Tourism
Curriculum Framework
Stage 6 Syllabus

Part B

for implementation from 2003

Tourism  (120 indicative hours)
Tourism  (240 indicative hours)
Tourism Extension (60 or 120 indicative hours)

2002
Acknowledgement

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The Tourism Curriculum Framework

The Tourism Curriculum Framework has been developed to provide students with the opportunity to gain credit towards the NSW Higher School Certificate and credit towards national vocational qualifications in Tourism under the Australian Qualifications Framework. The framework is based on the national Tourism Training Package (THT02).

This industry curriculum framework incorporates all Higher School Certificate Tourism VET courses including:
- courses delivered by schools
- courses delivered by TAFE colleges
- courses delivered by other Registered Training Organisations on behalf of schools or TAFE colleges.

This document, Part B of the Tourism Curriculum Framework Stage 6 Syllabus, contains the text of the units of competency from the Tourism Training Package. Each unit of competency is accompanied by HSC Requirements and Advice. The HSC requirements and advice column indicates the depth of study required for purposes of the HSC. The terms, concepts and content contained in this column must be included in programming and delivery for the HSC.

Tourism Curriculum Framework Documentation

- Syllabus Part A: Course Structures and Requirements
- Syllabus Part B: Units of Competency and HSC Requirements
- Competency Record Book
- Support Document
- Specimen HSC Examination Paper
- Sample Marking Guidelines
- Draft Performance Bands
Tourism Curriculum Framework – Units of Competency Contained in Part B

This document contains the following units of competency together with HSC Requirements and Advice for each unit. The HSC requirements and advice column indicates the depth of study required for purposes of the HSC. The terms, concepts and content contained in this column must be included in programming and delivery for the HSC.

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<td>25</td>
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<td>THHGCS03B</td>
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<td>THTSOP15B</td>
<td>Process and monitor event registrations</td>
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<td>THTTFME01B</td>
<td>Coordinate guest and delegate registrations at venues</td>
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<td>THTTFME03A</td>
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<td>THTSOP06B</td>
<td>Receive and process reservations</td>
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<td>Provide on-site information and assistance</td>
<td>10</td>
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<tr>
<td>THTFTG07B</td>
<td>Research and share general information on Australian Indigenous cultures</td>
<td>15</td>
<td>145</td>
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The **Key to Units** explains the purpose of each part of the layout for the units.

For information on extension course units, which are not included in Part B of this syllabus, please consult the Board of Studies website www.boardofstudies.nsw.edu.au or the Tourism Training Package.
### Key to Units

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<th>Hospitality (THH02)</th>
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<tr>
<td><strong>Title:</strong></td>
<td><strong>Work in a socially diverse environment</strong></td>
</tr>
<tr>
<td><strong>Unit Code:</strong></td>
<td><strong>THHCOR02B</strong></td>
</tr>
</tbody>
</table>

This unit deals with the cultural awareness that is required by all people working in the tourism and hospitality industries. It includes the cultural awareness required for serving customers and working with colleagues from diverse backgrounds.

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### Essential Knowledge and Skills to be Assessed

- **principles that underpin cultural awareness**
- **characteristics of the different cultural groups in Australian society**
- **basic knowledge of the cultures of Australia’s indigenous and non-indigenous peoples**
- **identification of various international appropriate individual**
- **principles of Equal Employment Opportunity (EEO) and anti-discrimination legislation as they apply to individual employees.**

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### Critical Aspects of Assessment

- Evidence of the following is critical:
  - cultural understanding and sensitivity in responding to different types of customers
  - ability to identify and respond to the cultural context of the workplace
  - ability to apply knowledge of different cultures and cultural characteristics to communication with colleagues

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### Context of Assessment and Resource Implications

- **Assessment must ensure:***
  - project or work activities that allow the candidate to demonstrate knowledge and awareness of diversity issues in the workplace.

### Assessment Methods

- Assessment methods must be chosen to ensure that candidates are able to respond constructively to issues which arise in a culturally and socially diverse workplace. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit:
  - **observation of the candidate interacting with colleagues and customers from diverse backgrounds**
  - **case studies or projects to consider particular conflict situations arising from diversity and to suggest appropriate means of dealing with them**
  - **questions about effective communication, problem-solving techniques and cultural values and differences**
  - **review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.**

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### Linkages with Other Units

This unit must be assessed with or after the following unit. These units describe skills and knowledge that are essential to this unit of competence. Continued training and assessment in this unit is recommended:

- **THHGC02B** Promote products and services to customers
- **THHGC03B** Deal with conflict

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### Key Terms and Concepts

- **anti-discrimination**
- **Anti-discrimination Act (1977) (NSW)**
- **attitudes**
- **barriers to communication**
- **beliefs**
- **cultural diversity**
- **cultural mores**
- **cultural sensitivity**
- **customs**
- **effective communication**
- **empathy**
- **ethnocentrism**
- **gestures**
- **internal and external customers**
- **Racial Discrimination Act (1975) (Cth)**
- **sources of information**
- **stereotyping**
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
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</thead>
</table>
| 1       | Communicate with customers and colleagues from diverse backgrounds | 1.1 Value customers and colleagues from different cultural groups and treat them with respect and sensitivity. | This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. Cultural differences may arise from:  
- race  
- language  
- special needs  
- disabilities  
- family structure  
- gender  
- age  
- sexual preference. | Learning experiences for the HSC must address:  
- An appreciation of how cultural diversity contributes to differing values, beliefs, attitudes and customs.  
- An understanding of:  
  - the significance of cultural values and mores  
  - cultural diversity in the Australian population  
  - cultural diversity of local and international customers  
- Knowledge of cultural expectations of major international tourist markets into Australia including:  
  - Asia  
  - Japan  
  - Korea  
  - Europe  
  - America  
  - United Kingdom  
  - New Zealand  
- Elements of cultural diversity including:  
  - interpersonal relations  
  - festivals/celebrations  
  - language  
  - food preferences and dietary needs  
  - religion  
  - customs  
  - different work ethic  
  - communication  
- Knowledge of religions including:  
  - Islam  
  - Hinduism  
  - Sikhism  
  - Buddhism  
  - Judaism  
  - Christianity  
- An understanding of the need for tolerance and respect within the workplace. |

**Date of release for the HSC**: November 2002

**Indicates the curriculum framework to which the unit of competency belongs**: Tourism Curriculum Framework

**Indicates the depth of study required for purposes of the HSC for the corresponding performance criteria**

**Describes the outcomes that make up a unit of competency**

**Specifies the required level of performance. Provides a basis for training and assessment for each element and the unit as a whole**

**The range statement provides advice on how to interpret the scope and context of this unit of competence, allowing for the differences between enterprises and workplaces**
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<tr>
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<td>Work with colleagues and customers</td>
<td></td>
</tr>
<tr>
<td>Unit Code</td>
<td>THHCOR01B</td>
<td>HSC Indicative Hours: 10</td>
</tr>
</tbody>
</table>

## HSC Requirements and Advice

### THHCOR01B

This unit deals with the interpersonal, communication and customer service skills required by all people working in the tourism and hospitality industries. This is a core unit which underpins all other competencies dealing with colleagues and customers and applies to all levels and sectors of the industry.

### Essential Knowledge and Skills to be Assessed

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

- **Effective communication techniques in relation to:**
  - Listening
  - Questioning
  - Non-verbal communication
- **Basic written communication skills eg messages, notes, emails, fax**
- **Identifying and responding to different cultural, language and special needs**
- **Teamwork principles**
- **Identifying and dealing with conflict situations and misunderstandings**
- **Customer service skills including meeting customer requirements, handling customer complaints and requests, developing rapport and promoting suitable products and services**
- **Ethics of professional hospitality and tourism behaviour**
- **Characteristics of different types of communication media**

### Critical Aspects of Assessment

Evidence of the following is critical:

- Ability to communicate effectively with customers and colleagues (including those with special needs) within the range of situations required for the relevant job role
- Ability to work in a team
- Ability to respond effectively to a range of different customer service situations
- Understanding of communication and customer service and its importance in a tourism/hospitality context.

The focus of this unit will vary depending upon the cultural context of the workplace. Assessment should take account of the cultural variances and special requirements that apply in particular situations.

### Context of Assessment and Resource Implications

Assessment must ensure:

- Demonstration of communication skills through interaction with others
- Project or work activities that allow the candidate to respond to multiple and varying customer service and communication situations relevant to the job role.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

### Assessment Methods

Assessment methods must be chosen to ensure that communication skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- Direct observation of the candidate carrying out work tasks involving dealing with customers and colleagues
- Role plays about communication situations and dealing with conflicts and misunderstandings
- Review of simple messages written by the candidate for various situations
- Questions about effective communication and personal presentation
- Review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Linkages with Other Units

This is a core unit which underpins effective performance in all other units. It is strongly recommended that it be delivered and assessed in conjunction with other relevant operational and service units.

This unit has particular linkages to the following units and combined training and assessment is strongly recommended:

- THHCOR02B Work in a socially diverse environment
- THHGCS02B Promote products and services to customers
- THHGCS03B Deal with conflict

### Key Terms and Concepts

- Communication
- Communication media
- Complaint handling
- Conflict resolution
- Cultural diversity
- Interpersonal skills
- Needs and expectations
- Negotiation
- Personal presentation
- Problem-solving
- Service
- Task management
- Teamwork
- Time management
- Work ethic
- Work goals
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<tbody>
<tr>
<td>1</td>
<td>Communicate in the workplace</td>
<td>1.1 Conduct communication with customers and colleagues in a polite, professional and friendly manner.</td>
<td>This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. Depending upon the enterprise or specific situations, customers and colleagues may be: • workmates/colleagues • external customers and clients • members of other tourism and hospitality industry sectors • individuals or groups such as consultants and committees • government or organisations • local residents • visitors • media. Situations and contexts in which this unit may be applied might include: • in an office • back of house • front of house • reception area • on tour • on site • using a phone or mobile phone. Non-verbal communication may include: • body language • dress and accessories • gestures and mannerisms • voice tonality and volume • use of space • culturally specific communication customs and practices.</td>
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<td>Learning experiences for the HSC must address: Effective communication skills including: • active listening • questioning techniques • body language • language targeted to audience.</td>
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<tr>
<td>Element</td>
<td>Performance Criteria</td>
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<td>HSC Requirements and Advice</td>
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</table>
| 1.3     | Use appropriate non-verbal communication in all situations. | The importance of communicating in language that is:  
- clear  
- concise  
- directive  
- purposeful  
- correct  
- courteous  
- culturally sensitive.  
Written communication media including:  
- messages  
- electronic mail  
- memorandum  
- facsimiles  
- general correspondence.  
Effective verbal communication including:  
- appropriate language  
- clear voice  
- audible volume  
- courteous tone.  
Learning experiences for the HSC must address:  
Effective communication techniques in relation to non-verbal communication including:  
- understanding body language  
- interpreting subtext  
- gestures  
- standards of dress.  |
| 1.4     | Observe and take into consideration non-verbal communication of colleagues and customers. | Cultural and social differences may include:  
- modes of greeting, farewelling and conversation  
- body language – use of body gestures  
- formality of language.  
Learning experiences for the HSC must address:  
An appreciation of how cultural diversity contributes to differing social values, expectations, and customs.  
The importance of respecting cultural difference and adopting a sensitive approach when dealing with communication in the workplace.  |
| 1.5     | Show sensitivity to cultural and social differences. | Learning experiences for the HSC must address:  
Understanding body language, personal space, gestures and subtext.  |

