's
  and Don'ts"
- ◉ Notifying people what to do if
  they become lost/separated
  from the group

(Continued)

Slide 91

Slide No	Trainer Notes
91.	Trainer continues giving examples of topics to address/cover as part of briefing: • Distributing items as appropriate to the needs of the tour/excursion – this may include: 　▪ Handing out including name badges and merchandise 　▪ Presenting and explaining vouchers 　▪ Giving and explaining tour/destination handouts and brochures 　▪ Fitting people with safety equipment and/or clothing • Advising of Do's and Don'ts of the tour/excursion (so called 'tour requirements') – specifying for example: 　▪ Where people can and cannot go/enter 　▪ What they can do and cannot do 　▪ Protocols to observe when in a tour vehicle/riding an animal 　▪ Action to optimise group safety, comfort, engagement and enjoyment 　▪ Cultural and environmental issues which must be respected 　▪ Acceptable and unacceptable behaviours 　▪ Applicable Codes of Conduct to which the Tour Operator subscribes • Notifying of what to do if a person becomes separated from the group – options will depend on the organisation conducting the tour/excursion and the duration and nature of the tour, but possibilities include: 　▪ Going to a designated location 　▪ Calling a given telephone number – which may be the cell phone/hand phone of the Tour Guide or can be management or security at attractions/destinations 　▪ Staying put in the location where the person realises they have become separated from the group.

Slide

Brief customers about tour

- Presenting safety precautions
- Explaining site policies and procedures
- Encouraging group to enjoy the tour
- Inviting people to ask questions and engage with activities and all aspects of the tour

Slide 92

Slide No	Trainer Notes
92.	Trainer continues giving examples of topics to address/cover as part of briefing: • Presenting safety precautions – safety is a critical and central consideration for every tour. All participants should finish the tour in the same condition they started it. Advising tour group members about safety precautions can include: ▪ Screening a video/DVD ▪ Reading a prepared screed ▪ Distributing safety equipment and/or protective clothing ▪ Demonstrating how to use safety equipment ▪ Assisting participants with using/wearing their safety items ▪ Explaining the level and nature of physical exertion required • Explaining site policies where necessary for attractions and destinations – mention will need to be made (as appropriate to the tour/excursion type) of relevant site/organisational policies. Many operators will have these produced in hard copy form for distribution to the participants as part of the briefing process, but there may (still) be a need to: ▪ Draw people's attention to pertinent sections/parts ▪ Explain aspects of the written word ▪ Highlight sections which are particularly applicable to *this* tour/excursion • Encouraging group to enjoy the tour/excursion – and motivating them to participate and engage with all activities and inclusions • Making a specific invitation to the group to: ▪ Ask questions throughout the tour ▪ Notify Tour staff if they are feeling uncomfortable or unwell ▪ Advise Tour staff should they become injured/distressed or become aware of.

	Classroom Activity – Demonstration and Practical
	Trainer demonstrates how to conduct a tour briefing and provides opportunity for students to do the same.

Slide

Commence tour

Activities involved in commencing tours:
- Checking customers have paid
- Loading customers/passengers
- Directing customers to the first destination/activity
- Engaging with group participants
- Encouraging participation
- Generating confidence
- Building credibility

Slide 93

Slide No	Trainer Notes
93.	Trainer identifies activities involved in commencing tours include: • Checking customers have paid • Loading customers/passengers • Directing customers to the first destination/activity • Engaging with group participants • Encouraging participation • Generating confidence • Building credibility.

Slide

Slide No	Trainer Notes
94.	Trainer discusses checking customers have paid stating this:
	• May be undertaken at/as part of the briefing process – which also helps confirm people are attending the correct tour
	• May be done as customers board the tour vehicle
	• Is an essential aspect for all tours – it **must never be assumed** people have paid and are entitled to join the tour: it is essential only paying customers are allowed to participate
	• Needs to be done politely and respectfully – without implying to people they might not have paid
	• May involve sighting tickets – and cross-checking against an internal list/manifest and indicating those who have boarded and those who are 'no shows'.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates how to check people have paid and provides opportunity for students to do the same.

Slide

Slide No	Trainer Notes
95.	Trainer discusses loading customers/passengers explaining if the tour is a walking tour this requirement will obviously not apply but where it does there can be a need to: • Assist people board the coach/get into the vehicle/s • Maintain positive customer relations and rapport building • Do a head count for the tour group – to identify/confirm 'pax' • Identify seating allocation for individuals, where applicable – this will not apply to 'free seating' tours where people are free to sit where they like/anywhere in the vehicle • Help people stow their personal belongings in the vehicle • Work quickly – it is important to board people as swiftly as possible – so the tour can start 'on time' ▪ Starting on-time is vital – if the briefing starts late, this means the tour will start late and it is important all tours start on-time, so they can cover the listed activities and finish on-time ▪ Running behind time is bad for the tour group members – who may have other places to be and other things to do, based on the itinerary they were given ▪ Running behind time with *this* group can also jeopardise the on-time departure of the *next* tour ▪ Running behind time also has implications for other staff in the organisation who will assist by cleaning vehicles, re-stocking, catering and other support activities.

Slide

Slide No	Trainer Notes
96.	Trainer discusses directing customers to the first destination/activity stating an initial requirement for all tours/excursions is to:
	• Generate interest/excitement in the first destination or activity on the itinerary
	• Provide relevant information and advice in relation to the first destination or activity on the itinerary
	• Distribute necessary resources relating to the first destination or activity – this can relate to:
	▪ Information sheets
	▪ Vouchers/coupons
	▪ Safety items
	▪ Equipment and resources.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates actions identified on slide and provides opportunity for students to do the same.

Slide

Commence tour

When engaging with group there is a need to:
- Develop rapport
- Interact positively
- Acknowledge people and make them feel special
- Share experiences and emotions
- Ask questions to get people talking
- Acknowledge feelings and experiences
- Join in group conversations

Slide 97

Slide No	Trainer Notes
97.	Trainer discusses engaging with group participants stating from the start of the tour and throughout it, there is a need for the Tour Guide to:
	• Develop a rapport with the group and individuals
	• Interact positively with people
	• Make individuals feel acknowledged and important
	• Share the experience and emotions of tour group members
	• Ask questions of tour group members to get them talking
	• Acknowledge how individual feel and what their responses to tour experiences are
	• Join in group conversations and contribute to same.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates actions identified on slide and provides opportunity for students to do the same.

Slide

Slide No	Trainer Notes
98.	Trainer discusses encouraging participation stressing where appropriate the Tour Guide should encourage individuals to participate in the tour **BUT this must be done with sensitivity** because: • Some people simply do not want to participate in every activity • Some people are unable to participate in every activity.

Slide

Commence tour

Active engagement may be achieved through:
- Being enthusiastic
- Providing clear and detailed instructions
- Demonstrating what is required/how to do things
- Giving tips on performance
- Speaking from personal experience about the activity
- Asking about people's progress
- Setting achievable targets

Slide 99

Slide No	Trainer Notes
99.	Trainer continues discussing encouraging participation observing active engagement of tour group members with activities can be achieved by: • Being enthusiastic about the activity • Providing clear and detailed information and instructions • Demonstrating/showing what is required • Giving tips about how to optimise personal performance • Speaking from personal experience about the feelings and benefits flowing from participation • Asking people about their progress and experience with the activity • Setting achievable/realistic targets/challenges for individuals or groups. **Classroom Activity – Demonstration and Practical** Trainer demonstrates actions identified on slide and provides opportunity for students to do the same.

Slide

Slide No	Trainer Notes
100.	Trainer discusses generating confidence stating in some instances there can be a need for the Tour Guide to generate confidence in tour group members in relation to tour activities and this may be required in order to: • Optimise engagement with activities • Enable people to get the most from their experience • Demonstrate Tour Guide interest in individual tour group members and a willingness to help them • Reassure people about the safety of activities • Help customers believe they can do whatever is required.

Slide

Commence tour

Ways to generate confidence in tour group members:
- Talking about and giving examples of what is required
- Demonstrating what is required
- Provide 1:1 assistance
- Screening an instructions video/DVD
- Starting 'easy' and getting more difficult with time
- Acknowledging/congratulating achievement
- Encouraging people to keep trying

Slide 101

Slide No	Trainer Notes

101.	Trainer explains confidence may be generated by:
	
	• Talking about the activity and giving examples of:
	  ▪ What is required
	  ▪ What can be expected
	
	• Demonstrating what to do
	
	• Providing personal/one-on-one assistance
	
	• Screening an instructional DVD
	
	• Initiating interaction on a graduated basis – so the intensity of engagement increases as the skill/confidence of the individual grows
	
	• Congratulating individuals on achievement
	
	• Encouraging people to continue trying.
	
	Classroom Activity – Demonstration and Practical
	
	Trainer demonstrates actions identified on slide and provides opportunity for students to do the same.

