Receive and process reservations

D1.HFO.CL2.01
D2.TTA.CL2.17

Assessor Manual

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

Receive and process reservations

D1.HFO.CL2.01
D2.TTA.CL2.17

Assessor Manual

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Competency Based Assessment (CBA) – An introduction for assessors

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

Suggested Assessment Methods

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

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

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

Alternative Assessment Methods

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

a) The nature of the unit

b) The strengths of participants

c) The number of participants in the class

d) Time required to complete assessments

e) Time dedicated to assessment

f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audio tapes
- Case studies
- Log books

- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

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

Selection of Assessment Methods

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

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

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

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

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

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

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

Assessing Competency

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

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

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

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

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

Not Yet Competent' (NYC)

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

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

The participant may be required to:

a) Undertake further training or instruction

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

Regional Qualifications Framework and Skills Recognition System

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

The purpose of this framework is to provide:

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

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

Recognition of Prior Learning (RPL)

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

This process is a learning and assessment pathway which encompasses:

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

Code of Practice for Assessors

This Code of Practice provides:

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

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

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity

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

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

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

Preparation

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

Briefing checklist

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

Checklist for Assessors

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

Instructions for Recording Competency

Specifications for Recording Competency

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

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

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

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

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

Assessors should follow these guidelines:

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

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

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

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

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

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name
  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment

- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

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

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

  We have 60 minutes for this assessment.

  - I will give you feedback at the end of the assessment
  - Do you have any questions about this assessment?"
- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

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

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

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

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

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

  We have X time for this assessment:

  - The due date for completion of this assessment is X
  - On this date you must forward the completed questions to the assessor by X time on the date of X
  - Do you have any questions about this assessment?"

- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date
- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

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

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

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

To complete the Observation Checklist the Assessor must:

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

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

Specifications for Third Party Statement

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

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

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

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

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

To complete the Third Party Verification Statement the Assessor must:

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

The Third Party must:

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

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

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

Competency Standard

<table>
<tr><td>UNIT TITLE: RECEIVE AND PROCESS RESERVATIONS</td><td>NOMINAL HOURS: 35</td></tr>
<tr><td colspan="2">UNIT NUMBER: D1.HFO.CL2.01 D2.TTA.CL2.17</td></tr>
<tr><td colspan="2">UNIT DESCRIPTOR: This unit deals with skills and knowledge required to accept, deny and otherwise process reservations for a variety of products and services across all industry sections. Specific skills and knowledge relating to the use of a computerised reservation system can be found in ‘Operate a computerised reservation system’.</td></tr>
<tr><td>ELEMENTS AND PERFORMANCE CRITERIA</td><td>UNIT VARIABLE AND ASSESSMENT GUIDE</td></tr>
<tr><td>Element 1: Describe the elements of the reservation system
1.1 Differentiate between a manual reservation system and a computerised reservation system
1.2 Describe the types of bookings that may be processed
1.3 Identify the ways in which reservations may be received
1.4 Differentiate between customers who may require reservations
Element 2: Respond to reservation requests
2.1 Acknowledge customer who wishes to make a reservation
2.2 Identify required reservation details</td><td>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 the use of manual or computerised reservations systems (CRS) within the labour divisions of the hotel and travel industries and may include:
1. Front Office
2. Housekeeping
3. Food and Beverage Service
4. Food Production
5. Travel Agencies
6. Tour Operation
Differentiate between a manual reservation system and a computerised reservation system must include:
• Identifying of the component parts and elements of each system</td></tr>
</table>