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November 2002  
THHCOR01B  
Work with colleagues and customers
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<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
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<tbody>
<tr>
<td>1.6</td>
<td>Use active listening and questioning to facilitate effective two-way communication.</td>
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<td>Learning experiences for the HSC must address:</td>
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<tr>
<td></td>
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<td></td>
<td>Effective communication techniques in relation to listening:</td>
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<td></td>
<td></td>
<td></td>
<td>• active listening</td>
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<td>• barriers to effective listening.</td>
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<td>Effective questioning techniques:</td>
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<td>• closed</td>
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<td>• reflective.</td>
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<tr>
<td>1.7</td>
<td>Identify potential and existing conflicts and seek solutions in conjunction with parties involved.</td>
<td></td>
<td>Learning experiences for the HSC must address:</td>
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<tr>
<td></td>
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<td>Recognising potential for conflict through:</td>
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<td>• active listening</td>
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<td></td>
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<td>• observing body language</td>
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<td></td>
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<td>• reading subtext.</td>
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<td>An understanding of how the following may contribute to potential conflict:</td>
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<tr>
<td></td>
<td></td>
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<td>• poor customer service</td>
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<td>• variations in colleagues’ work practices/methods</td>
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<td>• cultural misunderstanding</td>
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<td>• barriers to communication</td>
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<td>• aggressive behaviour.</td>
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<td>An understanding of conflict resolution techniques, specifically those that:</td>
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<td>• eliminate adversarial contests</td>
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<td>• promote the concept of ‘win-win’</td>
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<td>• allow for solutions that meet all parties’ needs</td>
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<td>• follow due process – listen, acknowledge, respond, report and follow up.</td>
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<tr>
<td>1.8</td>
<td>Select an appropriate medium of communication for the particular audience, purpose and situation, taking into consideration the characteristics of each medium and the relevant factors involved.</td>
<td>Media for communication may include:</td>
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<td></td>
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<td>• fax</td>
<td>Learning experiences for the HSC must address:</td>
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<tr>
<td></td>
<td></td>
<td>• email or other electronic communication</td>
<td>Features and benefits of using different types of communication media including:</td>
</tr>
<tr>
<td></td>
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<td>• simple written messages eg restaurant bookings or phone messages</td>
<td>• facsimile</td>
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<td>• face-to-face</td>
<td>• email</td>
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<td>• telephone</td>
<td>• simple written messages</td>
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<td>• two-way communication systems</td>
<td>• proformas</td>
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<td>• standard forms and proformas.</td>
<td>• telephone</td>
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<td>• face-to-face.</td>
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<td>Element</td>
<td>Performance Criteria</td>
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<td>HSC Requirements and Advice</td>
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</table>
| 1.9     | Use the medium correctly and according to standard protocol and enterprise procedures. | Factors which affect selection of the appropriate medium may include:  
- technical and operational features  
- access of the sender and receiver to necessary equipment  
- technical skills required to use the medium  
- required format  
- degree of formality required  
- urgency and timeframes. | Factors affecting selection of a particular medium:  
- technical and operational features  
- access of the sender and receiver to necessary equipment  
- technical skills required to use the medium  
- required format  
- degree of formality required  
- urgency and timeframes.  
Selection and use of various communication methods in a variety of potential and real situations in the workplace. |
| 2       | Maintain personal presentation standards | Protocol and enterprise procedures may include:  
- modes of greeting and farewelling  
- addressing the person by name  
- time-lapse before a response  
- style manual requirements  
- standard letters and proformas. | Learning experiences for the HSC must address:  
Protocol and enterprise procedures used for:  
- greeting and farewelling customers  
- addressing customers by name  
- time lapse before a response  
- style manual requirements for written communication. |
| 2.1     | Practise high standards of personal presentation in accordance with:  
- enterprise requirements  
- work location  
- occupational health and safety issues  
- impacts on different types of customers  
- specific requirements for particular work functions. | Personal presentation may include:  
- dress  
- hair and grooming  
- hands and nails  
- jewellery. | Learning experiences for the HSC must address:  
Personal presentation, image and hygiene standards required in the workplace including:  
- clean hands and nails  
- clean and tidy hair  
- attention to grooming  
- pleasant body odour  
- good oral hygiene  
- correct posture  
- attention to personal hygiene  
- positive and friendly attitude  
- clean uniform  
- deportment  
- etiquette.  
Dress standards, uniform care and maintenance.  
The extent to which personal presentation standards are influenced by enterprise:  
- work location  
- job function  
- OHS issues  
- customer expectations. |
<table>
<thead>
<tr>
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</table>
| 3       | Provide service to colleagues and customers | **3.1** Identify customer needs and expectations correctly, including those with special needs, and provide appropriate products, services or information. | Depending upon the enterprise or specific situations, customers and colleagues may be:  
- workmates/colleagues  
- external customers and clients  
- members of other tourism and hospitality industry sectors  
- individuals or groups such as consultants and committees  
- government or organisations  
- local residents  
- visitors  
- media.  
Customers with specific needs may include:  
- those with a disability  
- those with special cultural or language needs  
- unaccompanied children  
- parents with young children  
- pregnant women  
- single women | **Learning experiences for the HSC must address:**  
Difference between needs and expectations.  
Factors influencing needs and expectations including:  
- social  
- cultural  
- economic  
- health  
- age  
- personality  
- personal interests  
- likes and dislikes  
- time available  
- perception  
- demographic.  
Typical expectations and special needs of following customer types:  
- physically challenged including impaired sight, hearing or mobility  
- pregnant women  
- families with children  
- unaccompanied children  
- business people  
- travellers with special cultural or language needs  
- elderly. |
|         |                      | **3.2** Meet all reasonable needs and requests of customers within acceptable enterprise time frames. | | **Learning experiences for the HSC must address:**  
Quality service:  
- customer-focused definition of service  
- characteristics of quality service  
- customer service skills, including:  
  - meeting customer requirements  
  - handling customer requests and complaints  
  - developing rapport  
  - promoting suitable products and services  
- responsibilities of the organisation and staff for service  
- contribution of staff behaviour to quality customer service  
- ethics of professional tourism behaviour  
- work ethic |
<p>|         |                      | <strong>3.3</strong> Identify and take all opportunities to enhance the quality of service. | |</p>
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.4</td>
<td>Recognise customer dissatisfaction promptly and take action to resolve the situation according to individual level of responsibility and enterprise procedures.</td>
<td>• importance of quality customer service to tourism industry. Effective responses to a range of different customer service situations.</td>
<td>Learning experiences for the HSC must address: Common causes of customer dissatisfaction and complaints. Procedures for handling customer complaints: • listen • acknowledge • establish problem • confirm and agree on an acceptable solution • action • record • follow up to ensure customer satisfaction. Effective responses to typical customer complaints in tourism enterprises. Workplace practice – examples of procedures used by tourism enterprises for handling customer complaints.</td>
</tr>
<tr>
<td>3.5</td>
<td>Handle customer complaints positively, sensitively and politely and in consultation with the customer.</td>
<td>Establishing the details of the customer complaint through: • questioning and active listening techniques • summarising and clarifying the issue • recording details of complaint • discussing with customer the process of resolution.</td>
<td>Learning experiences for the HSC must address: Handling complaints diplomatically, so that all parties recognise that: • the issue has been raised with the relevant authority • all points of view have been aired • discretion will be applied in resolving the matter • due process will be followed • action will be taken to address and remedy the matter.</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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</tr>
<tr>
<td>3.6</td>
<td>Refer difficult complaints to the appropriate person in accordance with individual level of responsibility and enterprise policy and procedures.</td>
<td></td>
<td><strong>Learning experiences for the HSC must address:</strong></td>
</tr>
<tr>
<td></td>
<td>3.7</td>
<td>Maintain a positive and co-operative manner at all times.</td>
<td><strong>Learning experiences for the HSC must address:</strong></td>
</tr>
<tr>
<td>4</td>
<td><strong>Work in a team</strong></td>
<td></td>
<td><strong>Learning experiences for the HSC must address:</strong></td>
</tr>
<tr>
<td>4.1</td>
<td>Demonstrate trust, support and respect towards team members in day-to-day work activities.</td>
<td></td>
<td><strong>Learning experiences for the HSC must address:</strong></td>
</tr>
<tr>
<td>4.2</td>
<td>Recognise and accommodate cultural differences within the team.</td>
<td></td>
<td><strong>Learning experiences for the HSC must address:</strong></td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
</tr>
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<td>-----------------------------</td>
</tr>
</tbody>
</table>
| 4.3     | Identify work-team goals jointly with colleagues and relevant others. |  | Learning experiences for the HSC must address:  
An analysis of teams and their:  
• purpose/aims  
• size  
• goals.  
The features and characteristics of successful teamwork including:  
• goal-setting  
• planning and organising work routines on a daily, weekly or monthly basis. |
| 4.4     | Identify, prioritise and complete individual tasks within designated time frames. |  | Learning experiences for the HSC must address:  
Principles of time and task management.  
Organising tasks in terms of:  
• prioritising  
• time management  
• negotiation  
• deadlines  
• individual needs  
• group needs.  
The features of time management:  
• prioritising  
• delegation  
• problem-solving  
• decision-making. |
| 4.5     | Seek assistance from other team members, supervisors and managers when required. |  | Learning experiences for the HSC must address:  
Standard procedures for specific enterprises found in:  
• manuals  
• information from supervisors  
• standard business protocols.  
Reasons for seeking assistance from the following personnel:  
• human resources officers  
• supervisors  
• department managers. |
<table>
<thead>
<tr>
<th>Element</th>
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<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.6</td>
<td>Offer assistance to colleagues when required, to ensure designated work goals are met.</td>
<td></td>
<td>Learning experiences for the HSC must address: Importance of demonstrating respect and empathy in dealings with colleagues. Reasons why cooperation and good working relationships are important. Knowledge of work group member’s responsibilities and duties. Planning and organising work routines.</td>
</tr>
<tr>
<td>4.7</td>
<td>Acknowledge and respond to feedback and information from other team members.</td>
<td></td>
<td>Learning experiences for the HSC must address: How to elicit and interpret feedback. Acknowledging work performance including:  - conducting performance appraisals  - evaluating performance  - improving work practices.</td>
</tr>
<tr>
<td>4.8</td>
<td>Negotiate changes to individual responsibilities to meet reviewed work goals.</td>
<td></td>
<td>Learning experiences for the HSC must address: Skills required including:  - negotiation skills  - communication skills  - prioritising skills</td>
</tr>
</tbody>
</table>
Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing</td>
<td>1</td>
<td>Responding to instructions and requests from customers and colleagues</td>
</tr>
<tr>
<td>Information</td>
<td></td>
<td>Seeking out and reviewing information related to work activities</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>2</td>
<td>Receiving, following and giving instructions to others in the team</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Providing customers with information about products and services, assisting them with requests</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Passing on messages in writing to colleagues</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Planning, organising and prioritising work tasks and responsibilities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Making arrangements for customers</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>2</td>
<td>Working co-operatively with colleagues</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Clarifying personal responsibilities</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>2</td>
<td>Dealing with conflicts and misunderstandings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Exploring reasons for communication breakdown and working out solutions in consultation with others</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using computers, telephone equipment, fax machines and other communications equipment</td>
</tr>
</tbody>
</table>
### Training Package

<table>
<thead>
<tr>
<th>Hospitality (THH02)</th>
<th>Work in a socially diverse environment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong></td>
<td><strong>Work in a socially diverse environment</strong></td>
</tr>
<tr>
<td><strong>Unit Code</strong></td>
<td><strong>THHCOR02B</strong></td>
</tr>
<tr>
<td><strong>Unit Descriptor:</strong></td>
<td>This unit deals with the cultural awareness that is required by all people working in the tourism and hospitality industries. It includes the cultural awareness required for serving customers and working with colleagues from diverse backgrounds.</td>
</tr>
</tbody>
</table>

### Essential Knowledge and Skills to be Assessed

The following knowledge and skills must be assessed as part of this unit:
- principles that underpin cultural awareness
- characteristics of the different cultural groups in Australian society
- basic knowledge of the cultures of Australia’s indigenous and non-indigenous peoples
- identification of various international tourist groups, as appropriate to the sector and individual workplace
- principles of Equal Employment Opportunity (EEO) and anti-discrimination legislation as they apply to individual employees.

### Critical Aspects of Assessment

Evidence of the following is critical:
- cultural understanding and sensitivity in responding to different types of customers
- ability to identify and respond to the cultural context of the workplace
- ability to apply knowledge of different cultures and cultural characteristics appropriately to communication with colleagues and customers
- ability to communicate effectively with customers and colleagues from a broad range of backgrounds as required for the relevant job role.

