

Competency Standard

UNIT TITLE: SOURCE AND PACKAGE TOURISM PRODUCTS AND SERVICES		NOMINAL HOURS: 70
UNIT NUMBER: D2.TCS.CL5.22 D2.TTA.CL2.18		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to source and evaluate products and services for inclusion into packages for sale to individual and/or generic groups of clients.		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Describe the context for packages</p> <p>1.1 Identify the <i>clients for packages</i></p> <p>1.2 Identify <i>client requirements</i> in relation to packages</p> <p>1.3 Identify <i>host enterprise requirements</i> in relation to packages</p> <p>1.4 Identify <i>purposes of packages</i></p> <p>1.5 Identify <i>products and services</i> for inclusion in packages</p> <p>Element 2: Source products and services for packages</p> <p>2.1 Identify <i>sources of information</i> for products and services</p> <p>2.2 <i>Research information sources</i> to obtain targeted information</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 sourcing and evaluating products and services for inclusion in packages for sale to individual and/or generic groups of clients within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> 1. Travel Agencies 2. Tour Operation <p><i>Clients for packages</i> may include:</p> <ul style="list-style-type: none"> • Individuals and groups, including one-off clients and identified target market sectors • Day tour operators • Hotels • Outbound tour wholesalers • Inbound tour operators • Conference organisers. 	

<p>2.3 <i>Assess applicability of identified products and services to proposed packages</i></p> <p>2.4 <i>Select products and services for the package</i></p> <p>Element 3: Create packages of products and services</p> <p>3.1 <i>Identify pre-planning requirements for packages</i></p> <p>3.2 <i>Determine components of individual packages</i></p> <p>3.3 <i>Determine duration for packages</i></p> <p>3.4 <i>Calculate price points for packages</i></p> <p>3.5 <i>Develop terms and conditions for the packages</i></p> <p>3.6 <i>Prepare draft itinerary for packages</i></p> <p>3.7 <i>Prepare sales monitoring arrangements for packages</i></p> <p>3.8 <i>Plan marketing activities for packages</i></p>	<p><i>Client requirements</i> must focus on identified client needs, wants and preferences and will include:</p> <ul style="list-style-type: none"> • Destination preferences • Budget • Timing and duration issues, including constraints and the need for integration with an associated tour or travel program • Cultural and religious issues • Product and service preferences • Practicality • Service styles and standards • Identified focus for undertaking the trip. <p><i>Host enterprise requirements</i> may be related to:</p> <ul style="list-style-type: none"> • Enhancing and expanding product range including product initiatives that conform to business plan and marketing objectives • Profitability • Movement into new target markets • Reputation and image • Business agreements, including franchise and other contractual arrangements • Meeting competition • Involvement of colleagues in determining requirements. <p><i>Purposes of packages</i> may include:</p> <ul style="list-style-type: none"> • Conferences • Social events • Holidays and recreation
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- Tour programs including day tours, extended tours, eco-tours, cultural tours and educational tours

- Special interest itineraries

- Incentives

- Series tours.

Products and services may relate to supplier, intermediary and/or touring packages promoted in brochures and include:

- Accommodation including serviced and non-serviced options

- Transport including air, rail, bus/coach and shipping

- Hire car including long and short-term rentals

- Attractions including natural and man-made

- Tours including side trips, one-day and extended tours

- Catering including bona fide meals and refreshments

- Entertainment including recreational, arts, sports, cultural, music, festivals, and special events

- Conference facilities

- Specialist services including guides, interpreters, secretarial support, child-minding and security.

Sources of information may include:

- Suppliers, carriers and providers, including those in distribution networks

- Local tourism information centres

- Embassies in identified locations/destinations

- Local operators including accommodation properties, tours, venues, restaurants and souvenir shops

- Tourism authorities including regional, domestic and international
- Industry associations including industry peak bodies and government authorities and agencies
- General literature including trade press, guide books, holiday and destination publications
- Internet
- Media
- Personal visits to destinations and site inspections of attractions, venues and facilities.

Research information sources may include:

- Undertaking desktop research including internet research and analysis of internal data contained on in-house systems
- Analysing existing secondary data including:
 - Domestic and international visitor statistics on departures, expenditure, visitor nights
 - Visitor profiles including tourist origins, volume, purpose of trip, seasonality, accommodation, transport and expenditure
 - Industry and government research reports on industry trends, current development activity and forecasts of future developments
 - Client feedback
 - Feasibility studies for new developments or products
 - Responses to surveys, questionnaires on preferences, needs and current tourist activities
- Conducting formal qualitative and quantitative market research including focus groups, surveys and questionnaires to generate primary research data
- Considering recent and emerging trends
- Using personal network of contacts

- Visiting providers, carriers and suppliers
- Undertaking personal observation
- Soliciting feedback from clients.