Slide

Commence tour

Tour Guide credibility can be built by:
- Dressing properly
- Acting and speaking professionally
- Delivering what was promised
- Providing information and insight
- Being a role model for behaviour
- Directing/controlling people and showing them what to do/where to go

Slide 102

Slide No	Trainer Notes
102.	Trainer discusses building credibility explaining tour group members look to the Tour Guide for leadership and knowledge and credibility can be built through a combination of actions, such as:

- Dressing appropriately – neat, clean and in whatever uniform is required by the Tour Operator
  - It is important for the Tour Guide to 'look the part'
- Acting and speaking professionally – while Tour Guides need to interact with customers there is a need to maintain a 'professional distance' whereby overall demeanour is friendly and approachable but nonetheless proficient and competent
- Proving things are organised by conducting the tour as scheduled
- Providing relevant/interesting information and insight – and speaking from first-hand, personal experience/s
- Acting as a role model – about how people should act/behave, where they can go and cannot go, how to talk to others
- Directing, navigating and moving people – where they go, what they do, how long they spend in an area/on an activity
- Showing people what to do – demonstrating skills, safety equipment/requirements, local activities.

Classroom Activity – Demonstration and Practical

Trainer demonstrates actions identified on slide and provides opportunity for students to do the same.

Slide

Follow itinerary for the tour

Activities required include:
- Ensuring advertised itinerary is delivered
- Providing tour commentary
- Overseeing the tour group
- Counting participants
- Demonstrating the principles of tour guiding

Slide 103

Slide No	Trainer Notes
103.	Trainer indicates the activities to be covered in this section explaining each will be covered in more detail on following slides.

Slide

Follow itinerary for the tour

Ensuring advertised itinerary is delivered means:

- Ensuring all listed destinations are visited
- Making sure all promised attractions are covered
- Guaranteeing expected activities are conducted
- Delivering products and services as promoted
- Adhering to sequence and schedule set out

Slide 104

Slide No	Trainer Notes
104.	Trainer discusses activities involved in following tour itinerary **Ensuring advertised itinerary is delivered** This means: • Ensuring all listed destinations are visited • Making sure all promised attractions are covered • Guaranteeing expected activities are conducted (including interpretive activities) • Delivering products and services as promoted • Adhering to the order/sequence and schedule/timing set out.

Slide

Follow itinerary for the tour

Ways to deliver advertised itinerary:

- ⊙ Know the itinerary in detail – have a copy of it
- ⊙ Start on time
- ⊙ Give briefings on the vehicle
- ⊙ Distribute resources on the vehicle

(Continued)

Slide 105

Slide No	Trainer Notes
105.	Trainer presents strategies to optimise potential to ensure advertised itinerary is delivered: • Know the itinerary – this means either memorising it or having a hard copy available for constant reference ▪ The itinerary is the key to the tour so it is **absolutely critical** the Tour Guide knows exactly what is listed/has been arranged or promised to the tour group • Always start on-time – if possible (that is, if all tour group members are present) be prepared to start early • Give briefings on the vehicle – as opposed to on arrival at destinations • Distribute materials and information, vouchers, gear and others resources on the vehicle – as opposed to waiting for arrival at the location.

Slide

Slide No	Trainer Notes
106.	Trainer continues presenting strategies to optimise potential to ensure advertised itinerary is delivered:

- Keep an eye on the time – there is **an ever-present necessity** to know exactly what the time is at all times: this requirements is doubly important for day tours/short excursions given the limited capacity to be able to make up lost time
- Try to group tour participants when providing information and advice – as opposed to having to perform *multiple* one-on-one demonstrations and/or explanations
    - Many operators/Tour Guides will use some form of amplification (PA system, megaphone) to help with this
- Communicate with destinations and attractions – to let them know/remind them the tour has commenced, when it is scheduled to arrive and what is expected from them
    - This communication is also useful as it allows the destination/attraction to share details of any issue which might impact tour operations thereby giving the Tour Guide maximum time to consider effective responses to those issues.

Classroom Activity – Guest Speaker

Trainer arranges for Tour Guide to attend and talk to students about their job and their roles and responsibilities in relation to planning for and conducting short tours/excursions.

Slide

Follow itinerary for the tour

A scripted commentary:
- Is a pre-prepared talk to be delivered by the Tour Guide when on tour
- Is standard for many/most tours
- Is an informed talk about the tour providing facts, detail, history, information and points of interest relating to what is being seen, visited and experienced
- Is a guide about what to say – extra information often needs to be added to suit individual groups

Slide 107

Slide No	Trainer Notes
107.	Trainer discusses activities involved in following tour itinerary
	Providing tour commentary
	Defining 'scripted commentary'
	• Many tours/excursions feature a scripted commentary
	• A scripted commentary is a prepared talk about an identified topic/topics of interest to a group of tour group members
	• The scripted commentary may be prepared by the Tour Operator and provided for use by the Tour Guide, or there may be a need for every Tour Guide to develop their own scripted commentary for each tour/group they lead
	• A scripted commentary should be thought of as a *guide* about what needs to be said rather than a *complete list* of everything that needs to be said during a tour
	• There will always be a need to provide some *unscripted* commentary to supplement whatever scripted commentary is prepared
	• Unscripted commentary refers to the situation where information is provided to the tour throughout the tour but reference is not made to a script when doing so
	• In many cases, experienced Tour Guides will memorise the scripted commentary for regular/scheduled tours/excursions.

Slide

Follow itinerary for the tour

Advice on delivering scripted commentaries:

⊙ Ensure visibility to all tour group members

⊙ Face the group

⊙ Speak loud enough (or use technology to assist)

⊙ Be enthusiastic

⊙ Begin talking in advance of the site, attraction or stop

(Continued)

Slide 108

Slide No	Trainer Notes
108.	Trainer provides advice on delivering scripted commentaries: • Ensuring visibility to all tour group members – it is preferable if all people on the tour can also read/see the lips of the Tour Guide when they are speaking but at a minimum they should at least be able to see the person speaking to some extent • Facing the group – to the greatest extent possible • Speaking loudly enough for everyone to hear – or using technology/amplification to help project the voice • Remaining enthusiastic and appropriate for the tour content – and as appropriate to the nature/profile of the tour group members: some tours/topics require a sombre approach and others a lively and engaging demeanour • Beginning the verbal commentary sufficiently in advance of a scheduled tour stop – so participants have time to focus on whatever is the focus of the commentary ▪ Alternatively a decision may be taken to arrive at the stop/location, and then deliver all the commentary at this point: timing constraints will often dictate which option needs to be used.

Slide

Slide No	Trainer Notes

109.	Trainer continues providing advice on delivering scripted commentaries:
	
	• Focussing attention on entire group – commentary must be directed at, and embrace, all tour group members. Never fall for the common traps of:
	  ▪ Talking only to those who are closest
	  ▪ Directing commentary at those in the immediate line-of-sight
	  ▪ Commentating only to one or two 'special' group members
	  ▪ Focussing on a certain person, age group, nationality or gender
	• Communicating at level that will be understood by the audience considering their age, education, language, culture and special needs – this frequently means:
	  ▪ Keeping things simple
	  ▪ Using hand gestures to accompany verbal communication
	  ▪ Using appropriate words, terms and phrases
	  ▪ Highlighting points identified as being of interest to the group
	• Seeking feedback from the group throughout the commentary:
	  ▪ Can they hear/see?
	  ▪ Anything else they want to know?
	  ▪ Do they want a break/rest?
	• Encouraging questions – and responding to them in a way which demonstrates questions really are encouraged and appreciated.

Slide

Follow itinerary for the tour

- Make the commentary a unique event
- Know when to be quiet!
- Adjust the script as required on the basis of group needs and/or emerging events on the tour

Slide 110

Slide No	Trainer Notes
110.	Trainer continues providing advice on delivering scripted commentaries:
	▪ Making the commentary a 'unique' event – avoid allowing commentaries to:
	▪ Become boring and lifeless
	▪ Sounding rote and mechanised/robotic
	Add comments which include new information and target the interests of the group
	• Knowing when to be quiet – many people who deliver tours seem to think their job is to talk 'all the time' and this is definitely not the case/requirement. It is important to keep quiet to allow participants to:
	▪ Have a break from being talked at/to
	▪ Experience the tour in relative peace and quiet
	▪ Enjoy the experience on their own
	• Adjusting the commentary as required – to accommodate:
	▪ Identified interest of the group
	▪ Emerging events.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates how to deliver a scripted commentary and provides sample scripted commentaries for students so they can practice same.

Slide

Follow itinerary for the tour

Overseeing the tour group is necessary to:
- Help keep the tour on schedule
- Optimise the satisfaction of tour group members
- Reduce negative impacts on places/people visited
- Enhance the reputation of the Tour Operator
- Comply with obligations imposed by various Codes to which the business may subscribe

Slide 111

Slide No	Trainer Notes
111.	Trainer discusses activities involved in following tour itinerary
	Overseeing the tour group
	An on-going responsibility for the Tour Guide is to monitor, direct, control and, where necessary, modify group and/or individual behaviour. This is necessary to:
	• Help keep the tour on schedule
	• Optimise the satisfaction of tour group members
	• Reduce negative impacts on places/people visited
	• Enhance the reputation of the Tour Operator
	• Comply with obligations imposed by various Codes to which the business may subscribe.