### Context of Assessment and Resource Implications

Assessment must ensure:
- project or work activities that allow the candidate to demonstrate knowledge and awareness of diversity issues in the workplace.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

### Assessment Methods

Assessment methods must be chosen to ensure that candidates are able to respond constructively to issues which arise in a culturally and socially diverse workplace. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:
- observation of the candidate interacting with colleagues and customers from diverse backgrounds
- case studies or projects to consider particular conflict situations arising from diversity and to suggest appropriate means of dealing with them
- questions about effective communication, problem-solving techniques and cultural values and differences
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Linkages with Other Units

This unit must be assessed with or after the following unit. These units describe skills and knowledge that are essential to this unit of competence. Continued training and assessment in this unit is recommended:
- **THHCOR01B** Work with colleagues and customers.

This unit also has linkages to the following units and combined training and assessment is recommended:
- **THHGCS02B** Promote products and services to customers
- **THHGCS03B** Deal with conflict
- **THTLANO101A** Conduct basic workplace oral communications in a language other than English, and other Language Other than English units

### Key Terms and Concepts

- anti-discrimination
- Anti-discrimination Act 1977 (NSW)
- barriers to communication
- beliefs
- cultural awareness principles
- cultural diversity
- cultural groups
- cultural similarities and differences
- cultural sensitivity
- cultural values and mores
- customs
- effective communication
- empathy
- Equal Employment Opportunity (Commonwealth Authorities) Act 1987 (Cth) (EEO)
- ethnocentrism
- gestures
- internal and external customers
- Racial Discrimination Act 1975 (Cth)
- stereotyping
- support services
- tolerance
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Communicate with customers and colleagues from diverse backgrounds</td>
<td>1.1 Value customers and colleagues from different cultural groups and treat them with respect and sensitivity. This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. Cultural differences may arise from: • race • language • special needs • disabilities • family structure • gender • age • sexual preference.</td>
<td>Learning experiences for the HSC must address: An appreciation of how cultural diversity contributes to differing values, beliefs, attitudes and customs. An understanding of: • the significance of cultural values and mores • cultural diversity in the Australian population • cultural diversity of local and international customers. Knowledge of cultural expectations of major international tourist markets into Australia including: • Asia • Japan • Korea • Europe • America • United Kingdom • New Zealand. Elements of cultural diversity including: • interpersonal relations • festivals/celebrations • language • food preferences and dietary needs • religion • customs • different work ethic • communication. Knowledge of religions including: • Islam • Hinduism • Sikhism • Buddhism • Judaism • Christianity. An understanding of the need for tolerance and respect within the workplace.</td>
</tr>
<tr>
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</tr>
</tbody>
</table>
| 1.2     | Take into consideration cultural differences in all verbal and non-verbal communication. | Attempts to overcome language barriers may be made in order to:  
- meet and greet/farewell customers  
- give simple directions  
- give simple instructions  
- answer simple enquiries  
- prepare for, serve and assist customers  
- describe goods and services. | Learning experiences for the HSC must address:  
Effective cross-cultural communication skills including:  
- active listening  
- questioning techniques  
- body language  
- language targeted to audience.  
The importance of communicating in language that is:  
- clear  
- concise  
- directive  
- purposeful  
- courteous  
- culturally sensitive.  
An understanding of tone, body language and subtext. |
| 1.3     | Communicate through the use of gestures or simple words in the other person’s language, where language barriers exist. | Learning experiences for the HSC must address:  
A range of gestures, words and phrases that are:  
- clear  
- concise  
- directive  
- courteous  
- culturally sensitive.  
Signs with corresponding diagram including:  
- toilet, first aid, phone, disabled and no smoking.  
Gestures that are universally understood including:  
- applause, stop and bill please.  
Barriers to communication:  
- negative subtext  
- ethnocentrism  
- bias and stereotyping  
- lack of empathy  
- gender issues. |
| 1.4     | Obtain assistance from colleagues, reference books or outside organisations when required. | Outside organisations may include:  
- interpreter services  
- diplomatic services  
- local cultural organisations  
- appropriate government agencies  
- educational institutions. | Learning experiences for the HSC must address:  
The range of sources of information and support services available within the community to assist with the provision of effective customer service including:  
- internal services including specialist staff  
- external services including government authorities. |
<table>
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</tr>
</thead>
<tbody>
<tr>
<td>2 Deal with cross cultural</td>
<td>2.1 Identify issues that may cause conflict or misunderstanding in the workplace.</td>
<td>Possible cultural differences may include those arising from:</td>
<td>Learning experiences for the HSC must address:</td>
</tr>
<tr>
<td>misunderstandings</td>
<td></td>
<td>• language spoken</td>
<td>Issues which may cause conflict or misunderstanding in the workplace including:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• forms of address</td>
<td>• speaking too quickly/quietly</td>
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<tr>
<td></td>
<td></td>
<td>• levels of formality/informality</td>
<td>• no visual clues</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• non-verbal behaviour, understandings and interpretations</td>
<td>• poor observation</td>
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<tr>
<td></td>
<td></td>
<td>• work ethics</td>
<td>• poor communication style</td>
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<tr>
<td></td>
<td></td>
<td>• personal grooming</td>
<td>• intolerance</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• dress</td>
<td>• prejudice</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• family and social obligations and status</td>
<td>• inadequate language skills</td>
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<tr>
<td></td>
<td></td>
<td>• observance of special religious, feast or other celebratory days</td>
<td>• not clarifying or asking questions</td>
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<tr>
<td></td>
<td></td>
<td>• customs, beliefs and values</td>
<td>• inappropriate body language</td>
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<tr>
<td></td>
<td></td>
<td>• special needs</td>
<td>• poor understanding of other cultures.</td>
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<tr>
<td></td>
<td></td>
<td>• product preferences</td>
<td>Conflict resolution procedures.</td>
</tr>
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<td></td>
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</tr>
<tr>
<td></td>
<td>2.2 Address difficulties with the appropriate people and seek assistance from team</td>
<td>Outside organisations may include:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>leaders or others where required.</td>
<td>• interpreter services</td>
<td>Learning experiences for the HSC must address:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• diplomatic services</td>
<td>Lines of reporting/communication with supervisors and peers within the workplace.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• local cultural organisations</td>
<td>How and when to seek assistance.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• appropriate government agencies</td>
<td>Team problem-solving activities including:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• educational institutions</td>
<td>• identifying problem</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• consider solutions</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• action</td>
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<td></td>
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<td></td>
<td>• follow-up.</td>
</tr>
<tr>
<td>Element</td>
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</tbody>
</table>
| 2.3     | Consider possible cultural differences when difficulties or misunderstandings occur. | Cultural differences may arise from:  
- race  
- language  
- special needs  
- disabilities  
- family structure  
- gender  
- age  
- sexual preference.  
Possible cultural differences may include those arising from:  
- language spoken  
- forms of address  
- levels of formality/informality  
- non-verbal behaviour, understandings and interpretations  
- work ethics  
- personal grooming  
- dress  
- family and social obligations and status  
- observance of special religious, feast or other celebratory days  
- customs, beliefs and values  
- special needs  
- product preferences. | Learning experiences for the HSC must address:  
The importance of respecting cultural difference and adopting a sensitive approach when dealing with misunderstandings in the workplace.  
Cultural differences arising from:  
- race  
- language  
- family structure  
- gender  
- age.  
Common causes of misunderstanding between different cultural groups including:  
- non-verbal behaviour, understanding and interpretations  
- family and social obligations and status  
- religion  
- customs, beliefs and values  
- dress.  
The principles of equal employment opportunity (EEO) and anti-discrimination legislation as it applies to employees:  
- Equal Employment Opportunity (Commonwealth Authorities) Act 1987 (Cth)  
- Anti-discrimination Act 1977 (NSW)  
- Racial Discrimination Act 1975 (Cth).  
Reciprocal rights and responsibilities of employers/employees in relation to EEO and anti-discrimination. |
| 2.4     | Make efforts to resolve misunderstandings, taking account of cultural considerations. | Learning experiences for the HSC must address:  
Establishing good customer service practices including:  
- tolerance of peoples’ differing beliefs and values  
- prompt response to resolve misunderstandings  
- efficient communication in language that is understood by all parties  
- friendly and courteous manner  
- positive gestures and body language.  
Organisational strategies including:  
- staff training  
- utilising staff cultural skills |
### Element: Work in a socially diverse environment

#### Performance Criteria
- Writing communication and signs in different languages
- Promoting cultural celebrations
- Flexibility
- Variety in communication methods
- Knowledge of location of cultural buildings and support agencies.

#### Range Statement

#### HSC Requirements and Advice

- Individual strategies including:
  - Learning basics of another language
  - Developing an understanding and tolerance of cultural diversity
  - Overcoming prejudice and assumptions
  - Utilising non-verbal communication skills
  - Actively seeking to breakdown barriers
  - The importance of professionalism.

#### Learning experiences for the HSC must address:

- Reasons for reporting difficulties associated with cross-cultural misunderstandings to the following personnel:
  - Human resources officers
  - Supervisors
  - Department managers.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>1</td>
<td>Identifying different cultural beliefs and values</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>2</td>
<td>Explaining how to do something to a colleague or customer from another language or cultural background</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Considering ways to deal with cultural conflicts or problems, or to improve workplace communication</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>2</td>
<td>Working co-operatively with other members of the work team, including those from diverse backgrounds</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>2</td>
<td>Dealing with problems such as communication breakdowns and misunderstandings</td>
</tr>
<tr>
<td>Using Technology</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

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Tourism Curriculum Framework  
November 2002  
THHCOR02B  
Work in a socially diverse environment  
23
## Essential Knowledge and Skills to be Assessed

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

- Individual employee responsibilities in relation to insurance and liability requirements
- Obligations of employers and employees in relation to relevant State/Territory occupational health and safety legislation
- Commonly found health, safety and security procedures in tourism and hospitality workplaces
- Safe work practices relevant to individual job roles and responsibilities
- Major causes of workplace accidents related to the work environment.

## Critical Aspects of Assessment

Evidence of the following is critical:

- Ability to follow established procedures
- Knowledge and understanding of the implications of disregarding those procedures
- Demonstration of safe work practices for particular job roles
- Knowledge and understanding of the legal requirement to work in accordance with health, safety and security procedures.

## Context of Assessment and Resource Implications

Assessment must ensure:

- Project or work activities that allow the candidate to demonstrate safe work practices for particular job roles and contexts.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

## Assessment Methods

Assessment methods must be chosen to ensure that knowledge of workplace health and safety issues can be demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- Direct observation of the candidate explaining workplace safety or emergency procedures to a colleague or customer
- Direct observation of the candidate demonstrating safe work practices for particular job roles
- Case studies and problem solving exercises for emergency situations
- Oral or written questions about legislation and requirements relating to workplace safety and security
- Oral or written questions about appropriate clothing and protective gear for particular jobs and situations
- Review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

## Key Terms and Concepts

- Basic first aid
- Duty of care
- Emergency services
- Emergency situation
- Employer responsibilities
- Ergonomics
- Hazard control
- Hazard identification
- Health and safety
- Health, safety and security procedures
- Hygiene
- Liability
- Occupational Health and Safety Act 2000 (NSW)
- Occupational health and safety committee
- Occupational Health and Safety Regulations (2001) (NSW)
- Occupational Overuse Syndrome (OOS)
- Personal grooming
- Protective clothing
- Reporting
- Safe work practices
- Security breach
- Suspicious behaviour
- Unauthorised persons
- Workers compensation
- WorkCover
- Workplace injury

---

**Title:** Follow health, safety and security procedures

**Unit Code:** THHCOR03B

**Unit Descriptor:**

This unit deals with the skills and knowledge required to follow health, safety and security procedures. This unit applies to all individuals working in the tourism and hospitality industries. It does not cover hygiene or first aid which are found in the units THHGHS01B Follow workplace hygiene procedures and THHGHS03B Provide first aid.