2.3 Advise customer of *availability of requested booking* **2.4** *Offer alternatives* if requested booking is unavailable **2.5** *Offer advice* and information about available products, services and facilities **2.6** *Respond to questions* asked by customer **Element 3: Enter reservation details into system** **3.1** Record *reservation details* **3.2** Update and utilise existing *customer history* **3.3** Confirm booking details with customer on completion of data entry **3.4** Explain relevant *reservation issues* **3.5** *Accept payment* for reservation **3.6** *File reservation* **3.7** Generate *reservation-related documentation* **Element 4: Maintain reservations** **4.1** *Amend existing reservations* as required **4.2** Cancel reservations **4.3** Follow up *unconfirmed reservations* **4.4** *Update internal records*, documents and files as required	• Explaining the functions and facilities of each system • Describing the relative advantages and disadvantages of each system. *Types of bookings* may include: • Accommodation suppliers, including hotels, guest houses, caravan parks • Transport carriers, including aircraft, cruise ships, coaches, limousines • Day and extended tour operators • Rental car companies • Dining and meal reservations • Entertainment • Tourist attractions • Events. *The ways in which reservations may be received* may include: • Telephone • Facsimile • Mail • Face-to-face • Internet/e-mail. *Customers who may require reservations* should include: • Private individual • Groups • Corporate customers • Government agencies • Conference delegates

Element 5: Communicate reservation details to others **5.1** *Notify internal personnel*, service areas and departments in relation to reservations **5.2** *Notify external organisations* in relation to reservations	• VIPs • Agencies with whom the enterprise has a commercial 'commission paid' agreement for sales/bookings, including retail travel consultants, inbound tour companies, other venues/properties. *Required reservation details* should include: • Asking for reservation details • Clarifying relevant reservation details, including names, dates, times and special requests • Repeating back booking details for confirmation. *Availability of requested booking* relates to: • Available • Not available, booking has to be refused/regretted • Available with conditions, such as premium payment, minimum stay length • Available, but at a different rate, time, day, setting, or other required criteria. *Offer alternatives* may relate to: • Advising of waitlist options and standby, where applicable • Suggesting different times, days, carrier, venue, etc • Recommending suitable alternatives. *Offer advice* may relate to: • Attempting to achieve add-on sales • Using up-selling techniques • Making recommendations and suggestions • Providing advice.

	Respond to questions may include: • Providing costs related to the reservation • Advising of product and service features and benefits • Differentiating between available options • Putting customer in contact with relevant internal specialist, where applicable • Taking question on notice, researching the answer and following up with the customer. *Reservation details* may include: • Completing 'required fields' in the computerised reservation system • Specifying dates, times, numbers, names, contact details, plus other criteria, such as flight numbers, seating preferences, car type as required by the individual reservation type • Initiating internal documentation and/or file or folio for the booking • Complying with internal enterprise reservation protocols • Multiple entries on various documents/screens as required by the enterprise systems. *Customer history* may relate to: • Enhancing levels of customer service • Detailing special requests • Sharing data with relevant departments • Confirming existing data. *Reservation issues* may relate to: • Arrival and departure times • Payment, including advanced deposits • Guarantees and warranties that exist, including identification of instances where they do not exist or apply

	• Refund and exchange policies • Final confirmation • Dates for final payment, where applicable. *Accept payment* may relate to: • Accepting credit card payment over the telephone • Explaining required payment details, including amount required and due by dates • Accepting advanced deposits • Explaining the enterprise's policies regarding payments and deposits • Explaining that all bookings are tentative until payment is received, where applicable. *File reservation* may relate to: • Simple paper-based entry • File naming of electronic files • 'saving' reservations on the computerised reservation system • Visually confirming the reservation has been saved, where appropriate. *Reservation-related documentation* may relate to: • Invoices, credit notes and receipts • Reservation confirmations • Bookings slips, guest folios and other enterprise-specific records • Service vouchers • Information packs and brochures • Distributing documentation as required.

