

Competency Standard

UNIT TITLE: MANAGE AND EXECUTE A DETAILED TOUR ITINERARY		NOMINAL HOURS: 80
UNIT NUMBER: D2.TTO.CL4.09		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to manage and execute a prepared and detailed tour itinerary that involves multiple products, services and sites: the unit addresses management practices that underpin the on tour activities of tour group leaders/guides and does not address the leading of a tour		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Prepare for tour itinerary</p> <p>1.1 Identify <i>the requirements in the itinerary</i></p> <p>1.2 Clarify <i>requirements</i> relating to the itinerary</p> <p>1.3 Plan <i>tour in accordance with briefing information</i></p> <p>1.4 Identify <i>tour-related risks</i></p> <p>1.5 Develop contingency plans for risks</p> <p>1.6 Confirm <i>reserved tour components</i></p> <p>Element 2: Conduct departure-related activities</p> <p>2.1 Greet <i>tour group members</i></p> <p>2.2 Complete <i>outstanding customer details</i></p> <p>2.3 Distribute <i>tour-related information</i></p> <p>2.4 Provide <i>tour briefing</i></p>	<p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment</p> <p>This unit applies to all industry sectors that provide detailed tour itineraries for customers within the labour divisions of the hotel and travel industries and may include:</p> <p>1. Tour Operation</p> <p><i>The requirements in the itinerary</i> may be related to:</p> <ul style="list-style-type: none"> • Inclusions • Dates and times • Destinations • Activities • Carriers • Suppliers and providers, including identification of specific products and/or services to be delivered 	