**HSC Indicative Hours:**

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<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 1       | Follow workplace procedures for health, safety and security | 1.1 Follow correct health, safety and security procedures in accordance with enterprise policy, relevant legislation and insurance requirements. | This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. Health, safety and security procedures may include those related to:  
- use of personal protective clothing and equipment  
- safe posture including sitting, standing, bending  
- manual handling including lifting, transferring  
- safe work techniques including using knives and equipment, handling hot surfaces, computers and electronic equipment  
- safe handling of chemicals, poisons and dangerous materials  
- ergonomically sound furniture and work stations  
- emergency, fire and accident  
- hazard identification and control  
- security of documents, cash, equipment, people  
- key control systems. | Learning experiences for the HSC must address:  
Cost of workplace injury:  
- human  
- social  
- economic  
- organisational.  
An understanding of NSW occupational health and safety legislation:  
- Occupational Health and Safety Act 2000 (NSW)  
- Occupational Health and Safety Regulations 2001 (NSW)  
- Workers Compensation Act 1987 (NSW).  
Employer responsibilities under the Occupational Health and Safety Act:  
- maintain places of work under their control in a safe condition, and ensure safe entrances and exits  
- make arrangements to ensure the safe handling, storage and transport of plant and substances  
- provide and maintain systems of work and work environments that are safe and without risks to health  
- provide information, instruction, training and supervision necessary to ensure the health and safety of employees  
- provide adequate facilities for the welfare of employees  
- must not require employees to pay for anything done or provided to meet specific requirements made under the Act or Regulation  
- must consult with employees about OHS matters to enable them to contribute to decisions affecting their health, safety and welfare  
- ensure the health and safety of visitors or people working who are not employees  
Employee responsibilities under the Occupational Health and Safety Act:  
- employees must take reasonable care of the health and safety of themselves and others  
- employees must cooperate with employers in their efforts to comply with occupational health and safety requirements  
- employees must not interfere with or misuse things |
<table>
<thead>
<tr>
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<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 1.2     | Identify and promptly report breaches of health, safety and security procedures. | Breaches of procedures and issues requiring attention may include:  
- loss of keys  
- strange or suspicious persons  
- broken or malfunctioning equipment | provided for the health, safety or welfare of persons at work  
- employees must not obstruct attempts to give aid or attempts to prevent serious risk to the health and safety of a person at work  
- employees must not refuse a reasonable request to assist in giving aid or preventing a risk to health and safety  
- employees must not disrupt workplace by creating false health or safety fears  
An understanding of the role of and function of WorkCover.  
An understanding of the formation, role and responsibilities of the occupational health and safety committee in the workplace.  
Monitoring and reporting for OHS:  
- forms (safety audit, accident report, Work Cover)  
- registers  
- logs  
- checklists  
- files.  
Health, safety and security procedures including:  
- use of personal protective clothing and equipment  
- safe posture including sitting, standing and bending  
- manual handling including lifting and transferring  
- safe work techniques including computers and electronic equipment  
- ergonomically sound furniture and work stations  
- dealing with emergency, fire and accidents  
- hazard identification and control  
- security of documents, cash, equipment and supplies, people and materials  
- key control systems.  
An understanding of the following forms of insurance:  
- third party  
- workers’ compensation  
- public liability.  
Learning experiences for the HSC must address:  
Issues that compromise health and safety:  
- poor lighting  
- workplace bullying |
<table>
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</tr>
</thead>
</table>
| 1.3     | Report any suspicious behaviour or unusual occurrences promptly to the designated person. |  • loss of property, goods or materials  
• damaged property or fittings  
• lack of suitable signage when required  
• lack of training on health and safety issues  
• unsafe work practices. |  • broken or malfunctioning equipment  
• damaged property or fittings  
• lack of suitable signage when required  
• lack of training on health and safety issues  
• unsafe work practices.  

Security breaches including:  
• loss of keys  
• unauthorised access to confidential files and computer systems  
• loss of cash, goods or materials  
• unauthorised visitors in ‘staff only’ areas  
• unidentified powders/chemicals found in post packages.  

Potential hazards identified as:  
• chemical  
• physical  
• biological  
• psychological  
• ergonomic.  

Common workplace injuries and their causes including:  
• cuts  
• falls  
• back injuries  
• muscle strains  
• eyestrain  
• OOS (Occupational Overuse Syndrome).  

Notification of health, safety and security breaches by formal means – including written report or memo. |
| 2       | Deal with emergency situations |  • bomb threats  
• deranged customers  
• accidents  
• robbery or armed hold up  
• fire |  Learning experiences for the HSC must address:  
An understanding of the extent of the range of potential suspicious behaviours or unusual occurrences including:  
• unauthorised access to computer systems  
• unusual cash movements  
• unidentified persons in restricted areas  
• unidentified powders/chemicals found in post packages.  

Learning experiences for the HSC must address:  
Notification of emergency situations to supervisor and colleagues. |
<table>
<thead>
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</tr>
</thead>
</table>
| 2.2     | Follow emergency procedures correctly in accordance with enterprise procedures. | • floods  
  • earthquakes  
  • power failure | Types of emergency situations:  
  • bomb threats  
  • deranged customers  
  • accident / medical  
  • robbery or armed hold up  
  • fire  
  • floods  
  • earthquakes  
  • power failure. |
| 2.3     | Seek assistance promptly from colleagues and/or other authorities where appropriate. |                         | Learning experiences for the HSC must address:  
  Procedures to follow in the event of an emergency including:  
  • bomb threats  
  • deranged customers  
  • accident / medical  
  • robbery or armed hold up  
  • fire  
  • floods  
  • earthquakes  
  • power failure. |
| 2.4     | Report details of emergency situations accurately in accordance with enterprise policy. |                         | Learning experiences for the HSC must address:  
  The role of:  
  • first aid officers  
  • safety officers  
  • security officers  
  • emergency services  
  • WorkCover. |
| 3       | Maintain safe personal presentation standards |                         | Learning experiences for the HSC must address:  
  Methods of alerting others and formally reporting emergency situations through written and verbal processes |
| 3.1     | Ensure that personal presentation takes account of the workplace environment and health and safety issues including:  
  • appropriate personal grooming and hygiene  
  • appropriate clothing and footwear. | Health, safety and security procedures may include those related to:  
  • use of personal protective clothing and equipment  
  • safe posture including sitting, standing, bending  
  • manual handling including lifting, transferring  
  • safe work techniques including using knives and equipment, handling hot surfaces, computers and electronic equipment. | Learning experiences for the HSC must address:  
  Reasons why an enterprise may mandate for staff:  
  • standards of personal grooming  
  • standards of personal hygiene  
  • uniforms, protective clothing, and/or footwear  
  • training in safe work practices. |
<table>
<thead>
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</tr>
</thead>
</table>
| 4 Provide feedback on health, safety and security | 4.1 Identify issues requiring attention. | • safe handling of chemicals, poisons and dangerous materials  
• ergonomically sound furniture and work stations  
• emergency, fire and accident  
• hazard identification and control  
• security of documents, cash, equipment, people  
• key control systems. | Learning experiences for the HSC must address:  
Hazards identified as either:  
• physical  
• chemical  
• psychological  
• environmental  
• biological  
• ergonomic |
| 4.2 Raise issues with the designated person(s) in accordance with enterprise and legislative requirements. | | Learning experiences for the HSC must address:  
Notification to OHS committee or immediate supervisor of a health, safety or security breach through formal and informal processes. |

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.  

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
</table>
| Collecting, Organising and Analysing Information | 1 | Accessing legislation and regulations about workplace health and safety  
Reading procedures and manuals for using equipment and doing various jobs |
| Communicating Ideas and Information | 1 | Explaining workplace health, safety and security requirements to colleagues and customers |
| Planning and Organising Activities | 1 | Assembling clothing, protective gear and equipment for particular jobs |
| Working with Others and in Teams | 1 | Participating pro-actively in an occupational health and safety committee |
| Using Mathematical Ideas and Techniques | 1 | Measuring specified quantities and ratios of chemicals and other substances for safe use |
| Solving Problems | 1 | Dealing with issues such as health, safety and security breaches or problems |
| Using Technology | 1 | Using safety and security equipment such as fire extinguishers and alarms |
### Training Package
**Hospitality (THH02)**

### Title:
**Develop and update local knowledge**

### Unit Code
**THHGCS01B**

### Unit Descriptor:
This unit deals with the skills and knowledge required to build and maintain the local knowledge that is required to effectively respond to general customer information requests in a range of tourism and hospitality enterprises. This unit reflects a context where the provision of information is not the primary job role (eg within an attraction or a restaurant). The unit has a link to unit THTSOP02B Source and provide destination information and advice, (Tourism Training Package) which reflects a context where provision of advice is the primary job role (eg a visitor information officer or travel consultant).

### HSC Indicative Hours:
**10**

### Essential Knowledge and Skills to be Assessed
The following knowledge and skills must be assessed as part of this unit:
- sources of information for enterprise and local knowledge
- general knowledge of the enterprise, local attractions, events, transport options, general visitor facilities including shopping, currency exchanges, post offices, banks, emergency services.

### Critical Aspects of Assessment
- Evidence of the following is critical:
  - ability to source accurate and current information on the local area
  - general knowledge of the local area sufficient to answer commonly asked customer questions as relevant to the job role.

### Context of Assessment and Resource Implications
- Assessment must ensure:
  - project or work activities that allow the candidate to respond to a range of commonly asked customer questions.

### Assessment Methods
- Assessment methods must be chosen to ensure that the application of knowledge to different customer service situations can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

#### Linkages with Other Units
This unit underpins effective performance in a range of other units and combined training and assessment may be appropriate. Examples include:
- THHBH01B Provide housekeeping services to guests
- THHBF010B Provide porter services
- THHBF02B Provide accommodation reception services
- WRRS2B Advise on products and services
- many other units in the Attractions and Theme Parks section

### Key Terms and Concepts
- brochure racks
- communication channels
- destination
- effective communication
- famils (familiarisations)
- filing classifications
- gap analysis
- local tourism authority (LTA)
- product information
- record keeping
- research skills
- sources of information
- validity of sources
- visitor information centres (VIC).
<table>
<thead>
<tr>
<th>Element</th>
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<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop local knowledge</td>
<td>Identify and access appropriate sources of information on the local area.</td>
<td>This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. Sources of information on the local area may include: • brochures • timetables • local visitor guides • library and local council • local people • enterprise information • room directories • maps • Internet. The range of local information required will vary according to the particular industry sector, location and individual workplace. Information must include: • enterprise specific information • local transport options • local attractions • local events • general visitor facilities including shopping locations, currency exchanges, post offices, banks, emergency services. Information may include: • specific shopping details, markets • restaurants, cafes and other dining venues • other facilities and services such as hairdressers, dentists, travel agencies • theatres and entertainment venues • sporting facilities • tours, local outings and trips • travelling routes • weather conditions</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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</tbody>
</table>
| 1.2     | Record and file information for further use as appropriate and in accordance with enterprise procedures. |               | Learning experiences for the HSC must address:  
Storing and accessing information resources including:  
• creating and indexing resources  
• electronic or hard copy backups  
• updating files and resource information  
• location of resources and filing systems.  
Forms of electronic storage:  
• database  
• web brochures  
• e-facts sheets.  
Filing classifications including:  
• alphabetical  
• numerical  
• geographical  
• chronological  
• subject  
• key word.  
Maintaining system integrity through updating records. |               |
| 1.3     | Identify and obtain the types of information commonly requested by customers |               | Learning experiences for the HSC must address:  
Conducting research to determine customer information needs.  
Common customer enquiries including:  
• shopping details  
• dining venues  
• local facilities and services  
• entertainment venues  
• sporting facilities  
• local tourism products  
• travelling routes  
• weather conditions.  
Primary research:  
• surveys  
• interviews  
• focus groups. | |
<table>
<thead>
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</tr>
</thead>
</table>
| 2       | Update local knowledge | 2.1 Identify and use opportunities to update local knowledge. | Opportunities to update local knowledge may include:  
• talking and listening to colleagues and customers  
• participation in local familiarisation tours  
• visiting the local information centre  
• personal observation/exploration  
• watching TV, videos and films  
• listening to radio  
• reading local newspapers. | Learning experiences for the HSC must address:  
Determining gaps in local knowledge (gap analysis).  
How and where to source opportunities for updating local knowledge that is of relevance to the workplace and tourism industry including:  
• talking and listening to colleagues and customers  
• participation in familis (familiarisation tours)  
• visitor information centre (VIC)  
• personal observation/exploration.  
Assessing the validity of sources of information.  
The reasons why industry enterprises conduct familis (familiarisation tours).  
The benefits of enterprise employees participating in industry familis. |
|         | 2.2 Share updated knowledge with customers and colleagues as appropriate and incorporate into day-to-day working activities. | | Learning experiences for the HSC must address:  
Effective communication skills including:  
• active listening  
• questioning techniques  
• body language  
• language targeted to audience.  
Disseminating information through a variety of channels including:  
• direct mail  
• seminars  
• corporate web sites/e-newsletters  
• call centre  
• one-on-one communication. |
### Key Competencies in this Unit