	Amend existing reservations may relate to: • Changing stay lengths, dates • Altering flight, or travel details and itineraries • Changing times and customer numbers • Updating customer contact and billing details. *Unconfirmed reservations* may relate to: • Contacting customer for verbal feedback • Soliciting payment • Advising of status of reservation subject to non-payment • Making courtesy reminder calls • Advising customers of enterprise requirements for reservation confirmation and payment. *Update internal records* may relate to: • Recording payment amounts made, such as payment in full, deposits • Adjusting records to reflect refunds given and discounts allowed • Entering financial data into paper-based or electronic financial records, as required by the enterprise • Preparing records for night audits and report generation, as required • Complying with internal record keeping and accounting protocols. *Notify internal personnel* may relate to: • Immediately notifying urgent requests, special requests, VIPs and late reservations • Passing on information to the area that is the host for the booking, as well as all other relevant support departments and personnel • Providing all relevant reservation details, such as times, dates, special requests, guest status, payment status, promises made.

	Notify external organisations may relate to: • Immediately notifying urgent requests, special requests, VIPs and late reservations • Providing all relevant reservation details, such as times, dates, special requests, guest status, payment status, promises made • Indicating details of commissions payable/receivable. **Assessment Guide** The following skills and knowledge must be assessed as part of this unit: • The enterprise's policies and procedures in regard to processing reservations, customer service, deposits and refunds • Keyboarding, data entry and written skills • Customer contact, inter-personal and negotiation skills • Selling skills • Telephone skills • Product knowledge of the products and services being sold • System knowledge relating to operational and trouble shooting matters for a computerised reservation system, where applicable • Secure log-on and log-off procedures, including need to change passwords regularly for a computerised reservation system, where applicable • Codes used for the host enterprise system to enable accurate and speedy coding and decoding of entries for a computerised reservation system, where applicable • Understanding of the requirements for mandatory system fields for a computerised reservation system, where applicable • The inter-related nature of paper-based documents and files used to process reservations using a paper-based/manual reservation system.

	Linkages To Other Units • Operate an automated information system • Access and retrieve computer-based data • Access and interpret information • Book and coordinate supplier services • Administer a billing and settlement plan • Apply advance airfare rules and procedures • Construct and ticket a non-air travel plan • Construct and ticket domestic airfares • Construct and ticket promotional international airfares • Construct and ticket regular international airfares • Produce travel documentation on a computer • Source and provide destination information and advice • Prepare and submit quotations • Promote tourism products and services • Use common business tools and technology. **Critical Aspects of Assessment** Evidence of the following is essential: • Understanding the potential and limitations of the manual or computerised reservation system used by the host enterprise • Demonstrated ability to access and manipulate nominated system data on a computerised reservation system, where applicable

	• Demonstrated ability to accept and process nominated types of reservations, including:
	  ▪ Determining availability
	  ▪ Recording the reservation appropriately
	  ▪ Confirming the reservation details with the caller/person making the booking
	• Demonstrated ability to decline a reservation
	• Demonstrated ability to cancel a nominated reservation and process a refund, if applicable
	• Demonstrated ability to amend an existing reservation in nominated ways that comply with system and other imposed restrictions
	• Demonstrated ability to retrieve a nominated booking
	• Printing hard copy of designated system information, where applicable
	• Passing on reservation details to other nominated personnel/departments to facilitate and optimise internal response to the reservation
	• Demonstrated ability to produce and forward reservation confirmation and receipt for advanced payment, where appropriate.
	
	Context of Assessment
	Assessment must ensure:
	• Actual or simulated workplace application of the reservation system that is in use for the area/department that is the focus of the training.
	
	Resource Implications
	Training and assessment must include the use of an actual computerised or manual reservations system appropriate to the needs of the host enterprise, or as being used by the host enterprise in the area/department that is the focus of the training; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

Assessment Methods

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

- Observation of practical candidate performance
- Practical exercises that reflect the workplace use of the computerised or manual reservation system in use by the host enterprise
- 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	Use research skills to obtain product and service knowledge; identify and gather customer requirements; determine availability of required reservations
Communicating ideas and information	2	Speak with customer to determine needs, wants and preferences; speak with suppliers to obtain results that meet stated customer needs, wants and preferences
Planning and organising activities	1	Prioritise workload; forward planning