Slide

Follow itinerary for the tour

Ways to monitor group:
- ◉ Watching/observing them
- ◉ Listening to what is being said
- ◉ Being told something by a tour group member
- ◉ Asking regular questions
- ◉ Creating a safe and supportive environment

Slide 112

Slide No	Trainer Notes
112.	Trainer explains ways to monitor/assess the tour group and their possible needs while on tour are: • Visual observation – watching the group and individuals within it to determine their needs and identify if any problems are emerging. The key is to observe and interpret their *body language* with special attention paid to facial expressions - Do they look tired or distressed? They will exhibit drooped shoulders, pained expressions, slow movement and may be holding onto others. They may be straggling and have dropped off the main tour group - Or do they look comfortable and happy? They will have shoulders back, be alert and smiling, and be talking (perhaps, joking) with others) • Listening to comments made – these are comments made by people to other tour group members, or their partners or sub-group - Comments which could give rise to concern are the obvious ones such as "I'm tired", "I need a rest" or "I am not feeling well" - Similarly an outburst from one tour group member directed at another tour group member would likewise give cause for concern • Being informed directly by someone – this may take the form of a tour group member: - Advising they are tired and asking for a rest break - Saying they are feeling unwell and want assistance - Stating they are being annoyed or upset by someone else in the group • Asking regular questions of the group or individuals within the group – to determine if they are OK or not • Creating an environment which encourages them to say if they have any issues, concerns or personal requests.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Slide

Follow itinerary for the tour

Issues to monitor/address:
- Advising on location of facilities
- Selecting locations for breaks, talks and tour activities
- Telling people how long till next stop, attraction and/or refreshment break
- Keeping the group together
- Addressing problems between tour group members
- Asking people to modify their language or behaviour if necessary

Slide 113

Slide No	Trainer Notes

113.	Trainer highlights Tour Guides should pay attention to the following:
	
	• Pointing out nearby washroom and rest room facilities – so people can use the toilet or freshen up
	
	• Selecting suitable sites for delivering information, commentary or responding to questions or requests – such as a shady or dry spot, or one protected from the wind
	
	• Verbally informing people how long (in terms of distance and/or time) until the next stop, site, refreshment stop
	
	• Keeping the group together, physically – and not allowing stragglers
	
	• Addressing problems between members of the group – there can be situations where friction exists between members of a tour group and this manifests itself in ways which threaten the harmony and cohesiveness of the group
	
	• Asking people to modify their behaviour and/or language – where, for example, their actions are:
	    ▪ Culturally insensitive
	    ▪ Socially unacceptable
	    ▪ Illegal
	    ▪ Threatening or intimidating to others
	    ▪ Causing anxiety, distress or ill-feeling within the group.

Slide

Slide No	Trainer Notes
114.	Trainer discusses activities involved in following tour itinerary
	Counting participants
	Counting participants throughout a tour is necessary to confirm all participants are still with the tour, or identify if someone is missing. Counting of tour group participants should occur:
	• Regularly – on an on-going basis: a time-based check may be used, say, every 10 – 15 minutes
	• Before the tour leaves a point where participants have had to leave a vehicle – to verify all those who got off have got back on
	• At certain points along a walking tour which are not 'too far' apart.

Slide

Follow itinerary for the tour

Techniques to help with counting participants:

- ⊙ Be sure of starting numbers
- ⊙ Update manifest if person quits/leaves the tour
- ⊙ Do physical head counts at nominated locations
- ⊙ Ask customers for help/input/to check
- ⊙ Record head counts in accordance with required protocols

Slide 115

Slide No	Trainer Notes

115.	Trainer presents techniques to assist with counting tour group members include
	
	• Being certain of the starting number when the tour departed – as this is the reference point for the checks
	
	• Updating records (manifests, passenger list) if a person notifies they are electing to quit the tour – tour group members usually have the right to leave a tour whenever they want to. The fact they have started the tour does not compel or obligate them to finish it
	
	• Doing a physical head count of participants when the group arrives at a pre-determined head count point – this can involve:
	  ▪ Physically counting people as they stand or sit
	  ▪ Asking people to respond to a roll call using the manifest or passenger list as the basis
	  ▪ Standing by the entry door of a vehicle and checking people as they re-board after a visiting/viewing experience – and ticking them off against the manifest
	  ▪ Counting the number of seats filled on the bus when people have re-boarded – 45 participants should equate to 45 seats filled
	
	• Asking tour group members a question "Is everyone here? Can you please check to see we are all here?" – this:
	  ▪ Is an extremely effective approach
	  ▪ Should be accompanied by a supplementary check
	
	• Always recording the count to demonstrate 'due diligence' – recording:
	  ▪ Pax
	  ▪ Time
	  ▪ Location.

Slide

Follow itinerary for the tour

Principles of tour guiding which may need to be applied can:

- Be prescribed by individual Tour Operators
- Be contained in 'Codes of Conduct'
- Flow from ethical business practices
- Evolve over time in response to business activities, problems and customer feedback

Slide 116

Slide No	Trainer Notes
116.	Trainer discusses activities involved in following tour itinerary
	Demonstrating principles of tour guiding
	• Employers and tour group members expect all Tourist Guides to operate according to accepted tour guiding principles
	• Tour guiding principles are guidelines governing how Tour Guides operate and function
	• The principles govern and control the thoughts, action and speech of Tour Guides in their day-to-day working life
	• Tour guiding principles can exist in a number of ways:
	▪ They can be requirements imposed on Tour Guides by their employer – as part of the terms and conditions of employment with a Tour Operator
	▪ They may be requirements imposed by a governing body (a government agency or a peak industry body) in the form of a Code of Conduct or similar – designed to give tourists confidence in the services provided by Tour Operators who subscribe to the Code
	▪ They can flow from standard ethical business practices – which demand honesty, accountability and integrity from all organisations regardless of the type of business they operate
	▪ They have evolved over time – in response to issues and problems encountered, feedback from tour group members, market research, common sense and action taken by other businesses in other industry types and sectors.

Slide

Follow itinerary for the tour

Commonly, tour guiding principles address need:

- To ensure safety and security
- For care and respect
- For appropriate skills and abilities
- For knowledge
- To provide a positive and memorable tour
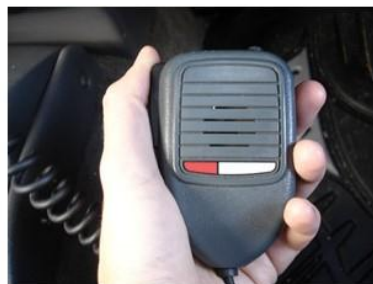- For ethical conduct
- To cater for special needs

Slide 117

Slide No	Trainer Notes
117.	Trainer indicates the areas which comprise the principles of tour guiding: • Need to ensure the safety and security • Need for care and respect • Need for appropriate skills and abilities • Need for knowledge • Need to provide a positive and memorable tour • Need for ethical conduct • Need to cater for special needs individuals and groups. **Classroom Activity– Internet Research** Trainer supervises internet access so students can visit and study relevant websites such as: • http://www.toursbylocals.com/TBL/WebObjects/ToursByLocals.woa/1/wa/textPopup?wosid=MGGNmilnEdy0tGBZHVGdbw&c=16&t=Tour+Guide+Business+Principles&s1=&s2= - Tour Guide Business Principles • http://localprivatetourguides.blogspot.com.au/2010/11/dressing-code-for-tour-guides.html - Dressing code for tour guides

Slide

Slide No	Trainer Notes

118.	Trainer advises providing additional information and assistance may relate to the need to:
	
	• Identify and explain:
	  ▪ Local events and activities
	  ▪ Current issues impacting the country/local community
	• Provide options for free time activities – as opposed to leaving tour group members to their own devices
	  ▪ Most customers will have no idea of the options available and will appreciate direction, suggestions and advice about what they might do and this will enhance their experience and increase their satisfaction with the tour
	• Give general directions in relation to the location and/or use of local facilities – in relation to numerous things such as:
	  ▪ Toilets
	  ▪ Shops
	  ▪ Rides
	  ▪ Points of interest
	• Use anecdotes when interacting with participants – these are short stories relevant to the site, location or tour and are used as they add interest and provide insight into the experience.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Slide

Provide additional information and assistance

Ways to optimise the tour experience for tour group members:
- ⦿ Using humour
- ⦿ Checking on the welfare of individuals
- ⦿ Applying appropriate interpersonal and communication skills

(Continued)

Slide 119

Slide No	Trainer Notes
119.	Trainer presents ways to optimise the tour experience for individuals on the tour:
	• Using humour when talking with people – most tours contain an element of fun and the use of appropriate humour at appropriate times can set the scene for fun and actually impart fun and enjoyment as part of the tour
	• Checking on people's welfare – by asking if they need anything, verifying they are OK and prepared, and helping them solve their problems
	• Applying suitable interpersonal and communication skills at every opportunity/exchange – such as:
	▪ Smiling and using eye contact
	▪ Demonstrating interest
	▪ Responding to questions
	▪ Clarifying information.

Slide

Provide additional information and assistance

- Doing whatever it takes to involve individuals in the tour – to create an 'active' experience for them
- Making sure everyone on the tour receives everything (products, merchandise, vouchers, destinations, experiences) they were promised

Slide 120

Slide No	Trainer Notes
120.	Trainer continues presenting ways to optimise the tour experience for individuals on the tour: • Involving them in what is happening – this can include: ▪ Telling them what is about to happen ▪ Giving them something to do – this may even extend to giving them a simple task to assist (depending on nature of tour and organisational policies) ▪ Giving them something to look at/read • Making sure the tour group receives: ▪ All physical products they have paid for ▪ Every destination and activity which has been advertised ▪ The experiences they have been promised.