**Key Competencies** are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing</td>
<td>1</td>
<td>Organising the enterprise’s local information folder</td>
</tr>
<tr>
<td>Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Explaining the location of the nearest bus stop to a customer</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Contacting local attractions to request information brochures for display</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Assisting a colleague to answer a customer question</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>1</td>
<td>Calculating the amount of time to reach a local attraction</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Helping a lost customer who speaks very little English</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using the phone or Internet to source information on the local area</td>
</tr>
<tr>
<td>Essential Knowledge and Skills to be Assessed</td>
<td>Critical Aspects of Assessment</td>
<td>Context of Assessment and Resource Implications</td>
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<tr>
<td>----------------------------------------------</td>
<td>--------------------------------</td>
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</tr>
</tbody>
</table>
| The following skills and knowledge must be assessed as part of this unit:  
  - the enterprise’s policies and procedures in regard to telephone communication  
  - principles of effective communication in relation to listening, questioning and non-verbal communication  
  - ability to use the technical features of a specific telephone system correctly  
  - oral communication skills to convey meaning clearly and concisely  
  - interpersonal skills to relate to people from a range of social, cultural and ethnic backgrounds  
  - writing skills for taking basic messages. | Evidence of the following is critical:  
  - correct use of telephone equipment  
  - courteous and friendly telephone service  
  - clear and concise verbal and written communication. | Assessment must ensure:  
  - demonstration of skills using current telephone equipment to address multiple and different communication contexts  
  - interaction with others to demonstrate the interpersonal communication aspects of this unit | Assessment methods must be chosen to ensure that answering the phone and making phone calls can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. | Key Terms and Concepts  
  - active listening  
  - closed questions  
  - communication  
  - directory assistance  
  - enterprise policies and procedures  
  - making telephone calls  
  - message taking  
  - open questions  
  - receiving telephone calls  
  - referrals  
  - reflective questions  
  - telephone commands  
  - telephone equipment  
  - telephone etiquette  
  - telephone greeting  
  - telephone system |

**Unit Descriptor:** THHGGA01B  
Communicate on the telephone  

This unit deals with the skills and knowledge required to communicate effectively on the telephone. It is an essential skill for large numbers of people working in all sectors of the tourism and hospitality industries.
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
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</tr>
</thead>
</table>
| 1 | Respond to incoming telephone calls | 1.1 Answer calls promptly, clearly and politely in accordance with enterprise standards. | This unit applies to all hospitality and tourism operations. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. | Learning experiences for the HSC must address: Effective communication skills:  
• questioning techniques  
• active listening  
• appreciating subtext and tone of caller. Features of good telephone etiquette including:  
• greeting callers  
• using polite greeting  
• identifying the enterprise  
• identity yourself using ‘This is’ and name  
• offer of assistance  
• courteous language  
• friendly tone  
• clear articulation  
• accurate relaying of messages. Operation of telephone systems including:  
• accepting external calls  
• connecting internal and external calls  
• transferring calls to extensions  
• placing callers on hold  
• paging. The range of telephone equipment including:  
• single and multiline telephones  
• mobile telephones  
• switchboards  
• extensions  
• answering machines. |
| 1.2 | Offer friendly assistance to the caller, and accurately establish the purpose of the call. | | |
| 1.3 | Repeat call details to the caller to confirm understanding. | | |

1. Answer calls promptly, clearly and politely in accordance with enterprise standards. For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs. Telephone communication may take place in a range of different contexts including:  
• office  
• reception area  
• on tour  
• in a restaurant or kitchen  
• on site  
• using a mobile phone  
• with customers  
• with colleagues. Telephone systems have single or multiple lines.

2. Offer friendly assistance to the caller, and accurately establish the purpose of the call.

3. Repeat call details to the caller to confirm understanding.
<table>
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<tbody>
<tr>
<td>1.4</td>
<td>Answer caller enquiries promptly, or transfer caller to the appropriate location/person.</td>
<td></td>
<td>Learning experiences for the HSC must address: Establishing good customer service practices including: • knowledge of enterprise products/services and personnel • prompt response to enquiries • efficient communication • friendly and courteous manner.</td>
</tr>
<tr>
<td>1.5</td>
<td>Record caller requests accurately and pass on to the appropriate department/person for follow-up.</td>
<td></td>
<td>Responding to telephone enquiries: • arranging appointments • information about products or services • general information • referrals to other colleagues/departments • handling complaints • clarifying or resolving problems • anticipating problems • recording telephone messages by means of paper and electronically • working within designated time frames.</td>
</tr>
<tr>
<td>1.6</td>
<td>Relay messages accurately to the nominated person within designated timelines.</td>
<td></td>
<td>A range of telephone commands including: • transfer • redial • recall • group pick up • on hold • call waiting • call metering.</td>
</tr>
<tr>
<td>1.7</td>
<td>Report threatening or suspicious phone calls promptly to the appropriate person, in accordance with enterprise procedures.</td>
<td></td>
<td>Taking messages and sending them to the relevant person including: • information to be obtained • system to use to record message (paper or computerise) • repeating main points to ensure accuracy.</td>
</tr>
</tbody>
</table>

Learning experiences for the HSC must address:

Methods for recording and reporting the following unusual instances:

- threatening or suspicious telephone calls
- poor lines
- difficult-to-understand calls
- difficult customers
- emergency situations.
<table>
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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Appropriate person for reporting threatening, unusual or suspicious phone calls including:</td>
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<td></td>
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<td>• peers/colleagues</td>
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<td></td>
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<td>• supervisor</td>
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<td></td>
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<td>• department managers</td>
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<td></td>
<td></td>
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<td>• technical staff</td>
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<td></td>
<td></td>
<td></td>
<td>• emergency services.</td>
</tr>
</tbody>
</table>

| 1.8                          | Use language and tone and volume appropriate to phone calls. |                                                                                | Learning experiences for the HSC must address:                                              |
|                              |                                                            |                                                                                 | The importance of communicating on the telephone in terms of:                              |
|                              |                                                            |                                                                                 | • appropriate language                                                                     |
|                              |                                                            |                                                                                 | • clear voice                                                                              |
|                              |                                                            |                                                                                 | • audible volume                                                                          |
|                              |                                                            |                                                                                 | • courteous tone                                                                          |

| 2                             | Make telephone calls                                       |                                                                                | Learning experiences for the HSC must address:                                              |
| 2.1                          | Obtain correct telephone numbers.                         |                                                                                | Internal sources of information including:                                                  |
|                              |                                                            |                                                                                 | • telephone lists                                                                          |
|                              |                                                            |                                                                                 | • email address books                                                                      |
|                              |                                                            |                                                                                 | • corporate directories                                                                    |
|                              |                                                            |                                                                                 | • the receptionist.                                                                        |
| 2.2                          | Establish clearly the purpose of the call prior to calling.|                                                                                | External sources of information including:                                                  |
|                              |                                                            |                                                                                 | • Telstra directory assistance                                                             |
|                              |                                                            |                                                                                 | • White/ Yellow Pages (hard-copy directory and online)                                      |
|                              |                                                            |                                                                                 | • business receptionists                                                                   |
|                              |                                                            |                                                                                 | • corporate web pages                                                                       |
|                              |                                                            |                                                                                | Learning experiences for the HSC must address:                                              |
|                              |                                                            |                                                                                 | The nature and purpose of placing a call including:                                         |
|                              |                                                            |                                                                                 | • desired outcomes of the call                                                              |
|                              |                                                            |                                                                                 | • research/data to be collected prior to calling                                           |
|                              |                                                            |                                                                                 | • how to determine the most appropriate person to call.                                    |
### Element Performance Criteria

<table>
<thead>
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</tr>
</thead>
<tbody>
<tr>
<td>2.3</td>
<td>Use telephone equipment correctly in order to establish contact.</td>
<td></td>
<td>Learning experiences for the HSC must address:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Operation of telephone systems to place:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• person-to-person calls</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• operator-connected calls</td>
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<td></td>
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<td></td>
<td>• conference calls</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• international calls</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• SMS/text messages.</td>
</tr>
<tr>
<td>2.4</td>
<td>Communicate clearly your name, company and reason for calling.</td>
<td></td>
<td>Learning experiences for the HSC must address:</td>
</tr>
<tr>
<td>2.5</td>
<td>Be polite and courteous at all times</td>
<td></td>
<td>Features of good telephone etiquette:</td>
</tr>
</tbody>
</table>

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

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</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>1</td>
<td>Collecting information from phone calls about name, message and required action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Compiling a list of key contact numbers</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Speaking clearly, concisely and courteously to customers and colleagues</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Recording and relaying messages</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Prioritising phone calls and tasks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preparing for complex or difficult phone calls beforehand</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Making and receiving calls with other colleagues and team members</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Dealing with difficult customers, or where the information requested is not known</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dealing with bomb threats or threatening or abusive phone calls</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using the phone system</td>
</tr>
</tbody>
</table>