<p>2.5 Provide last-minute confirmations, payments and booking details to suppliers, providers and carriers</p> <p>Element 3: Brief tour staff</p> <p>3.1 <i>Provide tour details to tour staff</i></p> <p>3.2 <i>Provide resources to support tour</i></p> <p>Element 4: Liaise with external industry colleagues throughout the tour</p> <p>4.1 <i>Liaise with industry personnel to facilitate tour implementation</i></p> <p>4.2 <i>Request assistance, where appropriate</i></p> <p>4.3 <i>Make on tour agreements with organisations to respond to issues arising</i></p> <p>Element 5: Manage on tour itinerary</p> <p>5.1 <i>Facilitate conduct of the tour schedule</i></p> <p>5.2 <i>Advise tour staff regarding issues arising</i></p> <p>5.3 <i>Re-plan itinerary as required</i></p> <p>5.4 <i>Maintain contact with those responsible for resolving on tour issues</i></p> <p>5.5 <i>Advise industry colleagues regarding tour changes</i></p> <p>5.6 <i>Maintain regular contact with tour group</i></p> <p>5.7 <i>Monitor the tour area</i></p> <p>Element 6: Deal with unexpected events</p> <p>6.1 <i>Initiate contingency planning actions</i></p>	<ul style="list-style-type: none"> • Booking details, including customer contact details • Payment for the tour • Recent changes made to advertised activities, destinations and experiences. <p><i>Clarify requirements will include:</i></p> <ul style="list-style-type: none"> • Verifying that payments and deposits have been paid in accordance with organisational policies/terms and conditions • Obtaining final decisions from customers regarding their preferences for available options • Following-up with potential customers who have failed to confirm and/or pay for their tour. <p><i>Plan tour in accordance with briefing information will include confirming existing arrangements with suppliers, providers and carriers and may be related to:</i></p> <ul style="list-style-type: none"> • Sourcing and establishing a business relationship with suppliers, providers and carriers to accommodate service provision where no existing relationship exists • Advising existing suppliers, providers and carriers • Seeking input and information from existing and potential suppliers, providers and carriers • Liaising with handling agents to identify relevant information • Making bookings • Confirming access to and availability of inclusions • Ensuring integration of activities, destinations and carriers • Allowing for and meeting promises made in the promotion for the tour • Aligning with specific customer requests • Generating alternatives for options and expectations that cannot be accommodated • Making arrangements to cater for individual customer needs and preferences.
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<p>6.2 <i>Support tour group leaders/guides</i></p> <p>6.3 <i>Research and suggest additional action to be taken</i></p> <p>6.4 <i>Make arrangements in response to identified emergencies</i></p> <p>6.5 <i>Handle media interest</i></p> <p>6.6 <i>Amend tour itinerary as required</i></p> <p>Element 7: Finalise tour</p> <p>7.1 <i>Solicit feedback from tour group members</i></p> <p>7.2 <i>Solicit feedback from suppliers, providers and carriers</i></p> <p>7.3 <i>Debrief tour staff</i></p> <p>7.4 <i>Prepare tour report</i></p> <p>7.5 <i>Share information with suppliers, providers and carriers</i></p> <p>7.6 <i>Archive information for future reference</i></p>	<p><i>Tour-related risks</i> may include:</p> <ul style="list-style-type: none"> • Weather and seasonal factors • Environmental conditions, including natural and built environment, and issues relating to minimal impact operations, sustainability and responsible tourism as well as impact of natural and other emergencies • Political factors, including aspects impacting on safety and security of persons and property • Transport and access issues, including mode of transport, duration of tour, permits and authorities • Infrastructure, including on tour availability of medical assistance, police services, food and beverages, accommodation, industry support, advice from government agencies • Specific risks presented by individual tour group members, including health and fitness, mobility, disability, language, cultural issues, food allergies • Activities to be undertaken as part of the tour experience • Instances where there is a tight timing schedule • Potential service delivery difficulties. <p><i>Confirm reserved tour components</i> may include:</p> <ul style="list-style-type: none"> • Providing names to identified suppliers, providers and carriers with whom commercial arrangements already exist • Providing and/or validating booking numbers • Identifying relevant tour group member details, including age, gender, level of fitness, weight, expectations, previous history/experience and other relevant factors, as appropriate • Obtaining hard copy confirmations for all bookings placed • Making payment/advance deposits for relevant bookings
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- Obtaining necessary tickets and vouchers from suppliers, providers and carriers
- Updating customer files and tour file to reflect bookings
- Obtaining and recording relevant contact details of key personnel from suppliers, providers and carriers involved in service delivery for the tour
- Determining procedures at each booking/venue, including check-in procedures, obtaining keys, parking, assembly and meeting points, information to be distributed to tour group members prior to arrival, processes to be used by tour group leader/guide.

Greet tour group members may include:

- Welcoming people
- Encouraging feelings of goodwill
- Building rapport with and between tour group members
- Employing appropriate interpersonal skills.

Outstanding customer details may relate to:

- Obtaining payment
- Issuing receipts
- Clarifying spelling of names
- Confirming the options that tour group members have chosen from the alternatives available in a package
- Checking travel documentation where prior concern existed
- Issuing travel bags, luggage and other items to customers who could not be earlier supplied
- Up-dating files and documents as required on the basis of action taken, payment received, options chosen and other issues.

Tour-related information may include hard copy relating to:

- Maps and set of tourism information brochures and leaflets
- Details of transfers from terminals to accommodation and other venues
- Details and arrangements regarding sight-seeing tours and side-trips that are included as part of tour
- Information explaining local times, currency, exchange rates and facilities
- Advice and information on tipping, destinations, attractions, sites and activities
- Rules of the tour, including behaviour at destinations and sites, communication procedures and protocols whilst on tour, conflict dispute procedures, need for tour group members to exercise respect and consideration for others
- Copies of relevant travel documentation appropriate to the type of tour and individual tour group member purchases and options selected
- Vouchers and tickets, where appropriate: these may be distributed by the tour group leader/guide throughout the tour, prior to immediate use
- Options for free time activities.