	Working with others and in teams	1	Cooperate with other departments/areas to maximise their sales through reservation options
	Using mathematical ideas and techniques	1	Advise anticipated and/or actual cost for the reservation that has been made; calculate cost elements of the reservation, such as tax, fees, charges, discounts and determine final cost of booking, where appropriate
	Solving problems	2	Assist customers to resolve issues relating to over-bookings, objections to buying, limited availability, and alternative sources for reservations
	Using technology	3	Enter and manipulate information and data within the computerised reservation system

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Receive and process reservations D1.HFO.CL2.01 D2.TTA.CL2.17
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Net Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. Explain how a manual reservation system differs from and a computerised reservation system.	❑	❑
2. Give me an example of five different types of bookings which may be processed using a reservation system.	❑	❑

Questions	Response	
	PC	NYC
3. Tell me three different ways reservations may be received.	❑	❑
4. Identify five different groups of people who may require reservations.	❑	❑
5. A customer has telephoned to make a reservation: how would you acknowledge this caller?	❑	❑

Questions	Response	
	PC	NYC
6. Before you can decide if you can accept a booking, what information do you need to obtain from the person requesting the reservation?	❑	❑
7. A vacancy exists for a person requesting a reservation but it is subject to a premium payment and minimum length stay: what does this mean?	❑	❑
8. You are unable to give a caller the double room they are they are seeking for a given date: what alternatives might be offered?	❑	❑

Questions	Response	
	PC	NYC
9. Give an example of how up-selling might be used when processing a guest booking.	❑	❑
10. A guest has asked a question about their room that you cannot answer: how would you respond to this situation?	❑	❑
11. What details about a reservation need to be recorded using a computer-based system?	❑	❑

Questions	Response	
	PC	NYC
12. Explain what is mean by ‘guest history’ identifying why and when it should be updated.	❑	❑
13. How might a guest booking be confirmed?	❑	❑
14. What is an ‘advanced deposit’ and why and when is one normally requested?	❑	❑

Questions	Response	
	PC	NYC
15. How might payment for a reservation be accepted when taking a telephone reservation?	❑	❑
16. How is a reservation filed in a paper-based/manual reservation system?	❑	❑
17. What documentation might a venue generate as a result of a reservation being accepted?	❑	❑

Questions	Response	
	PC	NYC
18. What changes might a person make to their reservation once it has been accepted?	❑	❑
19. Under what circumstances might a guest pay a fee/lose their deposit when cancelling a reservation?	❑	❑
20. Tell me what is involved in following up unconfirmed reservations.	❑	❑

Questions	Response	
	PC	NYC
21. A person with a reservation has called to extend their reservation by five days. You can accommodate this request/change. What documentation or fields would need to be updated as a result?	❑	❑
22. What internal venue staff may need to be notified in relation to reservations, and how might this occur?	❑	❑
23. What external organisations may need to be notified in relation to reservations, and why might there be a need to do so?	❑	❑

Written Questions

Receive and process reservations – D1.HFO.CL2.01 D2.TTA.CL2.17

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. List 3 advantages of a manual system.

____

____

____

2. List 3 advantages of a computerized system.

____

____

____

3. What is the most important factor when taking a reservation?

____

____

4. Describe 4 types of bookings that may be processed.

____

____

5. List 3 sub groups under accommodation suppliers.

____

____

6. How do reservations get to your establishment? (List 3 methods)

____

____

7. What is CRS?

____

____

8. What are the 2 types of customers who require reservations?

9. What are the characteristics of one of these travellers?

10. Write an appropriate morning greeting.

11. Why is it important to maintain eye contact?

12. What is the first question you will ask a person who is making a reservation?

13. What sort of questions do you need to ask for a hire car reservation?

14. Why is it important to advise the customer of availability of requested booking?

15. What alternatives can be offered to a guest if the request is not available?

16. Describe a method of selling technique.

17. What is meant by Add on's or extras?

18. What tool could you use to respond to questions asked by customers?

19. Why is it important to know your market?

20. Why is it important to have the arrival and departure date?

21. Why is it important to enter an arrival and departure date?

22. Which is more important when entering a reservation – the family name or the first name?

23. How would you spell out Wilson phonetically?

24. What is the equivalent time of 1700hrs using the am/pm method of expressing time?

25. Apart from arrival, departure date and guest name list 4 other pieces of information that is required to record a reservation?