Tourism Curriculum Framework  November 2002  THHGGA01B  Communicate on the telephone  39
<table>
<thead>
<tr>
<th>Essential Knowledge and Skills to be Assessed</th>
<th>Critical Aspects of Assessment</th>
<th>Context of Assessment and Resource Implications</th>
<th>Assessment Methods</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| The following skills and knowledge must be assessed as part of this unit:  
  - enterprise practices and procedures for processing documents  
  - layout, format and features of typical business documents  
  - features and usage of typical office equipment  
  - safe work practices for using office equipment and chemicals  
  - communication skills to convey meaning clearly and concisely  
  - basic literacy and written communication skills in relation to workplace documentation and to produce correspondence  
  - basic numeracy in order to count and do simple clerical tasks. | Evidence of the following is critical:  
  - ability to accurately process a range of office documentation within enterprise acceptable timeframes  
  - ability to draft a piece of clear, concise and correct written communication, appropriate to the purpose, audience and situation and free from errors. | Assessment must ensure:  
  - demonstration of office skills within a fully-equipped office environment and using industry-current equipment  
  - demonstration of skills across a complete shift or operating period to address an adequate range of office tasks  
  - performance of office procedures within typical workplace time constraints. | Assessment methods must be chosen to ensure that the performing of clerical procedures can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.  
  The following examples are appropriate for this unit:  
  - review of documents processed or produced by the candidate  
  - project to develop a portfolio of documentation and/or correspondence associated with a particular job, event or project  
  - questions to evaluate selection of appropriate type and format of correspondence for particular audiences, purposes and situations  
  - observation of candidate’s safe and correct usage of office equipment  
  - review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate. | Key Terms and concepts  
  - audience  
  - business documents  
  - confidentiality  
  - correspondence  
  - editing  
  - filing systems  
  - incoming mail  
  - layout  
  - literacy skills  
  - numeracy skills  
  - office equipment  
  - outgoing mail  
  - privacy  
  - proofreading  
  - protocol  
  - written communication |
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Process office documents</td>
<td>1.1 Process documents accurately, in accordance with enterprise procedures and within designated timelines.</td>
<td>This unit applies to all hospitality and tourism operations. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs. Processing of documents may include: • recording receipt or sending of documents • filing (including electronic filing) • mailing (including bulk mailing) • photocopying • faxing • e-mailing • collating • binding. Office documents to be processed may include: • guest mail • customer records • incoming and outgoing correspondence • files • letters • facsimiles • memos • reports • menus • banquet orders • financial records • invoices • receipts.</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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<tr>
<td></td>
<td><strong>1.2 Use office equipment correctly to process documents.</strong></td>
<td><strong>Office equipment may include:</strong>&lt;br&gt;• photocopier&lt;br&gt;• facsimile&lt;br&gt;• computer&lt;br&gt;• paging equipment&lt;br&gt;• calculator&lt;br&gt;• audio-transcribing machine&lt;br&gt;• telephone answering machines.</td>
<td><strong>Learning experiences for the HSC must address:</strong>&lt;br&gt;Selecting appropriate equipment for the task to be undertaken.&lt;br&gt;Checking equipment availability for use by operator.&lt;br&gt;Operating office equipment in accordance with manufacturer’s instructions including:&lt;br&gt;• photocopier&lt;br&gt;• facsimile machine&lt;br&gt;• computer&lt;br&gt;• printer&lt;br&gt;• calculator&lt;br&gt;• telephone&lt;br&gt;• answering machines.</td>
</tr>
<tr>
<td></td>
<td><strong>1.3 Identify, rectify or report office equipment malfunctions promptly, and in accordance with enterprise procedures.</strong></td>
<td></td>
<td><strong>Learning experiences for the HSC must address:</strong>&lt;br&gt;Maintaining equipment in accordance with manufacturer’s instructions.&lt;br&gt;Procedures for reporting faults.</td>
</tr>
<tr>
<td>2 Draft written communication</td>
<td><strong>2.1 Select appropriate format and style for correspondence according to purpose, audience and situation.</strong></td>
<td><strong>Correspondence to be drafted must include a selection from each of the following:</strong>&lt;br&gt;• letters&lt;br&gt;• e-mails&lt;br&gt;• faxes&lt;br&gt;• memos.</td>
<td><strong>Learning experiences for the HSC must address:</strong>&lt;br&gt;The importance of the following skills in written communications:&lt;br&gt;• listening&lt;br&gt;• spelling&lt;br&gt;• grammar&lt;br&gt;• punctuation&lt;br&gt;• proofreading.</td>
</tr>
<tr>
<td>Element</td>
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<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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</tbody>
</table>
| 2.2     | Draft documents according to enterprise formats and protocols. |                | Written correspondence including:  
- handwritten and word-processed letters  
- form letters  
- electronic mail  
- internal memos  
- briefing notes  
- facsimiles  
- receipts  
- customer records  
- general correspondence.  
Learning experiences for the HSC must address:  
Enterprise practices of recording, storing and exchanging written messages quickly and efficiently.  
Forms of correspondence including:  
- acknowledgement  
- confirmation  
- enquiry  
- covering letter. |
| 2.3     | Use clear and concise language appropriate to purpose, audience and situation. |                | Learning experiences for the HSC must address:  
Preparation of correspondence in a style that is:  
- clear  
- concise  
- correct  
- courteous  
- complete  
- targeted to audience. |
| 2.4     | Use correct spelling, punctuation and grammar to ensure understanding by receiver. |                | Learning experiences for the HSC must address:  
Editing and proofreading skills:  
- sources for checking spelling and grammar  
- using electronic spelling and grammar tools. |
| 2.5     | Check information for accuracy prior to sending. |                | Learning experiences for the HSC must address:  
Procedures for checking, correcting, signing and dispatching written information.  
Written correspondence examined for style and format. |
<table>
<thead>
<tr>
<th>Element</th>
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<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Maintain document systems</td>
<td>3.1 File/store documents in accordance with enterprise security procedures.</td>
<td>Office documents to be processed may include:</td>
<td>Learning experiences for the HSC must address:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• guest mail</td>
<td>Storage and security of documents including:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• customer records</td>
<td>• creation and indexing of new files</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• incoming and outgoing correspondence</td>
<td>• backups</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• files</td>
<td>• retrieval and movement of files</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• letters</td>
<td>• updating files</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• facsimiles</td>
<td>• location of filing systems (centralised and non-centralised)</td>
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<td></td>
<td></td>
<td>• memos</td>
<td>• authorised access to hard copy/electronic files</td>
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<td></td>
<td></td>
<td>• reports</td>
<td>• enterprise privacy policy</td>
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<td></td>
<td></td>
<td>• menus</td>
<td>• confidentiality.</td>
</tr>
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<td></td>
<td></td>
<td>• banquet orders</td>
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<td></td>
<td></td>
<td>• financial records</td>
<td>Knowledge of electronic storage systems:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• invoices</td>
<td>• database</td>
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<td></td>
<td></td>
<td>• receipts</td>
<td>• spreadsheets</td>
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<tr>
<td></td>
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<td></td>
<td>• network files.</td>
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<tr>
<td></td>
<td>3.2 Modified and update reference and index systems in accordance with enterprise procedures.</td>
<td></td>
<td>Knowledge of paper-based storage systems:</td>
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<td></td>
<td></td>
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<td>• filing cabinets</td>
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<td>• flat files</td>
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<td>• lever arch files</td>
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<td></td>
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<td>• brochure stands</td>
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<td>• suspension files.</td>
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<td></td>
<td>Knowledge of image-based storage systems:</td>
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<td></td>
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<td>• microfiche</td>
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<td></td>
<td></td>
<td></td>
<td>• microfilm</td>
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<td></td>
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<td>• image database.</td>
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<td></td>
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<td></td>
<td>Filing classifications including:</td>
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<td></td>
<td></td>
<td></td>
<td>• alphabetical</td>
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<td></td>
<td></td>
<td></td>
<td>• numerical</td>
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<td></td>
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<td></td>
<td>• geographical</td>
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<td></td>
<td></td>
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<td>• chronological</td>
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<td></td>
<td></td>
<td></td>
<td>• subject</td>
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<td></td>
<td></td>
<td></td>
<td>• key word.</td>
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<td></td>
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<td></td>
<td>Learning experiences for the HSC must address:</td>
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<tr>
<td></td>
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<td></td>
<td>Locating and extracting specified files from the system and dispatching to the nominated person within designated timelines.</td>
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<td></td>
<td>Maintaining system integrity through updating records.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Following security and confidentiality procedures.</td>
</tr>
</tbody>
</table>
Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>1</td>
<td>Collating and filing documents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Researching simple information so as to complete tasks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Organising information so that it is easily accessible</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>2</td>
<td>Drafting correspondence for different purposes and situations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Adapting communication style to suit different needs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Writing and responding to customers’ correspondence</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Organising and prioritising daily work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Planning details of correspondence to be written</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Working with colleagues in same and other departments or sections</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Communicating with customers, colleagues</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>1</td>
<td>May involve some simple tasks such as counting or calculating quantities of documents, reading financial information and documents</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Dealing with difficult customers, technical problems associated with using equipment</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using communications equipment such as photocopiers, computers and fax machines</td>
</tr>
</tbody>
</table>
**Training Package**
Hospitality (THH02)

**Title:**
Process financial transactions

**Unit Code**
THHGFA01B

**Unit Descriptor:**
This unit deals with the skills and knowledge required to process simple financial transactions in a range of tourism and hospitality contexts. These fundamental skills are essential for many people in a frontline customer service role in a range of tourism and hospitality contexts.

**HSC Indicative Hours:**
15

<table>
<thead>
<tr>
<th>Essential Knowledge and Skills to be Assessed</th>
<th>Critical Aspects of Assessment</th>
<th>Context of Assessment and Resource Implications</th>
<th>Assessment Methods</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following knowledge and skills must be assessed as part of this unit:</td>
<td>Evidence of the following is critical:</td>
<td>Assessment must ensure:</td>
<td>Assessment methods must be chosen to ensure that accurate processing of transactions can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit:</td>
<td>Key terms and concepts</td>
</tr>
<tr>
<td>• basic numeracy skills</td>
<td>• ability to conduct accurate and secure financial transactions</td>
<td>• use of legal tender/industry current processing equipment (eg credit card machines, tills)</td>
<td>• direct observation of the candidate processing financial transactions and balancing takings</td>
<td>• balance</td>
</tr>
<tr>
<td>• procedures for processing different types of transactions</td>
<td>• ability to accurately balance transactions within acceptable enterprise timeframes</td>
<td>• processing of multiple transactions</td>
<td>• review of reconciliation documentation prepared by the candidate</td>
<td>• cash box</td>
</tr>
<tr>
<td>• underpinning principles of the reconciliation/balancing process</td>
<td>• knowledge of security principles and procedures in relation to tender and other financial documentation.</td>
<td>• involvement of others in the transaction process where appropriate to reflect the relevant industry environment (eg multiple customers at a bar)</td>
<td>• written or oral questions to assess knowledge of procedures for cash and/or non-cash transactions</td>
<td>• cash float</td>
</tr>
<tr>
<td>• the role and importance of the reconciliation/balancing process in a broader financial management context</td>
<td></td>
<td>• presence of time-constraints to reflect the relevant industry environment (eg several people waiting to pay their bill).</td>
<td>• review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.</td>
<td>• cash register</td>
</tr>
<tr>
<td>• security procedures for cash and other financial documentation</td>
<td></td>
<td></td>
<td></td>
<td>• cash transactions</td>
</tr>
<tr>
<td>• the nature of GST and how it affects financial transactions in a given industry context.</td>
<td></td>
<td></td>
<td></td>
<td>• credit transactions</td>
</tr>
</tbody>
</table>

**Linkages with Other Units**
This unit underpins a wide range of other operational units. As such, combined training and assessment is recommended based on the specific needs of industry sectors and individual workplaces. There is also a strong link between this unit and the following unit:
• THHGFA02B Maintain financial records
<table>
<thead>
<tr>
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<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Process receipts and payments</td>
<td>1.1 Receive and check cash float accurately where appropriate using correct documentation.</td>
<td>This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances. Transactions may include: • cash • credit cards • cheques • EFTPOS • deposits • advanced payments • vouchers • company charges • refunds • travellers cheques • foreign currency.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.2 Check payments received from the customer and give correct change where appropriate.</td>
<td>Reconciliations may be either manual or electronic. Security procedures may relate to: • the process for taking cash from customers • managing floats (eg when to reduce) • maintaining low levels of cash in tills • rules for when and how cash should be counted • handling customer claims of short change • hold-up procedures.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.3 Prepare and issue accurate receipts including all relevant tax details.</td>
<td>Procedure for receiving cash and cheques, specifically: • cash handling • cash register/terminal/cash box • accuracy • security • authenticity.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Procedure for handling credit cards, specifically: • types of credit cards • electronically processing charges/payments • manually processing charges/payments • security checks</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Procedure for handling company charges: • documentation required • procedure to set up line of credit • information to be confirmed with arriving guest • transfer of charges to city ledger at departure.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Procedure for handling pre-paid travel vouchers: • documentation required • information to be confirmed with arriving guest • confidentiality of room rate for wholesale operators</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
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</tr>
<tr>
<td>1.4</td>
<td>Process and record transactions in accordance with enterprise and financial institution procedures.</td>
<td>• procedure to settle extra charges not covered by voucher • transfer of charges to city ledger at departure. Procedure for handling foreign exchange: • check exchange rate correct • obtain agreement from guest • note AUD rate on foreign currency. EFTPOS transactions. Calculations related to receipts including: • goods and services tax (GST) • discounts • subtotal • total including GST. Preparing and completing receipt documentation.</td>
<td></td>
</tr>
<tr>
<td>1.5</td>
<td>When cash payments are required, check documents and issue cash according to enterprise procedures.</td>
<td>• petty cash vouchers • invoices • credit notes • cheques • credit card vouchers • deposit books • petty cash book • receipts • purchase orders • delivery dockets • travellers cheques. Rectifying financial errors.</td>
<td></td>
</tr>
</tbody>
</table>