Slide

Provide additional information and assistance

Ice breakers – can be used at the start of a tour to help people get to know others on the tour:

- ◉ They are not required/suitable for all tours
- ◉ Should not be used when people already know each other
- ◉ Must be avoided if time is tight
- ◉ Need a suitable/comfortable location to conduct them

Slide 121

Slide No	Trainer Notes
121.	Trainer discusses **Using icebreakers** - Using icebreakers – these are quick exercises/games used at the start of a tour to 'break the ice' and introduce tour group members to each other so they get to learn a little about each other - They are really only suitable where: - ▪ The participants do not already know each other – if the group members already know each other then ice-breakers are often not appreciated and many resent having to participate in them - ▪ There is sufficient time to conduct them – they can be quite time consuming and often not suitable for day tours/excursions: use common sense - ▪ A suitable, comfortable location exists to do them – standing in the heat is not a good location. **Classroom Activity– Internet Research** Trainer supervises internet access so students can visit and study relevant websites such as: See http://insight.typepad.co.uk/40_icebreakers_for_small_groups.pdf and http://training-games.com/pdf/40FreeIceBreakers.pdf

Slide

Provide additional information and assistance

Options for maintaining tour group interest:

- Demonstrating personal passion for the tour and topics/destinations
- Tailoring information to known needs of customers
- Using a prop kit
- Using different approaches instead of the same approach all the time – mix it up a bit!

(Continued)

Slide 122

Slide No	Trainer Notes

122.	Trainer presents options for maintaining interest of people on a tour include:
	
	• Demonstrating personal passion – for the tour and the inclusions
	
	• Tailoring information to the identified needs of the group – while the prepared or scripted commentary will/should have done this, it is also essential to do this with 'issues arising' throughout the tour such as:
	  ▪ In response to questions
	  ▪ When unexpected events and sights arise
	
	• Using a prop kit – for activities and points of interest to add action, excitement, interest and flavour
	  ▪ Always consider including props which can be given to, and used by, tour group participants as a way of involving and including them
	
	• Using variety of approaches – this means 'mixing it up when providing the commentary through the use of:
	  ▪ Humour
	  ▪ Statistics
	  ▪ Questions
	  ▪ Personal anecdotes and experiences.

Slide

Provide additional information and assistance

- Highlighting unexpected events and integrating them into the tour and commentary
- Improvising the commentary as the tour requires
- Striving always to deliver genuine quality customer service regardless of problems
- Demonstrating real interest in and concern for tour group members

Slide 123

Slide No	Trainer Notes
123.	Trainer continues presenting options for maintaining interest of people on a tour:

- Highlighting unexpected occurrences and including them in commentary and integrating them into prepared commentary
- Interacting with tour group – through personal exchanges and questions, sharing experiences and feelings: complaints about Tour Guides relate to their failure to mix with people, talk to them, and/or to demonstrate engagement with them
- Improvising the commentary – by incorporating topics of current interest as identified through interaction with them
  - This highlights the need for Tour Guides to develop the ability to 'think on their feet' and adjust commentaries 'on the fly' to accommodate issues and preferences arising during the tour
- Striving to deliver excellent service regardless of the problems or situations which present themselves – this involves:
  - Turning negative circumstances into positive demonstrations of good service, wherever possible
  - *Asking* people to do things, rather than *telling* them
  - Smiling
  - Treating tour group members as individuals and not as a 'herd'
  - Responding to requests and explaining *why not* when requests cannot be met
  - Being polite and courteous
  - Keeping promises made about the tour – such as the route, activities, inclusions and duration
    - Providing relevant, accurate, timely and informative commentary and comments

	– Keeping tour group members informed about the need to change planned/schedules activities – explaining the reasons why and (where possible) substituting a suitable alternative • Demonstrating interest in tour group members – and their past, current and future experiences: where they have been, what they are doing now and where they are going and what they will be doing tomorrow/next week.

Slide

Provide additional information and assistance

Accommodating the needs and wishes of the group may require allowing for :

- ⦿ Quiet time
- ⦿ Free time
- ⦿ Personal enjoyment of an area/site
- ⦿ Rests/breaks

(Continued)

Slide 124

Slide No	Trainer Notes
124.	Trainer states considering the needs and wishes of participants may include allowing for:
	• Quiet time – to allow people time to relax and savour a view or experience
	• Free time – for tour group members to do their own thing: most tour group members will want some time to do what they want as opposed to doing what has been organised for them
	• A time for people to chat – this may involve chatting amongst themselves, chatting with other people they meet on the tour (locals, shop keepers, other venue staff) or chatting with their Tour Guide
	• Personal enjoyment of site – this is time enabling tour group members to enjoy the tour as best suits them, rather than as imposed by the tour schedule/itinerary
	▪ Some people will prefer a passive orientation where they simply watch and listen while other will want a more active approach where they want to interact with people and activities
	• Tour group members to have a rest – it is important to monitor the group regarding rest breaks and vital to understand the Tour Guide's level of fitness does not dictate the requirements *participants* have to rest and recuperate.

Slide

Provide additional information and assistance

- Photo opportunities – and helping with them/being part of them
- 'Up close and personal' opportunities with people and things
- Preferential treatment

Slide 125

Slide No	Trainer Notes

125.	Trainer continues stating consideration of the needs and wishes of participants may include allowing for:
	
	    ▪ Photo opportunities – always be alert to the need for people to take photographs to record their experience
	    ▪ Many of these 'photo opportunities' are predictable and will remain the same for every tour but there are always unique moments which can arise where people wish to capture the moment
	    ▪ Not being able to take photographs to suit individual need is a major source of complaint/dissatisfaction so be aware of the need to facilitate this. Be prepared, for example to:
	        – Allow extra time where everyone is taking photographs – if there is a need to save time to keep the tour on schedule try to save it somewhere else and not at the expense of restricting photos taken by the group
	        – Offer to take photographs for individuals – so they can be 'in the photo'
	        – Be part of the photo – many people will want their Tour Guide to be part of their photograph
	        – Assist with the photo – by holding bags and other items
	    • 'Up close and personal' opportunities – tour group members expect many things of those who deliver tours and one of their main expectations is the presence of a Tour Guide will gain them access to things which are not available to people who are not on a tour. This means they may request:
	    ▪ A meeting with other staff/people at the site or venue
	    ▪ Access to areas which are 'off limits' to other people/those who are not part of a tour

	▪ Introductions to and/or more contact (effectively, more time) with people/other staff who are available – so they can talk more with the, ask them questions and/or watch them at work
	▪ Special photo opportunities with (for example) animals, characters or unique sights
	• Preferential treatment – this often relates to 'small things' but things which are important to the tour group members:
	   ▪ Being served first when meals are taken – as opposed to having to queue in line with the general public
	   ▪ Being able to sit together for meals/refreshments – as opposed to having to take whatever seats are available
	   ▪ Being given the 'best' seats' when dining – seats with the best view, least disruption by pedestrian traffic
	   ▪ Going to the front of lines/queues for rides, activities, displays, events
	   ▪ Being loaded first onto transport so they can 'sit with each other' and get the 'best seats'.

Slide

Provide additional information and assistance

Providing hands-on participatory activities:

- Must have been planned, approved, risk assessed
- Can include team building activities, entertainment, education, tester activities, fun experiences

Slide 126

Slide No	Trainer Notes
126.	Trainer discusses providing hands-on participatory activities stating: • All participatory activities must be planned – never decide to do one on-the-spot without prior planning, preparation and risk assessment and management ▪ If it has not been organised as an activity before the group arrives for their tour, it is too late to do so when on-tour – the risk of accidents and subsequent legal action is too great • Can include: ▪ A team-building activity – very popular with corporate groups and some clubs; A motivational speaker or guest speaker – often used to align with a stated objective for the group; A new experience; A learning experience; A fun experience; A fitness experience; Activities for children and/or activities for children and parents together; A 'tester' activity – where group members can test/try different activities, sports, games, rides or experiences; A 'treasure hunt' as part of the overall program; Edu-tainment activities – any activity combining aspects of education/learning with entertainment.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Slide

Provide additional information and assistance

Points to note when conducting activities:

⦿ Understand everything about the activity – this is very important

⦿ Make sure the activity is an approved one

⦿ Verify staff required to assist are present and ready

⦿ Time the activity in accordance with itinerary

⦿ Conduct a briefing about the activity

⦿ Tell people the duration

(Continued)

Slide 127

Slide No	Trainer Notes
127.	Trainer notes when conducting hands-on practical activities for tour group points to note are: • Understand **all** there is to know about the activity – and have some degree of mastery so a useful demonstration can be conducted ▪ All activities should have been trialled before tour group members are exposed to them • Double-check to ensure management have approved the activity for use – sight the signed approval documentation • Ensure a check is made before the group arrives that any staff involved in the activity are present and ready to help/participate • Deliver the preceding parts of the tour so group arrives at the activity site at the time agreed/arranged with support staff • Conduct a briefing for the activity • Tell people how long the activity lasts for and when the group has to depart the activity location.