26. Suggest a reason why we store guest history information.

27. Why is it essential to enter guest name details in a specific format for guest history?

28. Why is it important to confirm the reservation with the customer?

29. Name 2 relevant reservation issues.

30. Name 2 acceptable methods of payment for a reservation.

31. List 3 reservation related documents.

32. Record 3 reasons why a customer would need to change a reservation.

33. Record two instances when the reservations department would have to communicate details to others.

Answers to Written Questions

Receive and process reservations – D1.HFO.CL2.01 D2.TTA.CL2.17

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

1. List 3 advantages of a manual system.

- Cost of system is cheaper
- Works in smaller establishments
- Comply with risk management should you experience a power or equipment failure.

2. List 3 advantages of a computerized system.

- More accurate and reliable information
- Ability to store guest history data
- Less staff required
- Greater reporting ability
- Control costs
- Limited staff training
- Don’t have to manually check and recheck information.

3. What is the most important factor when taking a reservation?

Availability.

4. Describe 4 types of bookings that may be processed.

- Accommodation suppliers
- Aircraft
- Cruise ships
- Coaches or buses
- Limousines or hire cars
- Day/extended tours
- Dining and meal reservations
- Entertainment
- Tourist attractions
- Events.

5. List 3 sub groups under accommodation suppliers.

- Resorts
- Hotels
- Apartments
- Guest houses
- Caravan parks.

6. How do reservations get to your establishment? (List 3 methods)

- Telephone
- In person – face to face
- Mail
- Email
- Facsimile (fax)
- Internet – on line bookings
- Third party reservations – e.g. Wotif, AsiaRooms
- Central reservation service (CRS)
- Same chain referrals.

7. What is CRS?

A central reservation service that controls reservations for several venues.

8. What are the 2 types of customers who require reservations?

Business and leisure customers.

9. What are the characteristics of one of these travelers?

Business customers require accommodation and car bookings at short notice, they may use the establishment on a regular basis, or may be here for the sole purpose of attending a conference or convention in your city. Business travellers are the largest source of business for hotels and usually travel all year around except for holiday times.

Leisure customers arrival is seasonal and are attracted by special events and tourist attractions. They are generally more price sensitive and book attractions well ahead of their arrival dates.

10. Write an appropriate morning greeting.

Sales Agent: "Good morning reservations, this is Mei-Ling how can help you?"

11. Why is it important to maintain eye contact?

This shows respect to the person – let them know you are talking to them and that you are listening.

12. What is the first question you will ask a person who is making a reservation?

Dates – arrival and departure dates.

13. What sort of questions do you need to ask for a hire car reservation?

Where do you want to go? Why? Car size, 4 x 4 or sedan? Number of passengers? Luggage? Do you have a valid licence? Can you spell that?

14. Why is it important to advise the customer of availability of requested booking?

- The importance of checking availability – know the systems that are available and that are being used Must be able to check quickly and professionally
- Check arrival and departure dates – check for types of request e.g. room types, airline booking, rental car, tourist trip are available for the requested time
- Systems knowledge – be familiar with the computer or manual system you are using
- Offer alternatives to make a sale.

15. What alternatives can be offered to a guest if the request is not available?

- Offer an alternative date
- Apply selling techniques to sell a better or another product
- Offer to add the customer to a wait list
- Suggest another establishment within your group or in the area, similar to yours.

16. Describe a selling technique.

- Up-selling is a selling process to start at the lowest price then sell up to the next level and continue selling up the price levels to meet the customer needs
- Suggestive selling involves selling your products by offering alternatives. Describe how the product would meet the customer's needs, highlight any special features
- Down-selling is basically the opposite to up-selling whereby you start the selling process at the most expensive item and work down to the lowest price.