Provide tour briefing may include:

- Talking through and explaining the itinerary
- Answering questions and responding to concerns
- Providing personal anecdotal information regarding the tour, including providing examples to illustrate points
- Detailing inclusions and explaining options
- Explaining the rules that will operate whilst on the tour
- Creating a positive experience
- Building expectations amongst tour group members

- Introducing tour group members to each other
- Facilitating group interaction.

Provide tour details to tour staff may include:

- Explaining itinerary, including emphasis on transfers, connections, suppliers, providers and carriers and the arrangements that have negotiated with each in relation to the tour
- Identifying tour group members, including general customer profiles, previous history and experiences, specific needs, customers identified as potential problem customers, sharing any expectations that are known
- Identifying risks that have been identified for the tour, including communication of contingency planning arrangements
- Confirming details regarding destinations, attractions and sites to be visited, including identifying changed circumstances that have been identified as existing
- Confirming, explaining and clarifying options and inclusions
- Identifying documentation that needs to be completed while on tour
- Identifying documentation that needs to be captured whilst on tour and returned to the host enterprise, including receipts, invoices, credit card vouchers, charge forms.

Resources to support tour may include:

- Travel documentation, including documentation for staff and documentation for tour group members
- Vouchers and tickets
- Cash and credit cards
- Letters of authority
- Copies of permits, licenses and authorisations to enable the trip and allow entry to countries, sites and destinations

- Contact details of support organisations in countries and regions to be visited, including provision of telephone
- Maps, schedules and time tables
- Medical details of tour group members
- Special requests made by tour group members
- Vehicles and supplies, as required.

Liaise with industry personnel to facilitate tour implementation may include:

- Making enquiries in response to requests from tour group leaders/guides
- Making forward confirmations
- Making forward bookings
- Notifying changes of tour numbers, dates, times, special requests, durations
- Actioning requests
- Forwarding documentation and information
- Clarifying information supplied.

Request assistance may include:

- Seeking information
- Negotiating changes to requirements
- Seeking advice, recommendations and suggestions.

Make on tour agreements may include:

- Re-negotiating existing contractual arrangements
- Establishing new contractual arrangements with existing and new suppliers, providers and carriers
- Making payments

- Arranging to use staff from a third party as part of the tour group leadership/guide team
- Arranging transport
- Booking optional tour activities
- Responding to emergency events.

Facilitate conduct of the tour schedule may include:

- Providing office-based assistance to tour group leaders/guides to optimise:
 - Inclusion of all features
 - Adherence to schedules
 - Customer enjoyment of the tour
 - The relationship between the host enterprise and suppliers, providers and carriers
 - Resolution of complaints, problems and issues arising
- Acting on behalf of tour group leaders/guides
- Supplying requested information, including destination information, contact names and numbers, suppliers/providers to assist in emergency situations
- Making payments on behalf of the tour to enable required action to occur.

Advise tour staff may include:

- Notifying tour staff regarding information updates
- Informing staff of potential hazards arising, including changes to the general environment and specific issues
- Providing details of bookings made
- Passing on information received as a result of specific research
- Providing briefing information that tour group leaders/guides can pass on to group members regarding changes that have been made.

Re-plan itinerary may include:

- Responding to issues arising
- Ensuring inclusions can be accommodated to the greatest extent possible and providing acceptable alternatives for inclusions that have to be modified or cancelled
- Determining gratuities and/or options that may be offered in compensation for inclusions that cannot be accommodated
- Complying with company policies and procedures in relation to fair trading, including alignment with relevant codes of practice, and applicable terms and conditions
- Preparing and forwarding hard copy of revised itineraries
- Re-booking services and products in accordance with revised plans/itineraries
- Notifying tour group leaders/guides in relation to confirmation of revised arrangements and bookings
- Determining costs associated with required changes
- Determining if tour group members can be legitimately charged for revised requirements, ensuring compliance with terms and conditions and relevant fair trading legislation of the host country
- Minimising disruption to tour group members to the greatest extent possible, given the nature of the need for change
- Apologising to tour group members.