Learning experiences for the HSC must address:
A range of financial documents including:
• petty cash vouchers • invoices • credit notes • cheques • credit card vouchers • deposit books • petty cash book • receipts • purchase orders • delivery dockets • travellers cheques.
Recording cash payments including:
• paper-based • electronic.
Procedures for cash payments, specifically:
• cash handling • petty cash • cheque payments • accuracy • security.
<table>
<thead>
<tr>
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<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 1.6     | Conduct transactions using appropriate software applications correctly. |  | Learning experiences for the HSC must address:  
Processing and maintaining electronic financial records including:  
- cash receipts  
- cash payments  
- credit transactions  
- rectifying errors  
- verifying transactions  
- reporting.  
EFTPOS. |
| 1.7     | Conduct transactions to meet enterprise speed and customer service standards. |  | Learning experiences for the HSC must address:  
Establishing good work habits:  
- knowledge of the enterprise’s financial products and services  
- following enterprise practices of processing financial transactions  
- employing courteous and efficient customer service. |
| 2       | Reconcile takings |  | Learning experiences for the HSC must address:  
Operating register/terminal equipment.  
Access and maintenance of cash box.  
Balancing end of day trading including:  
- charges – check docket total is equal to total of computer reading to ensure correct charge has been added to guest account  
- payments – check today’s payments is equal to total of computer reading for all payment methods used  
- completing cashier envelope with shift banking and depositing in enterprise safe  
- checking float to ensure accuracy.  
Adherence to enterprise policy and procedures regarding:  
- handling cash  
- removing taking from register/cash box  
- reading registers/daily takings  
- separating float from takings |
<p>| 2.1     | Perform balancing procedures at the designated times in accordance with enterprise policy and in consultation with colleagues. |  | |
| 2.2     | Where appropriate, separate any cash floats from takings prior to balancing procedure and secure in accordance with enterprise procedures. |  | |
| 2.3     | Determine register/terminal reading or printout accurately where appropriate. |  | |
| 2.4     | Remove payments received and transport in accordance with enterprise security procedures. |  | |
| 2.5     | Count and calculate payments accurately. |  | |
| 2.6     | Determine balance between register/terminal reading and sum of payments accurately. |  | |</p>
<table>
<thead>
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<th>Range Statement</th>
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</tr>
</thead>
</table>
| 2.7     | Investigate or report discrepancies in the reconciliation within scope of individual responsibility. | | • clearing the register  
• processing documentation accurately  
• reconciliation of takings. |
| 2.8     | Record takings in accordance with enterprise procedures. | | Security issues:  
• storing cash on premises  
• banking  
• supporting documentation/evidence of transactions  
• investigation of variances  
• emergency procedures. |

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing</td>
<td>Level 1</td>
<td>Completing a credit card transaction</td>
</tr>
<tr>
<td>Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>Level 1</td>
<td>Informing customers of the correct amount due</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>Level 1</td>
<td>Organising reconciliation of takings</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>Level 1</td>
<td>Liaising with colleagues in relation timing of float replenishment</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>Level 1</td>
<td>Calculating change due to a customer</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>Level 1</td>
<td>Investigating a discrepancy when reconciling takings</td>
</tr>
<tr>
<td>Using Technology</td>
<td>Level 1</td>
<td>Using an electronic till</td>
</tr>
<tr>
<td>Essential Knowledge and Skills to be Assessed</td>
<td>Critical Aspects of Assessment</td>
<td>Context of Assessment and Resource Implications</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>The following knowledge and skills must be assessed as part of this unit:</td>
<td>Evidence of the following is critical:</td>
<td>Assessment must ensure:</td>
</tr>
<tr>
<td>• different sectors of the tourism industry and their inter-relationships, including a general knowledge of the structure, roles and functions of the following sectors:</td>
<td>• ability to source industry information</td>
<td>• project or work activities that allow the candidate to demonstrate the application of knowledge to specific tourism industry contexts and situations.</td>
</tr>
<tr>
<td>− accommodation</td>
<td>• general knowledge of the tourism industry, including main roles, functions and inter-relationships of different sectors, with a more detailed knowledge of issues which relate to a specific sector or workplace.</td>
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<tr>
<td>− attractions and theme parks</td>
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<td>− tour operators</td>
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<td>− tour wholesalers</td>
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<tr>
<td>− retail travel agents</td>
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<tr>
<td>− information services and co-ordination sector (local, regional, national)</td>
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<tr>
<td>− meetings and events.</td>
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<tr>
<td>• major cross-industry and sector-specific organisations.</td>
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<tr>
<td>• overview of quality assurance in the tourism industry and the roles and responsibilities of individual staff members in quality assurance.</td>
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<tr>
<td>• overview of how to organise time and work in different industry contexts.</td>
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<tr>
<td>• tourism industry information sources.</td>
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<tr>
<td>Essential Knowledge and Skills to be Assessed</td>
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<tr>
<td>• basic research skills:</td>
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<td>− identification of relevant information</td>
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<td>− questioning techniques to obtain information</td>
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<tr>
<td>− sorting and summarising information.</td>
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<td>• legislation (both State and Federal) which applies across the industry in the following areas (name, primary objective and impact on individual staff only):</td>
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<tr>
<td>− consumer protection</td>
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<td>− duty of care</td>
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<td>− equal employment opportunity</td>
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<td>− anti-discrimination</td>
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<tr>
<td>− workplace relations.</td>
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<tr>
<td>− child sex tourism</td>
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<tr>
<td>• overview of current and emerging technology used across the tourism industry, including e-business</td>
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<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
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</tbody>
</table>
| 1       | Seek information on the tourism industry | 1.1 Identify sources of information on the tourism industry correctly including information relating to:  
- economic and social significance of the tourism industry and the role of local communities  
- different tourism markets and their relevance to industry sectors  
- relationships between tourism and other industries  
- different sectors of the industry, their inter-relationships and the services available in each sector  
- major tourism industry bodies  
- environmental issues for tourism  
- industrial relations  
- specific features of the local/regional industry  
- career opportunities within the industry  
- the roles and responsibilities of individual staff members in a successful tourism business including ethical practices  
- work organisation and time management  
- quality assurance  
- current and emerging industry technology including e-business. | Information sources and opportunities to update knowledge may include:  
- media  
- reference books  
- libraries  
- unions  
- industry associations and organisations  
- industry journals  
- computer data, including Internet  
- personal observations and experience  
- industry seminars or training courses  
- informal networking.  
Industries other than tourism may include:  
- hospitality  
- entertainment  
- arts  
- sports  
- agriculture  
- conservation  
- science and research  
- retail.  
Economic and social issues may include:  
- employment  
- effect on local amenities/facilities  
- population change due to tourism development  
- community role in tourism.  
Environmental issues may include:  
- protection of natural and cultural integrity  
- minimal impact operations  
- environmental sustainability  
- waste management  
- energy-efficient operations  
- land ownership  
- land access and usage. | Learning experiences for the HSC must address:  
Knowledge of industry sectors:  
- the role and services offered by each sector  
- naming examples of businesses in each sector  
- analysing interrelationships between the sectors.  
Tourism industry sectors namely:  
- accommodation  
- events  
- transportation  
- tour operators  
- tour wholesalers  
- attractions and theme parks  
- retail travel agents  
- information services  
- meetings, incentives, conventions, exhibitions (MICE).  
Identification and differences between the following:  
- domestic tourism  
- international tourism  
- inbound travel  
- outbound travel.  
The range of different motivations for travel including:  
- business travel  
- compassionate travel  
- holiday.  
The economic impact of tourism including:  
- the implications of domestic tourism  
- the multiplier and its flow-on effects from the perspective of any particular sector  
- the implications of international tourism including revenue and employment  
- major unions and employer organisations  
- the relationship between tourism and other industries, specifically hospitality, entertainment, sports and retail.  
The social and environmental effects of tourism including:  
- positive and negative impacts on a community  
- positive and negative impacts on environments  
- the role of environmental guidelines and legislation in the operation of a tourism business. |
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 1.2     | Access and update specific information on relevant sector(s) of work. | The role and functions of key tourism industry bodies including:  
- Australian Tourist Commission  
- Tourism New South Wales  
- Bureau of Tourism Research  
- Tourism Task Force  
- Australian Federation of Travel Agents  
- Meetings Industry Association of Australia  
- National Restaurant and Catering Association  
- Council of Australian Tour Operators  
- Australian Hotels Association  
- Australian Automobile Association.  
Understanding workplace organisation including:  
- role and responsibilities of staff  
- the importance of teamwork  
- career paths and training opportunities  
- unions and employer associations | Learning experiences for the HSC must address:  
Information sources include:  
- product data bases  
- media  
- industry associations  
- industry journals  
- websites  
- publications  
- seminars  
- training courses.  
Procedures of updating information for:  
- computer databases  
- hard copy files. |  |
| 1.3     | Access and use knowledge of the tourism industry in the correct context to enhance the quality of work performance. | Learning experiences for the HSC must address:  
How to access and validate sources of information that are relevant to the tourism industry.  
Importance of updating tourism information in order to:  
- maintain professionalism  
- ensure quality service  
- promote products and services. |  |
<table>
<thead>
<tr>
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<th>Performance Criteria</th>
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</tr>
</thead>
</table>
| 2 Source and apply information on legal and ethical issues which impact on the tourism industry | 2.1 Obtain information on legal and ethical issues to assist effective work performance. | Ethical issues impacting on the industry may relate to:  
- confidentiality  
- commission procedures  
- overbooking  
- pricing  
- tipping  
- familiarisations  
- gifts and services free of charge  
- product recommendations.  
Legal issues which impact on the industry include:  
- consumer protection  
- duty of care  
- equal employment opportunity  
- anti-discrimination  
- workplace relations.  
- child sex tourism.  
Information sources and opportunities to update knowledge may include:  
- media  
- reference books  
- libraries  
- unions  
- industry associations and organisations  
- industry journals  
- computer data, including Internet  
- personal observations and experience  
- industry seminars or training courses  
- informal networking. | Learning experiences for the HSC must address:  
The importance for an enterprise to draft:  
- Code of Conduct guidelines  
- ethics policy  
- privacy policy.  
An understanding of the principles covered by the following legislation:  
- Occupational Health and Safety Act 2000 (NSW)  
- Occupational Health and Safety Regulations (2001) (NSW)  
- Privacy Act 1988 (Cth)  
- Privacy Amendment (Private Sector) Act 2000 (Cth)  
- Equal Employment Opportunity Act 1987 (Cth)  
- Human Rights and Equal Opportunity Commission Act 1986 (Cth)  
- Anti-discrimination Act 1977 (NSW)  
- Child and Young Persons Care and Protection Act 1998 (NSW)  
- Fair Trading Act 1987 (NSW)  
- Trade Practices Act 1974 (Cth)  
- Disability Discrimination Act 1992 (Cth)  
- Smoke-free Environment Act 2000 (NSW). |
| 2.2 Conduct day-to-day activities in accordance with legal obligations and ethical industry practices. |  |
| 3 Update tourism industry knowledge | 3.1 Identify and use a range of opportunities to update general knowledge of the tourism industry. | Information sources and opportunities to update knowledge may include:  
- media  
- reference books  
- libraries  
- unions  
- industry associations and organisations  
- industry journals  
- computer data, including Internet  
- personal observations and experience | Learning experiences for the HSC must address:  
The application of enterprise protocols in relation to Code of Conduct, ethics, privacy and prevailing legislation. |

Information sources including:  
- product data bases  
- media  
- industry associations  
- industry journals  
- websites |
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 3.2     | Monitor current issues of concern to the industry. | Issues of concern to the industry may be related to:  
- government initiatives  
- emerging markets  
- environmental and social issues  
- labour issues  
- industry expansion or retraction.  
Economic and social issues may include:  
- employment  
- effect on local amenities/facilities  
- population change due to tourism development  
- community role in tourism.  
Environmental issues may include:  
- protection of natural and cultural integrity  
- minimal impact operations  
- environmental sustainability  
- waste management  
- energy-efficient operations  
- land ownership  
- land access and usage. |  
- publications  
- seminars  
- training courses.  
Assessing the validity of sources of information. |
| 3.3     | Share updated knowledge with customers and colleagues as appropriate, and incorporate into day-to-day work activities. |  
Learning experiences for the HSC must address:  
The importance of monitoring issues of concern to the tourism industry including:  
- government initiatives  
- emerging markets  
- environmental and social issues  
- labour issues  
- industry expansion or retraction.  
How such issues may impact on the following:  
- economic conditions  
- social conditions  
- the environment. |  
Learning experiences for the HSC must address:  
Effective communication skills including:  
- active listening  
- questioning techniques  
- body language  
- language targeted to audience.  
Disseminating information through a variety of channels including:  
- direct mail  
- seminars  
- corporate websites/e-newsletters  
- call centre  
- one-on-one communication. |
### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>2</td>
<td>Deciding whether to join an industry association based on promotional materials</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Liaising with colleagues from other industry sectors to meet a particular customer request</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Organising a personal program of professional development activities for the upcoming year</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Discussing industry events with colleagues</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Responding to a situation which involves dealing with a sector of the industry of which you have limited knowledge</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using the Internet to source information on the tourism industry</td>
</tr>
</tbody>
</table>

HSC Requirements and Advice:

- How sharing information can improve:
  - promotion of enterprise products and services
  - customer service.