17. What is meant by Add on's or extras?

Extras and add-ons usually encourage customers to purchase additional products to the main product. This might assist the customers to make their reservations. For example, when a customer hires a car you might suggest an add on such as windscreen insurance, or a guest making a hotel booking offer to make a reservation in the restaurant for dinner.

18. What tool could you use to respond to questions asked by customers?

Know your product:

- Most importantly you will need to know the costs relating to your products
- Know the features and benefits of all your products

- Be able to differentiate between the various options that are available and explain this to your potential customers
- Put customers in contact with relevant internal specialists where they are available
- Research answers to potential questions you might receive from customers
- Generate a product knowledge booklet that is at easy reach to help with customer queries.

19. Why is it important to know your Market?

If you understand and know the characteristics of your various target markets you can use your selling techniques and promotional techniques to ensure you make the sale with your customer.

20. Why is it important to have the arrival and departure date?

This is the starting point of a reservation. This will determine the availability for the customer.

21. Why is it important to enter an arrival and departure date?

Whatever method is chosen by the establishment, it is essential that all staff are trained to be consistent and use the same method.

22. Which is more important when entering a reservation – the family name or the first name?

Family name.

23. How would you spell out Wilson phonetically?

Whiskey, India, Lima, Sierra, Oscar, November.

24. What is the equivalent time of 1700hrs using the am/pm method of expressing time?

5pm.

25. Apart from arrival, departure date and guest name list 4 other pieces of information that is required to record a reservation?

- Room type – or type of request
- Number of guest-adults/children
- Number of rooms
- Contact details
- Passport number
- Rate code
- Market segment
- Address

- Method of payment
- Special requests
- Details of who and when reservation was taken.

26. Suggest a reason why we store guest history information?

- This history data not only provides you with the personal details of their name and address but, can also store details of the products, services and facilities they used. This information can be used for marketing and promotions to help generate a financial benefit for the business and at the same time enhance levels of customer service
- Provide customer service.

27. Why is it essential to enter guest name details in a specific format for guest history?

- It is essential to have a standard format to enter guest names (always check the spelling) otherwise you will have several different history profiles for the same guest. For example:
  - Mr. Garry Collins, Mr. Gary Collins, Mr. G Collins, or Mr. Garry Colins.

28. Why is it important to confirm the reservation with the customer?

Once you have completed the reservations process you will need to make sure all the data is accurate and want the guest requires.

29. Name 2 relevant reservation issues.

- Transfer of information
- Arrival and departure times
- Payment
- Refunds and exchanges.

30. Name 2 acceptable methods of payment for a reservation.

- Credit card
- Voucher
- Company charge
- Cash/deposits.

31. List 3 reservation related documents.

- Receipts
- Invoices
- Vouchers
- Confirmation letters
- Information packs.

32. Record 3 reasons why a customer would need to change a reservation.

Change length of stay, alter flight details, alter time or dates, update customer contact, change billing information, add special requests, cancel a reservation

33. Record two instances when the reservations department would have to communicate details to others.

Recording payments	Update the customer reservation to include payment details	Process payment to the accounts department
Adjust records discounts	Alter the customers reservation to reflect the discount	Inform the accounts department of change to quoted rate
Apply cancellation fees	Cancel reservation and make a charge against the credit card or cash paid	Process the payment in accounts department
Apply refunds	Cancel the reservation and arrange to forward refund to customers	Accounts department send refund to customers
Computer system prompt – for example; PMS (properly management system) prompt that the credit card we have has reached its expiry date	Notify the customer and obtain the new credit card details- record into guest history profile	Reservations
Point of sale records store customers expenses	Expenses are added to the guest history profile to be used for sales and marketing activities	Sales and Marketing
Guest provides additional data on registration cards	Reception staff update the history profile by updating this information	Reception
A butler on a floor might notice that the customer constantly request a particular good or service – a butler on a floor might notice that you constantly request a particular good or service – e.g. every time you hire a car you want an adjustable steering wheel – this is then added to the guest history profile.	Updated onto guest history profile – added special request details.	Notify reception to update records