Maintain contact with those responsible for resolving on tour issues may include:

- Checking on progress
- Providing supplementary information as required
- Paying for services rendered, including deposits, initial payments, progress payments and final payments

- Engaging in ongoing negotiations as relevant information becomes clearer and more abundant
 - Emphasising the urgency of the situation to suppliers and other relevant contacts
 - Handling language problems relating to services required
 - Acting as the central contact point for tours that are out of regular/normal contact.
- Advise industry colleagues regarding tour changes* may include:
- Notifying destinations, attractions, sites and destinations of delays
 - Revising expected visitor numbers as appropriate.
- Maintain regular contact* may include:
- Identifying method of contact
 - Providing contact names, numbers and special requests/requirements
 - Establishing contact schedule, including accommodating different time zones.
- Monitor the tour area* may include:
- Actively monitoring the regions, countries, areas, destinations scheduled on the itinerary to identify potential problems and risks
 - Maintaining contact with industry colleagues.
- Initiate contingency planning actions* may include:
- Identifying contingency plans to be implemented
 - Checking the applicability of the contingency plans in response to identified actual situations
 - Suggesting modifications to existing contingency plans to meet current identified need
 - Arranging for relevant external third party support
 - Authorising actions.

Support tour group leaders/guides may include:

- Providing suggestions
- Being available for discussions
- Sending a host enterprise representative to join the tour in the emergency situation
- Providing necessary resources
- Maintaining contacts with relevant persons and organisations to relieve the workload on the tour group leaders/guides
- Liaising with emergency services and government agencies
- Authorising extensions to standing levels of authority and scopes of authority
- Lifting spending limits, where appropriate, to enable appropriate response to emergency conditions.

Research and suggest additional action to be taken may include:

- Undertaking desktop research and passing on information identified
- Contacting relevant authorities and service providers
- Seeking input from other industry bodies
- Seeking input from relevant internal and external personnel, focusing on those with similar experiences in the same/similar locations, destinations and circumstances
- Analysing options
- Using a customer-focused orientation to make decisions, as opposed to basing decisions on a strictly financial basis
- Seeking situational updates from tour group leaders/guides and other relevant parties, including handling agents, government agencies, emergency services, peak industry bodies in other countries/regions.

Make arrangements in response to identified emergencies may include:

- Changing bookings
- Confirming changed circumstances
- Making ancillary and other payments
- Revising itinerary
- Cancelling tour
- Making arrangements to repatriate tour group
- Contacting families of tour group members to provide information, updates and reassurances.

Handle media interest may include:

- Developing media releases
- Conducting media interviews and making media statements
- Responding to media interest and questions
- Ensuring all host enterprise comment is routed through a nominated individual
- Ensuring prompt attention to media interest ensuring truth, accuracy and full disclosure to media.

Feedback from tour group members may include:

- Verbal
- Written
- Individual or group-based
- Structured feedback using questionnaires.

Feedback from suppliers, providers and carriers should relate to:

- Their level of satisfaction with arrangements
- Their level of satisfaction with spending and/or commercially-related issues
- Identifying problems with the tour and/or certain tour group members, including behaviour
- Maintaining existing positive relationships
- Seeking to improve the relationships to optimise the likelihood of win-win arrangements.

Debrief tour staff may include:

- Describing problems encountered
- Explaining action taken in response to issues arising
- Identifying products and/or services that may be used for inclusions in future tours
- Describing the standards and quality of services and/or products supplied by suppliers, providers and/or carriers
- Identifying changes that may be required to established policies and procedures, terms and conditions, options, current tour structure, including times, dates, destinations, activities, attractions and similar other issues.

Share information with suppliers, providers and carriers may include:

- Providing qualitative and quantitative information identified from customers and others in order to optimise mutual business interests.