Assess applicability of identified products and services may relate to:

- Determining rates, costs, fees, charges, taxes for each package component
- Evaluating availability on a short-term and on-going basis, as required by the nature of the package
- Calculating return on investment, including consideration of loss leader implications
- Assessing compatibility with company image and reputation
- Verifying reputation of products and services, including assessment of client perceptions in relation to potential carriers, suppliers, destinations, products and services
- Identifying features and benefits, including comparisons with similar packages offered by competitors
- Checking match between products/services and identified objectives and client demand/requests for the package
- Determining destination characteristics, including accessibility and transport, accommodation and attractions, facilities, seasonal influences, degree of infrastructure, government regulations, special events, supporting venues and human resource potential to deliver required services, promotional potential, existing promotional material, retail outlets and ancillary support services
- Legal considerations
- Cultural sensitivity.

Select products and services may include:

- Aligning with identified objectives
- Complying with client requirements

- Ensuring availability
- Negotiating agreements with suppliers, carriers and providers – including obtaining written confirmation
- Ensuring value and potential saleability.

Pre-planning requirements may relate to:

- Seasonal influences
- Dates of one-off events
- Client demand
- Position of other packages in terms of product life-cycle
- Activities being undertaken by the competition.

Components refers to the products and services for individual packages and will relate to:

- Inclusion
- Exclusions
- Add-ons
- Available options, including substitutions and alternatives, where applicable.

Determine duration for packages may include:

- Formulating packages to accommodate differing timelines in order to meet identified client need
- Adding and removing inclusions to enable attainment of required duration while still delivering value and enabling saleability of package.
- Complying with agreed arrangements with suppliers, providers and carriers.

Calculate price points may include:

- Analysing prices offered by competition
- Determining target market affordability

- Ensuring required profit to host enterprise
- Identifying what the market will bear
- Developing price schedules, including special rates and discounts
- Determining host enterprise costs pertaining to package development and delivery
- Factoring in commissions.

Terms and conditions may relate to:

- Deposits and full/final payments
- Fees and charges, including penalties, terms of payment and timelines for payment
- Commissions due or payable
- Cancellations and alterations, including timelines and charges
- Limitation of liability
- Guarantees and warranties
- Complaint handling.

Draft itinerary may include:

- Day destinations
- Times
- Destinations
- Attractions, tours and sight-seeing
- Arranged activities
- Accommodation
- Transport
- Transfers.

Prepare sales monitoring arrangements may include:

- Establishing facilities to record enquiries in relation to packages
- Establishing internal systems to record package sales, including location of sale, seller, commissions and options selected
- Arranging for sales data to be forwarded from related businesses.

Plan marketing activities may include:

- Organising the launch of the packages
- Preparation of point-of-sales advertising material
- Organising media promotions, including advertisements, events and competitions
- Training sales staff in relation to the packages
- Designing client feedback tools.

Assessment Guide

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

- Enterprise policies and procedures in regard to developing packages and entering into agreements with suppliers, providers and carriers including the use of preferred suppliers/providers
- Packaging rules as appropriate to the host enterprise and the requirements of allied organisations
- Ability to use research, negotiation and analytical techniques
- Domestic and international rules, regulations, legislation and practices that apply to package formulation
- General industry knowledge of destinations, transport options, accommodation and potential for package-related inclusions suitable for a range of package types.

Linkages To Other Units

- Access and retrieve computer-based data
- Maintain hospitality industry knowledge
- Establish and maintain a business relationship
- Develop a marketing strategy and coordinate sales activities
- Develop new products and services
- Gather and present product information
- Use common business tools and technology
- Access and interpret product information
- Maintain product information inventory
- Source and provide destination information and advice
- Maintain contacts with handling agents
- Construct and apply tourism product research
- Co-ordinate production of brochures and marketing materials
- Prepare and submit quotations
- Manage and monitor innovative tourism programs and projects
- Source and present information.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of rules, regulations, legislation, policies and procedures applicable to package development within the host enterprise
- Demonstrated ability to source inclusions for a nominated package type to meet identified needs of a selected target group or individual

- Demonstrated ability to create and cost a saleable package to meet identified needs of a selected target group or individual
- Demonstrated ability to produce a set of appropriate and cost-effective marketing strategies to support the introduction and on-going sale of a nominated package.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace application of techniques, strategies and procedures to enable the sourcing of product and service information to enable the development of saleable packages.

Resource Implications

Training and assessment must include the use of real sources of information and systems, both internal and external, including the presence of relevant marketing research information to source products and services that will enable the development of packages to support the operation of the host enterprise; 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
- Project to develop nominated package
- Portfolio of research documentation obtained as part of research and sourcing activities
- Hard copy description, including itinerary, for a nominated package
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit		
<i>Level 1 = competence to undertake tasks effectively</i>		
<i>Level 2 = competence to manage tasks</i>		
<i>Level 3 = competence to use concepts for evaluating</i>		
Key Competencies	Level	Examples
Collecting, organising and analysing information	3	Capture and evaluate material for potential inclusion in a package
Communicating ideas and information	2	Develop supporting informational and promotional material for a package
Planning and organising activities	3	Design package; organise arrangements with suppliers, carriers and providers
Working with others and in teams	2	Liaise with colleagues, suppliers, carriers and providers to develop package
Using mathematical ideas and techniques	1	Calculate costs and price schedules
Solving problems	2	Source replacement inclusions and alternate options for package
Using technology	1	Use the internet, computerised reservation and automated information systems