Slide

Provide additional information and assistance

- Ensure all safety aspects are addressed/covered
- Hand out safety gear and equipment
- Distribute and explain/demonstrate use of tools, gear and props
- Demonstrate the activity
- Only permit 'allowed' activity
- Be ready to stop the activity if required

(Continued)

Slide 128

Slide No	Trainer Notes
128.	Trainer continues advising about conducting hands-on activities: • Ensure all safety aspects are covered – explain any rules which may apply • Hand out safety gear, clothing and equipment – of required: demonstrate how to use it and assist participants to wear/become familiar with it • Distribute and explain the use of equipment, props, tools, equipment as appropriate • Provide a demonstration – show people how to undertake the activity – give them tips and 'inside knowledge'/hints about how to succeed, score, achieve the required outcome ▪ People should leave all activities feeling good about themselves, not feeling they are a 'loser' or incompetent • Only allow the activity to occur in accordance with pre-prepared guidelines and within established parameters – this highlights the need to monitor and supervise all visitor action/attempts and provide assistance or corrective advice where needed • Always be ready to stop the activity – or intervene – if it is believed someone is in danger or a dangerous situation has arisen.

Slide

Provide additional information and assistance

- Check suitability/ability of people to participate
- Limit numbers to 'maximum' safe numbers
- Help people as required
- Encourage people as they engage with the activity
- Keep track of time – notify customers as finish nears
- Congratulate participants

Slide 129

Slide No	Trainer Notes
129.	Trainer continues advising about conducting hands-on activities:

- Check the suitability of people to participate – it is a fact of life some tour group members will not be able to undertake some activities due to health or age-related reasons
  - Be tactful when needing to exclude someone from an activity and try to have a substitute available
- Limit participation to established 'maximum numbers' only – where necessary restrict/control the number of tour group members who can participate at any one time
- Help people as necessary – be proactive but realise many people like to find their own way thorough new challenges and work things out for themselves: never *impose* help or force people to accept it
- Encourage people as they participate – and recognise/acknowledge competency and effort
- Keep track of time – notify people of the up-coming end of the activity so the conclusion of the activity does not come unannounced: finish the activity on time so the tour can resume on time according to the itinerary/schedule
- Congratulate participants – and share their excitement and experiences.

Classroom Activity – Demonstration and Practical

Trainer demonstrates how to conduct a hands-on activity and provides opportunity for students to do the same.

Slide

Engage with industry colleagues during the tour

"Industry colleagues' will vary between tours/types and may include:

⦿ Host communities and designated representatives or people

⦿ Other staff working for the Tour Operator

⦿ Third party providers, joint venture partner and agencies

⦿ Animal handlers

(Continued)

Slide 130

Slide No	Trainer Notes
130.	Trainer presents examples of industry colleagues:

- Host communities – including:
    - Acknowledge community leaders
    - Designated elders
    - Nominated spokespeople or representatives
    - Vehicles operated by third party carriers in these communities
- Tour operator employees – such as:
    - Tour managers
    - Drivers of coaches and other vehicles owner and operated by the Tour Operator
    - Office staff
    - Employees responsible for loading vehicles and conducting pre-departure checks
    - Reservation/booking staff
    - Sales and marketing staff
- Third party providers, joint venture partner and agencies – in terms of:
    - Drivers they use/provide
    - Contacts they supply
    - People provided to 'meet and greet' tour group members at destinations and attractions
    - Office staff with reservation, administrative and other related responsibilities
    - Animal handlers – employed to control and/or care for tour or pack animals.

Classroom Activity – Guest Speakers

Trainer arranges for representatives from people identified on the slide to attend and talk to students and talk about their role in relation to the planning and operation of short tours/excursions.

Slide

Engage with industry colleagues during the tour

- Local and independent Guides
- Designated 'arranged persons' for individual tours
- Land owners and managers
- Representatives of statutory authorities

Slide 131

Slide No	Trainer Notes
131.	Trainer continues presenting examples of industry colleagues:

Trainer continues presenting examples of industry colleagues:

- Local and independent guides – who may be have a role to play in:
    - Leading part of the tour
    - Conducting an activity
- Designated/arranged persons ('Contacts') at product suppliers and venues – including:
    - Hotels and restaurants
    - Attractions and sites
    - Retail shops
- Land owners and land managers – for areas which:
    - May be protected by legislation or regulation
    - May be subject to special listing and access requirements
    - Require payment of access/user fees on arrival
- Representatives of statutory authorities – who may need to be advised of:
    - Travel/tour plans
    - Projected usage of areas/sites
    - Numbers of visitors
    - Other detail as applicable to the individual agency/authority.

Classroom Activity – Guest Speakers

Trainer arranges for representatives from people identified on the slide to attend and talk to students and talk about their role in relation to the planning and operation of short tours/excursions.

Slide

Engage with industry colleagues during the tour

Engagement with industry colleagues may require/involve:

⊙ Responding to requests for assistance

⊙ Asking for help

⊙ Liaising with individuals and properties/businesses

(Continued)

Slide 132

Slide No	Trainer Notes
132.	Trainer presents engagement with industry colleagues may include:

- Responding to requests for assistance – from destinations, carriers and suppliers in cases where (for example):
    - They notify they are unable to provide normal services
    - They advise scheduled activities cannot be delivered
    - The expected/organised meals and/or accommodation cannot be supplied as arranged
    - There is a need to re-schedule plans/the sequence of events for the tour
- Asking for assistance – as dictated by a wide number of potential reasons such as:
    - Seeking to accommodate special needs customers who have been identified as the tour begins/progresses
    - Requesting changes to itinerary/normal arrangements – to accommodate issues arising while on-tour
    - Responding to specific requests made by tour group members while participating in the tour
- Liaising with individuals and properties – in order to:
    - Make operational decisions
    - Alter planned arrangements
    - Advise of changes and issues impacting the tour
    - Keep people appraised of tour progress and where the tour 'currently' is and its expected arrival at other locations.

Slide

Slide No	Trainer Notes
133.	Trainer continues giving examples of engagement with industry colleagues:
	• Providing support for the work of industry colleagues – such as:
	▪ Supplying information and facts as required by others in relation to the tour and operational details
	▪ Passing on feedback received from tour group members
	▪ Assisting others complete their work as it relates to the tour/s
	▪ Integrating other/new requested work-related activities into standard tour protocols
	• Anticipating requests – from stakeholders and:
	▪ Responding positively
	▪ Responding proactively
	▪ Striving to achieve a mutually beneficial outcome
	• Communicating with venues, sites, destinations and providers – and:
	▪ Confirming forward bookings
	▪ Advising operators of expected arrival time, group numbers, special requests and timing constraints that may apply
	▪ Making arrangements
	▪ Negotiating changes to standard arrangements
	• Making payment for services and products rendered according to previously agreed arrangements, or as required – to:
	▪ Suppliers/providers and venues
	▪ Carriers.

Slide

Respond to issues arising while on tour

'Issues' in this context may include:
- Traffic accident not including tour vehicle
- Road closures causing tour detours
- Unexpected closure of a destination/attraction
- Late departure from muster point
- Weather impacting tour area
- Directives from officials 'not to enter' certain areas

Slide 134

Slide No	Trainer Notes
134.	Trainer indicates issues that may need to be handled relate to relatively minor problems and happenings which occur while on-tour could include: • Traffic accidents (not involving tour vehicle) causing delays to the tour • Road closures forcing detours • Unexpected closure of a destination/attraction listed on the itinerary • Late departure from muster point • Weather conditions impacting the areas to be visited • Directives from officials not to enter certain areas.

Slide

Slide No	Trainer Notes
135.	Trainer explains keys to action in these circumstances:
	• Identify them as soon as possible – be alert to their potential and do not ignore them when they occur. The sooner they are identified, the better
	• Think – consider the situation and determine what action will suitably address the problem using a combination of:
	▪ Common sense
	▪ Local and industry knowledge
	▪ Input, suggestions and preferences of the tour party
	▪ SOPs – which are plans prepared by the organisation for Tour Guides to use/follow in the event certain issues arise
	– It is important to 'respond' and not to 'react'
	• Produce a solution which duplicates to the best extent possible the original itinerary sold to the customers – in terms of all relevant criteria such as:
	▪ Timing
	▪ Inclusions – destinations, attractions, sights and sites
	▪ Vehicles and routes
	▪ Overall experience and value-for-money
	▪ Tour group preferences.

Slide

Slide 136

Slide No	Trainer Notes

136.	Trainer explains responses to issues arising may include:
	
	• Modifying and re-planning itinerary – based on:
	  ▪ Changed conditions; Circumstances; Customer requests and/or preferences
	• Adjusting timing – in order to:
	  ▪ Meet deadlines for services and activities; Meet pre-arranged arrival and departure times; Coordinate with schedules of third party carriers; Finish the tour on-time
	• Notifying customers of changes – including:
	  ▪ Describing the cause of the problem; Explaining how the issue has impacted the tour; Detailing why and how the changes to the itinerary have been determined; Explaining the changes to the initial itinerary detailing :
	    – How it impacts the tour; The benefits which might flow to the group from the changes – this highlights not all issues necessarily cause a *negative* outcome
	• Notifying relevant others of changes which have to be made – these may include:
	  ▪ Venues; Sites; Destinations; Providers of scheduled goods and/or services; Head office.
	
	Classroom Activity – Exercise
	
	Trainer provides itinerary and issue 'scenario' asking students to suggest options for effectively addressing the issue to minimise impact on the tour and deliver the tour to the best extent which reflects the original itinerary.