Assessment Guide

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

- Enterprise policies and procedures in regard to conduct of tours, relationships with businesses and external organisations, emergency planning and responses, media, customer service, tour terms and conditions, and all other house policies relevant to executing tours

- Knowledge of the tourism industry, supplier networks and interrelationships that impact on the conduct of multi-product and multi-site tours
- Knowledge of industry confirmation and booking procedures
- Knowledge of legal and liability issues affecting tours, specifically in relation to nominated domestic and international tours
- Knowledge of and ability to apply tour planning and management processes to be undertaken before, during and on completion of tours
- Principles of risk management in relation to nominated tours
- Knowledge of and the ability to respond effectively to typical tour management problems
- Manage operational risk
- Monitor tourism operations
- Build and maintain a team approach to service delivery.

Linkages To Other Units

- Communicate on the telephone
- Manage and resolve conflict situations
- Receive and resolve customer complaints
- Establish and maintain a business relationship
- Produce documents, reports and worksheets on a computer
- Manage and implement small projects
- Plan and establish systems and procedures
- Develop and implement operational policies
- Manage legal requirements for business compliance
- Lead and manage people

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| | <ul style="list-style-type: none">• Provide professional support to business colleagues• Develop and update tourism industry knowledge• Operate a computerised reservation system• Follow safety and security procedures• Access and interpret product information• Operate an automated information system• Source and package tourism products and services• Source and provide destination information and advice• Work as a tour guide• Allocate tour resources• Conduct pre-departure checks• Coordinate and operate a day-tour (or short excursions)• Conduct interpretive activities in the field• Establish and maintain safe touring conditions• Lead tour groups in a responsible manner• Maintain contacts with handling agents• Manage and facilitate an extended tour experience• Provide arrival and departure assistance. |
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Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures in regard to conduct of tours, relationships with businesses and external organisations, emergency planning and responses, media, customer service, tour terms and conditions, and all other house policies relevant to executing tours
- Demonstrated ability to manage and execute a nominated real or simulated detailed tour itinerary, including:
 - Identifying, and providing evidence of undertaking, pre-tour preparations necessary to successfully manage the tour
 - Identifying and providing evidence of engaging in necessary departure-related activities for tour group members and internal and external staff
 - Identifying external industry bodies, organisations and personnel with whom it would be necessary to maintain contact during the tour, explaining the potential need to retain such contact
 - Describing the on tour management activities that need to be undertaken to keep the tour on schedule and optimise the chance of the identified itinerary being attained as stated
 - Creating a comprehensive and effective set of responses to a simulated or real on tour emergency or other nominated serious problem which must include a revision to established plans and/or itineraries
 - Identifying, and providing evidence of undertaking, post tour activities necessary to successfully finalise the tour.

Context of Assessment

This unit may be assessed on or off the job

- Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility.

Resource Implications

Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tour itineraries, tools and equipment.

Assessment Methods

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

- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Analysis of portfolio of evidence developed by the candidate including plans, itineraries, revised itineraries, copies of communications with suppliers, providers and carriers, samples of feedback received/obtained, reports and input from other parties
- Problem solving involving generating responses to problems and emergencies
- Role plays involving interaction with customers and/or staff at briefings and debriefings
- Third party reports completed by a supervisor
- Project and assignment work.

<p>Key Competencies in this Unit</p> <p><i>Level 1 = competence to undertake tasks effectively</i></p> <p><i>Level 2 = competence to manage tasks</i></p> <p><i>Level 3 = competence to use concepts for evaluating</i></p>		
Key Competencies	Level	Examples
Collecting, organising and analysing information	3	Determine information from various internal and external sources relevant to the conduct of a nominated tour
Communicating ideas and information	3	Communicate tour-related details to tour staff and tour group members
Planning and organising activities	3	Develop contingency plans
Working with others and in teams	3	Liaise with external suppliers, providers and carriers to provide and/or obtain specific tour-related information
Using mathematical ideas and techniques	3	Calculate times and costs relating to nominated tour issues
Solving problems	3	Resolve needs to amend itineraries
Using technology	3	Use management software to plan and monitor tour activities, expenses and feedback