Guest History data	Guest history file is updated with the record of nights the guest has stayed at the property. Total amount spent at the property	This data is sent to Sales and Marketing for promotional activity

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Receive and process reservations D1.HFO.CL2.01 D2.TTA.CL2.17
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Describe the elements of the reservation system b) Respond to reservation requests c) Enter reservation details into system d) Maintain reservations e) Communicate reservation details to others 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1: Describe the elements of the reservation system		
Differentiate between a manual reservation system and a computerised reservation system	❑	❑
Describe the types of bookings that may be processed	❑	❑
Identify the ways in which reservations may be received	❑	❑
Differentiate between customers who may require reservations	❑	❑
Element 2: Respond to reservation requests		
Acknowledge customer who wishes to make a reservation	❑	❑
Identify required reservation details	❑	❑

Advise customer of availability of requested booking	❑	❑
Offer alternatives if requested booking is unavailable	❑	❑
Offer advice and information about available products, services and facilities	❑	❑
Respond to questions asked by customer	❑	❑
Element 3: Enter reservation details into system		
Record reservation details	❑	❑
Update and utilise existing customer history	❑	❑
Confirm booking details with customer on completion of data entry	❑	❑
Explain relevant reservation issues	❑	❑
Accept payment for reservation	❑	❑
File reservation	❑	❑
Generate reservation-related documentation	❑	❑
Element 4: Maintain reservations		
Amend existing reservations as required	❑	❑
Cancel reservations	❑	❑
Follow up unconfirmed reservations	❑	❑
Update internal records, documents and files as required	❑	❑
Element 5: Communicate reservation details to others		
Notify internal personnel, service areas and departments in relation to reservations	❑	❑
Notify external organisations in relation to reservations	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor			
Strengths:			
Improvements needed:			
General comments:			
Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		**Contact no**	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:*____ *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Receive and process reservations D1.HFO.CL2.01 D2.TTA.CL2.17		

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Differentiates between manual and computerised systems	❑	❑	❑
Distinguishes between booking types, the way reservations are received and those who require reservations	❑	❑	❑
Handles a request for reservation to determine if booking can be accepted	❑	❑	❑
Offers alternatives where reservation cannot be accommodated	❑	❑	❑
Processes and records reservations where booking can be accepted	❑	❑	❑
Updates reservations as required/requested by guest	❑	❑	❑
Communicates reservation details internally and externally as required	❑	❑	❑

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

Competency Recording Sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Receive and process reservations	D1.HFO.CL2.01 D2.TTA.CL2.17
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

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

Element and Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Describe the elements of the reservation system						
Differentiate between a manual reservation system and a computerised reservation system						
Describe the types of bookings that may be processed						
Identify the ways in which reservations may be received						
Differentiate between customers who may require reservations						
Element 2: Respond to reservation requests						
Acknowledge customer who wishes to make a reservation						
Identify required reservation details						
Advise customer of availability of requested booking						
Offer alternatives if requested booking is unavailable						
Offer advice and information about available products, services and facilities						
Respond to questions asked by customer						

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

Element and Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 3: Enter reservation details into system						
Record reservation details						
Update and utilise existing customer history						
Confirm booking details with customer on completion of data entry						
Explain relevant reservation issues						
Accept payment for reservation						
File reservation						
Generate reservation-related documentation						
Element 4: Maintain reservations						
Amend existing reservations as required						
Cancel reservations						
Follow up unconfirmed reservations						
Update internal records, documents and files as required						

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

Element and Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 5: Communicate reservation details to others						
Notify internal personnel, service areas and departments in relation to reservations						
Notify external organisations in relation to reservations						
Candidate signature:			**Date:**			
Assessor signature:			**Date:**			

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for foods, tourism
& hospitality

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Australian Aid