Slide

Deal with unexpected events and emergencies

Unexpected events and
emergencies may include:

- Systems failure
- Incidents/accidents involving
  tour vehicle
- Accident, injury or death of tour
  group members
- Inappropriate/unacceptable
  customer behaviour
- Unpredictable animal behaviour

Slide 137

Slide No	Trainer Notes

137.	Trainer identifies in this context the nature of unexpected events and emergencies can vary with tour types and the specifics of individual tours and groups, but may include:
	
	• Systems failure – including significant technical and equipment failure
	• Incidents relating to tour vehicle – such as:
	  ▪ Vehicle breakdown
	  ▪ Vehicle accidents
	• Situations involving tour group members – which may result in:
	  ▪ Injury
	  ▪ Accident
	  ▪ Death
	• Inappropriate customer behaviour – which is:
	  ▪ Impacting the enjoyment of the tour by other tour group members
	  ▪ Contravening expected codes of conduct
	• Unpredictable animal behaviour.

Slide

Deal with unexpected events and emergencies

Handling unexpected events and emergencies may involve:

◉ Implementing applicable plans for the situation

◉ Notifying authorities/emergency services

◉ Communicating with tour group members

◉ Prioritising action to be taken

◉ Taking charge of the situation

(Continued)

Slide 138

Slide No	Trainer Notes

138.	Trainer explains handing of unexpected and emergency events should/could involve:
	
	• Implementing contingency and/or emergency plans – as developed for each individual tour/excursion
	
	• Notifying authorities and/or emergency services – by phone or radio to obtain assistance
	
	  ▪ The Operations Package/Folder for the tour will contain these plans and/or they may be available electronically
	
	• Maintaining communication with customers – to:
	
	  ▪ Advise them of action they need to take to remain safe
	
	  ▪ Reassure them and keep them calm
	
	  ▪ Notify them of action to be taken by the tour in response to the unexpected event
	
	• Prioritising action to be taken – this ALWAYS means optimising the safety of customers and placing the **safety of people** above the protection/security of property and assets
	
	• Taking charge of the situation – by:
	
	  ▪ Assuming authority
	
	  ▪ Taking charge
	
	  ▪ Issuing directives to customers.

	Classroom Activity – Guest Speaker
	Trainer arranges for Tour Guide from Tour Operator to attend and discuss planning and actions related to:
	• Responding to issues arising on tour
	• Dealing with unexpected events and emergencies on tour
	• Generally planning for and operating short tours.

Slide

Deal with unexpected events and emergencies

⊙ Being proactive
⊙ Apologising
⊙ Adhering to required protocols

Slide 139

Slide No	Trainer Notes

139.	Trainer continues explaining handing of unexpected and emergency events should/could involve:
	
	• Being proactive – in terms of:
	  ▪ Responding in an appropriate and timely manner
	  ▪ Taking action to minimise the adverse impact of the unexpected event on the conduct, and customer enjoyment of, the tour
	
	• Apologising for the event – this is standard practice even where the cause of the situation is not the fault of:
	  ▪ The tour
	  ▪ The Tour Guide
	  ▪ The Tour Operator
	
	• Adhering to host enterprise policies and procedures – with regard to:
	  ▪ Never admitting liability on behalf of the Tour Operator in relation to any event or incident
	  ▪ Not promising any form of recompense to those who have bought tickets/are on the tour
	  ▪ Referring customers to management, head office or to duty supervisor – on arrival of the tour back at the departure point, where applicable
	  ▪ Re-stating relevant statements in the Terms and Conditions of the tour – in relation to issues such as:
	    – 'The Tour Operator reserves the right to substitute destinations, attractions, activities and inclusions as required'
	    – 'Where there is a need to alter the advertised itinerary the Tour Operator will make every effort to replace the amended inclusion with an event/activity of similar type and value-for-money'.

Classroom Activity – Simulation Exercise

Trainer describes and creates an on tour experience/scenario and introduces a specified unexpected event or emergency and asks students to determine response to same.

Slide

Deal with unexpected events and emergencies

Tips for coping:
- ◉ Realise no problem will ever resolve itself – they only get worse and affect more people
- ◉ All identified issues MUST be addressed – never ignore an issues and hope it will go away
- ◉ Treat people with respect
- ◉ Try to stay calm – practice doing this: put yourself into stressful situations

(Continued)

Slide 140

Slide No	Trainer Notes
140.	Trainer presents tips for handling problems with tour group members: • Realise no problem will ever resolve itself – problems require action to fix/address them ▪ Take responsibility for taking action – it is part of the job to do so • All identified issues must be addressed – never simply ignore a problem ▪ If appropriate/possible, look for 'safety angle' on which to focus the conversation to be had with those creating/causing a problem or issue ▪ People are more likely to listen and comply if it can be demonstrated they need to alter what they are doing because it is unsafe or poses a risk to others • Treat people with respect – talk politely with them allow them their dignity ▪ Aim to make the other person feel special, not to feel victimised ▪ Talk with people who need to be spoken to away from others in order to respect their right not to be embarrassed or challenged in front of others • Try to stay calm – when a need to intervene and say something to a participant arises ▪ 'Act' but do not 'over-react' ▪ Avoid using a loud voice and try to speak so the conversation is private, and so the participant/s do not feel as if they are being reprimanded in front of the rest of the group and being made to look silly or 'small'.

Slide

Deal with unexpected events and emergencies

- Be sensitive to HOW things are said to people – it's not what you say but how you say it
- 'Request' people modify their behaviour rather than demand they do so
- See the tour through the eyes of the tour group members – not just through the eyes of a Tour Guide

Slide 141

Slide No	Trainer Notes

141.	Trainer continues presenting tips for handling problems with tour group members:
	
	• Phrase what is said so it is not a personal 'attack' on the other person – for example, instead of saying "You must not do that", re-phrase the statement to "We prefer such action does not take place while here/on tour/in this location"
	
	• Try phrasing statements asking people to modify their behaviour as 'requests' rather than 'commands'
	   ▪ Give reasons why the request is being made
	   ▪ There is big difference between 'Stop doing that' and "Could I please ask you not to do that because it scares the animals?"
	
	• Look through the eyes of the tour group member and try to see things from their perspective
	   ▪ For example, consider saying "I can see you are tired and I know we have walked quite a long way and it is hot, but I need you to know it is not acceptable for the safety of others for you to wander off on your own to have a rest".

Slide

Deal with unexpected events and emergencies

If there are problems between tour group members, always remember:

- It must be the Tour Guide who is in charge of the tour – not the tour group members
- Ask for assistance when help is needed in dealing with these situations

Slide 142

Slide No	Trainer Notes
142.	Trainer discusses addressing problems between tour group members highlighting when dealing with problems *between* tour group members always remember: • It must be the Tour Guide who is in control of the tour – not the tour group members who are in control • Never be afraid of asking for help or back-up from management, other staff or security – using two-way radio, or cell phone.

Slide

Slide No	Trainer Notes
143.	Trainer presents techniques to address problems between tour group members include: • Ask the two parties to come to one side and talk – it is important everything said when addressing issues involving two parties is spoken in front of both parties so there can be no suspicion/question over what is said • Where the tour is long one, attention should be paid to trying to resolve the root cause of the issue – where the tour is a short one, attention should focus on developing a solution to effectively address the problem until the tour has finished • Ask the parties what the problem is – this allows insight and also allows the parties to get things off their chest • Explain how their behaviour is adversely impacting the enjoyment of other tour group members.

Slide

Deal with unexpected events and emergencies

- ⊙ Request they refrain from further similar actions
- ⊙ Thank them for their expected cooperation
- ⊙ Suggest a way to solve things in the immediate short-term – re-seat/re-group people; ask parents to better supervise children
- ⊙ Monitor the situation and be prepared to continue intervening and taking action/making efforts to resolve the situation

Slide 144

Slide No	Trainer Notes

144.	Trainer continues presenting techniques to address problems between tour group members:
	
	• Ask them to refrain from further action which disrupts the tour – and thank them for their cooperation
	
	• Be prepared to suggest solution as to assist resolve the issue in the immediate short-term, such as:
	  ▪ Re-seating people to different locations (for example, on the coach) so they are not near to each other, or are out of line-of-sight of the other person/party
	  ▪ Asking parents to more closely supervise their children
	  ▪ Re-grouping participants into different configurations so those having problems with another person/group in conflict are in different sub-groups when it comes to things such as viewing, activities, dining
	
	• Monitoring the situation – and being prepared to:
	  ▪ Repeat previous requests – it is naïve to believe people will modify their behaviour just because they have been asked once to do so
	  ▪ Suggest alternative solutions to issues – and allow them to choose their preferred option
	  ▪ Thank people for their cooperation.

Slide

Conclude the tour as planned

Context for concluding tours:
- No tour should just 'end'
- It should conclude as planned to:
  - Maintain professionalism
  - Optimise customer experience
  - Give people chance to give feedback
  - Leave a positive impression

Slide 145

Slide No	Trainer Notes
145.	Trainer provides context for concluding tours. • No tour/excursion should just 'end' • All tours/excursions should 'conclude' in accordance with plans made for them so: ▪ The professionalism of the Tour Operator is maintained ▪ Tour group participants get the most from their experience ▪ Customers have an opportunity to provide feedback ▪ People who have been on the tour/excursion are left with a positive impression as their last sentiment about the tour.

Slide

Conclude the tour as planned

The conclusion may occur in several parts – such as:

- ◉ On the tour vehicle – as it returns
- ◉ At the point of disembarkation:
- ◉ On vehicle when tour vehicle is parked
- ◉ Near vehicle when people have got off
- ◉ In a meeting room

Slide 146

Slide No	Trainer Notes
146.	Trainer notes the 'conclusion' often occurs in several parts – such as:
	• On the tour vehicle – as it returns to the departure/end point for the tour
	• At the point of disembarkation – which can include:
	▪ Activities on the tour vehicle when it has parked
	▪ Activities near the tour vehicle when people have alighted from the vehicle
	▪ Activities in a certain location (such as meeting room).

Slide

Conclude the tour as planned

Activities which may comprise conclusion of tour:

- Providing a verbal summary of the tour
- Collecting items which need to be returned
- Escorting and helping people from tour vehicles

(Continued)

Slide 147

Slide No	Trainer Notes
147.	Trainer indicates activities which may comprise conclusion of tour:
	Providing a tour summary
	This could be done by:
	• Recapping the route taken; Reminding customers of highlights and key facts; Giving a verbal recap of the inclusions covered by the tour; Sharing experiences; Involving tour group members and asking them to contribute their input.
	Collecting returnable items
	There may be a need to get back items given to customers intended only for 'on-tour' use. These items may be:
	• Safety equipment; PPE; Sporting equipment and items; Camping gear; Resources used in practical, hands-on activities; Electronic tour guide equipment – such as the devices provided to customers which provide personalised audio, information and navigation services to visitors/customers to enhance their tour experience of certain locations/destinations.
	Escorting customers off/from vehicles
	Escorting customers off/from vehicles may involve:
	• Controlling sequence of disembarkation; Assisting people obtain their on-board luggage/bags; Reminding people to check seats and relevant other areas for items to avoid lost/forgotten items; Helping people step-down from vehicles; Helping people with their luggage/bags; Assisting with directing customers to other transport to get them to their next destination.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates to students how to conclude a tour and provides opportunity for students to do the same.

Slide

Conclude the tour as planned

- Farewelling tour group members
- Capturing feedback
- Cleaning

Slide 148

Slide No	Trainer Notes
148.	Trainer continues indicating activities which may comprise conclusion of tour:

Farewelling tour group members

At the end of the tour this will necessitate:

- Thanking them for taking the tour
- Providing a farewell wish
- Expressing hope they enjoyed the tour/experience
- Encouraging repeat tours
- Notifying them of upcoming events and specials – which may encourage them to return for another tour
- Handing out promotional literature – promoting other tours available through the same Tour Operator
- Inviting them to tell others about the tour
- Distributing merchandise/product as required on departure of tour group members.

Capturing feedback

Tour Operators usually seek feedback from those who have taken a tour and this may require:

- Distributing feedback forms
- Encouraging completion of Customer Comment Cards
- Mentioning online feedback options
- Talking to people about their tour and experience
- Seeking contributions for improvements and changes to the tour

	• Asking if people have complaints – and:
	▪ Taking action within individual designated scope of authority to resolve those complaints/issues
	▪ Referring customers to management where/if necessary or appropriate
	• Actively soliciting feedback and listening to and recording responses
	• Thanking people for their input/feedback.
	Cleaning
	Cleaning up at the end of a tour may involve:
	• Cleaning vehicles – interiors and exteriors
	• Tidying arrival and departure points
	• Replenishing materials, handouts, promotional materials and merchandise distributed to (or taken by) tour group members.
	Classroom Activity – Excursion
	Trainer arranges for students to participate in a short/day tour so they can:
	• Observe activities
	• Experience what takes place
	• View Tour Guide actions
	• Listen to commentary and exchanges between Tour Guide and customers
	• Obtain handouts
	• Talk with Tour Guide and other tour group members
	• Take note of activities and issues.

Slide

Summary – Element 2

When conducting the tour:

- ◉ Conduct a tour briefing and welcome customers to the tour
- ◉ Present an overview of the tour and explain the itinerary
- ◉ Distribute required equipment and tour-related resources
- ◉ Explain safety requirements and behavioural codes/expectations

(Continued)

Slide 149

Slide No	Trainer Notes
149.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Summary – Element 2

⦿ Start on-time
⦿ Help customers board tour vehicles
⦿ Engage and interact with tour group members and encourage their participation
⦿ Create and project personal confidence and credibility
(Continued)

Slide 150

Slide No	Trainer Notes
150.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide	

193

Summary – Element 2

- Follow the tour itinerary
- Provide a commentary according to tour and group requirements
- Count/keep track of tour group participants
- Oversee and manage the tour group responding to issues, events and emergencies as required

(Continued)

Slide 151

Slide No	Trainer Notes
151.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Slide No	Trainer Notes
152.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Slide 195

Slide No	Trainer Notes
153.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Element 3 – Complete post-tour activities

Performance Criteria for this Element are:

- Complete tour report and documentation
- Process cash, vouchers and other charges
- De-brief with other tour staff
- Pass on feedback received from customers to management

Slide 154

Slide No	Trainer Notes
154.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide.
	Class Activity – General Discussion
	Trainer leads a general class discussion by asking questions such as:
	• What is a tour report and what details would it contain/address?
	• What other documentation might need to be concluded?
	• What processing would need to be undertaken in relation to cash and tour-related vouchers?
	• Why would there be a need for the Tour Guide/person coordinating or operating the tour to de-brief with other staff? What would they discuss? When and where?
	• Why would management be interested in feedback from tour group members?

Slide

Complete tour report and documentation

Tour Guides are required to complete end-of-tour documents to assist with:

⊙ Costing tours

⊙ Controlling costs

⊙ Determining if there is a need to increase ticket/tour prices – or if they can be decreased in price

(Continued)

Slide 155

Slide No	Trainer Notes
155.	Trainer explains the information provided by Tour Guides when they complete/conclude their tours is required by the Tour Operator to assist with:
	• Costing tours – that is, finalising details of expenses associated with *actually* conducting each tour as measured against *projected* costs for conducting the tour
	• Controlling costs – by amending resource allocations to tours in order to maintain/retain required 'return on investments' for tours
	• Determining the need to increase prices for tickets/tours – based on knowledge of actual costs incurred with previous tours.

Slide

Complete tour report and documentation

- ⦿ Monitoring customer feedback and responses to/satisfaction with tours and their experience
- ⦿ Helping deter theft
- ⦿ Paying people/organisations and providers
- ⦿ Taking appropriate action in response to a range of identified/emerging issues

Slide 156

Slide No	Trainer Notes

156.	Trainer continues explaining need for Tour Guides to complete end-of-tour documents to assist with:
	
	• Monitoring customer responses and feedback to tours – in terms of:
	  ▪ Satisfaction levels
	  ▪ Complaints and compliments
	  ▪ Suggestions for change
	
	• Helping to deter theft – there is likely to be less stealing of company resources when staff know items have to be accounted for and relevant paperwork has to be completed when tours return
	
	• Paying people and organisations who have legitimate claims – such as:
	  ▪ Wages to Tour Guides, drivers and cooks
	  ▪ Money to third party providers for goods and services supplied
	  ▪ Commissions to agents/those who sold tickets or referred paying customers
	
	• Taking appropriate action – in response to issues raised such as:
	  ▪ Need to arrange repairs, maintenance and/or replacement of vehicles or tour equipment
	  ▪ Need to revise/amend operational, contingency and/or emergency plans – on the basis of what occurred on the tour
	  ▪ Need to contact third party providers – to discuss, investigate and/or resolve issues raised or situations of concern.

	Classroom Activity – Guest Speaker
	Trainer arranges for suitable owner/manager of a local Tour Operator business to attend and discuss:
	• The documents they require Tour Guides to complete at the end of tours
	• Why they want these documents to be completed
	• Examples of how these documents have helped operate the business/maintain its viability
	• Guest Speaker should also be asked to provide samples of documents referred to in their talk.

Slide

Complete tour report and documentation

Documentation which may need to be completed:

◉ Tour report
◉ 'Suggestions'
◉ Vehicle usage
◉ Maintenance report

If there has been an incident on-tour there will be a need to complete an 'Incident Report'.

Slide 157

Slide No	Trainer Notes
157.	Trainer identifies documents which may need to be competed:
	• Tour report – this is a *pro forma* document where Tour Guides add a range of details identified as being important/necessary by administration or the Tour Operator
	• Completion of this Report is usually mandatory before the Tour Guide responsible for the tour leaves to go home, or takes another tour and provides a range of details about the tour they have just concluded such as:
	▪ Day, dates, times, numbers, name/type of tour, problems and issues, responses to same, other information as required by individual Tour Operator
	• Suggestions form – which relate to ideas from Tour Guides for new/revised/updated tours
	• Vehicle usage books – recording day, date, times used, driver of vehicle, odometer readings at start and finish, problems with vehicle
	• Maintenance reports and requests.
	Classroom Activity – Handouts and Practical
	Trainer distributes and discusses sample documentation as identified on the slide and presents students with opportunity to complete same simulating reports/information at end of a nominated tour.

Slide

Process cash, vouchers and other charges

Processing cash/reconciling money can involve:
- Calculating cash spent
- Compiling receipts
- Counting 'cash on hand'
- Balancing funds
- Investigating variances
- Forwarding cash on hand

Slide 158

Slide No	Trainer Notes
158.	Trainer indicates processing activities will often require: **Reconciling money** This means: • Calculating the cash spent while on-tour • Compiling receipts to prove each of the above expenses • Counting the 'cash on hand' that remains • Balancing funds such that the total of the receipts plus cash on hand equals the money provided at the start of tour • Investigating and explaining any variances • Forwarding cash on hand to administration and signing it back in. **Classroom Activity – Demonstration and Practical** Trainer demonstrates how to process cash as described above and provides opportunity for students to do the same.

Slide

Process cash, vouchers and other charges

Reconciling vouchers can necessitate:

- Recording serial numbers of vouchers used
- Validating number of vouchers used
- Investigating variances
- Forwarding remaining vouchers

Slide 159

Slide No	Trainer Notes
159.	Trainer indicates processing activities will often require:
	Reconciling vouchers
	This may involve:
	• Recording the serial numbers of vouchers used on a destination-by-destination basis
	• Validating only the expected/allowed number of vouchers were used for the tour
	• Investigating and explaining any variances
	• Forwarding remaining vouchers to administration and signing them back in.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates how to reconcile vouchers as described above and provides opportunity for students to do the same.

Slide

Process cash, vouchers and other charges

Completing paperwork to support other processing – such as:

- Invoicing customers for extra charges/expenses
- Recouping money from customers who have lost or damaged items
- Paying/authorising payment for third party providers

Slide 160

Slide No	Trainer Notes
160.	Trainer indicates processing activities will often require:
	Completing paperwork to support other processing
	This can relate to:
	• Invoicing of charges to individual customers for extra services/products provided as additional items as requested
	• Invoicing of charges to recover items damaged or lost by customers
	• Payment to third party providers – for (extra) goods and services used by/supplied to the tour.

Slide

De-brief with other tour staff

Frequency/timing of de-briefings:
- ⊙ Will vary between Tour Operators
- ⊙ Regular short tours often do not de-brief after every tour
- ⊙ Certainly a de-brief will occur:
  - • After custom/private (one-off) tours
  - • If there was a problem on a scheduled/regular tour which demands immediate attention

Slide 161

Slide No	Trainer Notes
161.	Trainer discusses frequency of de-briefings stating:
	• Timing of de-briefings will vary between Tour Operators
	• For scheduled/regular day tours/short excursions, de-briefings may not take place after every tour
	• They may occur every month to every three months
	• The only exception to this might be the need to de-brief immediately after:
	▪ An especially important/significant custom/private tour where it is believed (for example) there is the potential for the Tour Operator to leverage this experience to gain traction/more business from a certain market/business
	▪ There was a problem with a scheduled/regular tour demanding immediate attention.
	Classroom Activity – Guest Speaker
	Trainer arranges for Tour Guide to attend and discuss de-briefings at the end of short/day tours.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Slide	

De-brief with other tour staff

Those involved may include:
- Other tour staff
- Management and Department Heads
- Marketing and administration
- Various representatives – from partnering businesses and/or clients/tour groups

Slide 162

Slide No	Trainer Notes

162.	Trainer discusses those potentially involved in de-briefings stating:
	
	• The de-briefing may involve a meeting with people/representatives from:
	  ▪ Co-workers who were on-tour
	  ▪ Management
	  ▪ The marketing department
	  ▪ Administration
	  ▪ Heads of departments/sections
	  ▪ Representatives from:
	    – Third party providers
	    – Agents/agencies
	    – Joint venture partners.
	
	The Tour Operator may elect to invite a representative from the client where the de-briefing relates to a custom/private tour in order to:
	
	• Obtain first-hand feedback from them
	• Prove to them the importance the organisation places on their business and how much it values their custom and is striving to retain it.

Slide

De-brief with other tour staff

Tour Guide may lead the de-briefing and address:

- ◉ Tour events and the tour in general
- ◉ Feedback from customers
- ◉ Analysis of the tour
- ◉ Lessons learned
- ◉ Emerging/identified opportunities

Slide 163

Slide No	Trainer Notes
163.	Trainer explains why de-briefings are held stating: • The de-briefing is held to identify and address a wide range of issues. The Tour Guide generally: 　▪ Leads the discussion 　▪ Responds to questions asked by others 　▪ Requests support and/or additional explanations or input from other tour staff who are present • The de-briefing may follow a standard agenda which can address the following topics: 　▪ Discussion of events and the tour in general 　▪ Presentation and review of feedback from customers 　▪ Consideration of the feasibility and practicability of the tour – including ideas for achieving/retaining required return on investment and maintaining the viability of the tour and the Tour Operator 　▪ Identification of lessons learned and how and why they need to be applied elsewhere/in the future 　▪ Identification of need to produce new (or review existing) plans, checklists, loading allocations, resources, staffing arrangements, inclusions and/or itineraries 　▪ Identification of opportunities for improvements, other tour types and/or potential tour group customers.

Slide

De-brief with other tour staff

In addition to de-briefing it can be a good idea to make a special effort to thank:
- Group leaders
- Drivers
- Catering staff
- Co-hosts, other Tour Guides and Section Guides
- Safety and security personnel
- Park characters

Slide 164

Slide No	Trainer Notes
164.	Trainer indicates in addition to participating in a formal de-briefing session there may be a need/it can be advantageous for the Tour Guide to thank: • Group leaders • Transport drivers • Catering staff • Co-workers – who did the many things which combine to provide a memorable and effective tour, such as: ▪ Co-hosts/tour guides ▪ Safety officers and Security staff ▪ Monitors and observers – for rides and activities ▪ Park characters ▪ Section guides – specialists in certain areas who deliver information, activities and demonstrations in their particular area of expertise.

Slide

Pass on feedback received from customers to management

Sources of feedback:
- Personal observations by tour staff
- Written comments made by customers
- Input from co-partners
- Should represent 360˚ feedback

Slide 165

Slide No	Trainer Notes
165.	Trainer identifies sources of feedback stating:
	• Feedback which needs to be shared with management can be gained as a result of:
	• Personal observations of customers by tour staff – in terms of:
	▪ Noting the body language of people and watching their reactions at various locations and activities, when they arrive at certain destinations and/or when they engage with nominated attractions
	▪ Listening to what tour group members say while taking part in an activity and/or when they get back on board the tour vehicle and/or when they return after the tour has finished
	• Written feedback provided by tour group members – in terms of:
	▪ Written Comments cards/feedback forms
	▪ Online feedback received
	▪ Letters of complaints and/or compliments received
	• Comments made by and input from third party providers, co-chair operators and/or joint-venture partners
	• The key being feedback must seek to be 360˚ feedback in that the comments should include contributions from all sources/all angles and not just represent the views of the Tour Guide/tour staff.

Slide

Pass on feedback received from customers to management

Ways of communicating feedback:
- In written form
- Making verbal presentation
- Combination of the two

Slide 166

Slide No	Trainer Notes
166.	Trainer explains communicating feedback to management usually occurs in one of two ways: • In written form – where those providing feedback are required to make a contribution in writing. This may be via: ▪ An email ▪ A brief statement ▪ A *pro forma* sheet/report • By making a verbal presentation – to management or at (for example) a scheduled team/department or other meeting • A combination of the above two options may also be required.

Slide

Slide No	Trainer Notes
167.	Trainer highlights Customer feedback is important because it is valuable market research data obtained from actual users noting its value lies in the facts that:
	• It represents feedback about what actually happened
	• It is feedback from those who actually experienced it
	• It is timely, recent and relevant
	• The issue/s at the root of it is of such concern to the customer they actually took the time and made the effort to say something about it – it is/was IMPORTANT to them
	• Customer feedback are the school books from which organisations learn – if a business wants to grow and remain viable it MUST listen and respond to what its customers say: what customers say is more important than/just as important as what management think and what the competition is doing.

Slide

Summary – Element 3

When completing post-tour activities:

- ⦿ Complete the required tour report providing required information and details
- ⦿ Finalise other required/necessary tour-related documentation
- ⦿ Reconcile cash and vouchers
- ⦿ Process other charges

(Continued)

Slide 168

Slide No	Trainer Notes
168.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Summary – Element 3

- ⦿ Investigate and resolve variances and issues
- ⦿ Forward relevant documentation for further processing
- ⦿ De-brief with other tour staff, management, administration and appropriate stakeholders

(Continued)

Slide 169

Slide No	Trainer Notes
169.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Slide 170

Slide No	Trainer Notes
170.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Trainer thanks trainees for their attention and encourages them to apply course content as required in their workplace activities. |

Trainer Guide
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Recommended training equipment

Examples of documentation provided to Tour Guides and tour group members – such as:

- Tickets/coupons
- Itineraries
- Maps
- Tour information
- Travel advice
- Fact Sheets and FAQs
- Warnings and advisories
- Briefing information
- Promotional brochures and materials
- Merchandise
- Advertisements for day tours/short excursions
- Terms and Conditions for tours/excursions
- Feedback forms/Comment cards

Sample prop kits

Samples of scripted commentaries

Operational documentation such as:

- Operational itineraries
- Loading Sheets
- Operating plans
- Contingency plans
- Emergency plans
- Operations Package/Folder
- Tour briefs
- Tour reports
- 'Voluntary Assumption of Risk' documentation
- Vehicle usage sheets
- Maintenance reports and requests.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

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 **Setup 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.

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)

Appendix – ASEAN acronyms

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

Trainer Guide
Co-ordinate and operate a day-tour (or short excursions)