The benefits of sharing ideas and discussing with colleagues and customers issues of current importance to the tourism industry.
## Training Package

**Title:** Source and provide destination information and advice

**Unit Code:** THTSOP02B

This unit deals with the skills and knowledge required to source and provide destination information and advice including general product information (e.g., what types of product the destination can offer). More specific and detailed product knowledge is covered in the unit THTSOP03B Access and interpret product information and selling skills are covered by the unit THTSOP04B Sell tourism products and services. This unit may be applied in a domestic or international context and is relevant for staff across multiple tourism sectors. The essential knowledge base for this unit will vary according to the tourism sector and local industry needs, and it is vital that any training take account of these. Funding and hours allocated to training must reflect the breadth and depth of knowledge required to meet the requirements of specific industry sectors and local tourism industry employers.

### Essential Knowledge and Skills to be Assessed

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

- sources of information on destinations
- knowledge of industry information networks
- fundamental research skills
- ways that individuals update their knowledge in the tourism industry, including Internet
- understanding of the ways in which customers seek information
- destination knowledge as appropriate to the sector or specific workplace.

### Critical Aspects of Assessment

Evidence of the following is critical:

- ability to research current, relevant and accurate information on tourism destinations and the styles of product offered in those destinations
- knowledge of current industry information networks and sources.

### Context of Assessment and Resource Implications

Assessment must ensure:

- demonstration of skills in sourcing and providing destination information and advice to meet multiple and different customer needs (ideally as a component of integrated work activity).
- demonstration of skills within a fully-equipped industry-realistic office environment using appropriate computers, printers, information programs and publications
- sourcing and provision of information and advice within timeframes and constraints that reflect typical industry practice.

### Assessment Methods

Assessment methods must be chosen to ensure that the skills required to source and provide a range of destination information and advice can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- direct observation of the candidate providing advice to customers
- evaluation of integrated activities completed by the candidate (may include destinations, products, quotations and ticketing)
- case studies/problem solving activities to assess ability to respond to different customers
- destination research activities for different customer scenarios
- written and oral questioning or interview to test knowledge of information sources and destination features
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

### Linkages with Other Units

This unit has strong linkages to the range of Sales and Office Operations units. It underpins effective performance in a range of sales and operational activities and combined training and assessment is strongly recommended. Depending on the industry sector or enterprise context, this unit could be assessed with:

### Key Terms and Concepts

- channels of communication
- customer information needs
- customer service
- destination features
- effective communication
- familiarisations (famils)
- feedback
- formal research
- informal research
- information storage systems
- local area (LGA/LTA)
- primary research
- product information
- product launch
- product type
- regional destination
- secondary research
- sources of information
- tourism authority information system
- town
- trade seminars.
<table>
<thead>
<tr>
<th>Linkages with Other Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>- THTSOP01B  Operate an automated information system</td>
</tr>
<tr>
<td>- THTSOP04B  Sell tourism products and services</td>
</tr>
<tr>
<td>- THTSOP05B  Prepare quotations</td>
</tr>
<tr>
<td>- THTSOP06B  Receive and process reservations</td>
</tr>
<tr>
<td>- THTSOP07B  Book and coordinate supplier services</td>
</tr>
<tr>
<td>- THTSOP09B  Process non air documentation</td>
</tr>
<tr>
<td>- THTSOP15B  Process and monitor meeting/event registrations</td>
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<tr>
<td>Element</td>
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<td>Element</td>
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</tbody>
</table>
| 1.2     | Obtain information on features of the destination and the general style of tourism products available. | General product information may be found in:  
- brochures  
- sales kits  
- supplier information kits  
- product manuals  
- advertising fliers. | **Learning experiences for the HSC must address:**  
 Sources of general product information including:  
- product launches  
- sales kits  
- supplier information kits, advertisements, brochures and web sites  
- product manuals.  
 Destination features including:  
- geographic, climatic and seasonal features  
- local economy, banking and currency information  
- local customs and cultural elements  
- local facilities and tourist areas  
- local health issues and facilities for customers with special needs  
- local products available. |
| 1.3     | Identify and obtain information on different tourism products available which can meet different customer needs. | General product information may include:  
- styles of product available within the destination  
- seasonal availability of product  
- location of product within the destination. | **Learning experiences for the HSC must address:**  
 Tourism products classified by:  
- type of product  
- seasonal availability  
- location within the destination.  
 Types of product including:  
- accommodation  
- events  
- attractions  
- tours  
- visitor services. |
| 1.4     | Record and store information for future use in accordance with enterprise systems. | Storage of destination information may include:  
- card reference systems  
- files and notes of particular destinations  
- files and notes for specific touring routes or locations  
- files and notes for specific styles of customer group  
- computerised database of information. | **Learning experiences for the HSC must address:**  
 Storing and accessing information resources including:  
- creation and indexing resources  
- electronic or hard copy backups  
- updating files and resource information  
- location of resources/filing systems.  
 Storage systems including:  
- card file  
- data base  
- brochure racks  
- compactus. |
<table>
<thead>
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<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 2       | Update destination knowledge | 2.1 Use informal and formal research to update destination and general product knowledge. | Informal and formal research may include:  
- informal discussions with colleagues  
- formal study  
- reading of brochures  
- trade and general media  
- product updates and launches  
- promotional seminars  
- direct contact with other organisations  
- familiarisations  
- reading of travel guide books  
- accessing the Internet  
- personal on site observation/exploration  
- organising information from own memory and experiences  
- watching TV, videos and films  
- listening to radio  
- reading newspapers, books and other references. | Filing classifications including:  
- alphabetical  
- numerical  
- geographical  
- chronological  
- subject  
- key word.  

Maintaining system integrity through updating records.  
Following enterprise security and confidentiality procedures.  

Learning experiences for the HSC must address:  
Conducting research to update destination and general product knowledge of the following:  
- region/town/area  
- accommodation  
- events  
- attractions  
- tours  
- visitor services.  

Types of research:  
- formal research  
- informal research.  

Sources of information including:  
- formal training  
- trade and general media  
- product updates and launches  
- trade seminars  
- direct contact with other organisations  
- familiarisations (famils)  
- accessing the Internet, newspapers and brochures  
- personal on-site observation/exploration.  

Learning experiences for the HSC must address:  
A range of methodologies for obtaining customer feedback:  
- feedback forms  
- follow-up emails  
- focus groups  
- call centres  
- Internet message boards/chat rooms. |
<p>| 2       | 2.2 Seek feedback on experience with destinations from both colleagues and customers and provide this to other organisations where appropriate. | | |</p>
<table>
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</tr>
</thead>
</table>
| 2.3     | Share updated information with colleagues in accordance with enterprise procedures. | A range of methodologies for obtaining industry/colleague feedback:  
- industry familiarisations (famils)  
- message boards  
- trade seminars.  
Assessing the validity of feedback and judging the value of referring this information to other organisations.  
Disseminating feedback to other organisations through a variety of channels including:  
- direct mail  
- trade seminars  
- corporate websites/e-newsletters  
- one-on-one communication. | Learning experiences for the HSC must address:  
Effective communication skills including:  
- active listening  
- questioning techniques  
- body language  
- language targeted to audience.  
Disseminating information through a variety of communication channels including:  
- team meetings  
- trade seminars  
- corporate websites/e-newsletters  
- one-on-one communication.  
How sharing information can improve:  
- promotion of enterprise products and services  
- customer service.  
The benefits of informing colleagues of new or revised destination knowledge. |
| 3       | Provide destination information and advice  
3.1     | Accurately identify the specific information and advice needs of the customer. | | |
<table>
<thead>
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</tr>
</thead>
</table>
| 3.2     | Provide a range of current and accurate destination and general product information and advice in a timely manner and in accordance with enterprise procedures. | Destination knowledge may include:  
  - major tourist areas  
  - geographic features  
  - history  
  - local economy  
  - local customs  
  - special regional features  
  - cultural elements  
  - special features of the host community  
  - appropriate health and safety considerations  
  - climate and seasonal factors  
  - local facilities  
  - banking, currency information  
  - facilities for customers with special needs.  
Sources of destination information may include:  
  - destination and product library of the enterprise  
  - Internet  
  - state government tourism authority information systems  
  - national government tourism authority information systems  
  - international government tourism authority information systems.  
General product information may be found in:  
  - brochures  
  - sales kits  
  - supplier information kits  
  - product manuals  
  - advertising fliers.  
General product information may include:  
  - styles of product available within the destination  
  - seasonal availability of product  
  - location of product within the destination. | Learning experiences for the HSC must address:  
Destination knowledge including:  
  - major tourist areas  
  - geographic features  
  - history  
  - local economy  
  - local customs  
  - special regional features  
  - cultural elements  
  - special features of the host community  
  - appropriate health and safety considerations  
  - climate and seasonal factors  
  - local facilities  
  - banking, currency information  
  - facilities for customers with special needs.  
Product knowledge of the following:  
  - region/town/area  
  - accommodation  
  - events  
  - attractions  
  - tours  
  - visitor services.  
Tourism products classified by:  
  - type of product  
  - seasonal availability  
  - location within the destination. |
| 3.3     | Ensure that the scope and depth of the information are appropriate to customer needs. | Learning experiences for the HSC must address:  
Establishing the scope and depth of the information required by the customer through:  
  - questioning and active listening techniques  
  - summarising and clarifying customer needs  
  - recording details as necessary. |
### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

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<tr>
<td>Collecting, Organising and Analysing</td>
<td>2</td>
<td>Determining what information is needed, establishing the correct source of the information and accessing the required information</td>
</tr>
<tr>
<td>Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Correctly interpreting the range of products available at a destination explaining this to a customer during sales activities</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Prioritising the order of destination information to be accessed according to the deadline of the information requirement</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Sharing newly accessed destination information with colleagues who also need to provide advice</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>1</td>
<td>Estimating travel times to, from and within destinations</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Conducting further searches when information on a requested destination cannot be initially found</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using a computerised information system. Using faxes and email systems to source information</td>
</tr>
</tbody>
</table>

### Questioning techniques:

- Open questions
- Closed questions
- Reflective questions

### Establishing good customer service practices including:

- Knowledge of destination information
- Prompt response to customer enquiries
- Language that is targeted to the specific customer
- Friendly and courteous manner
- Positive gestures and body language
- Solutions-oriented approach.

### Learning experiences for the HSC must address:

- Pros and cons of presenting information in the following formats:
  - Written
  - Verbal
  - Gestures.
- Presenting information through a variety of communication channels including:
  - Direct mail
  - Trade seminars
  - Corporate websites/e-newsletters
  - Telephone
  - One-on-one communication.
<table>
<thead>
<tr>
<th>Training Package</th>
<th>Tourism (THT02)</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title:</td>
<td>Access and interpret product information</td>
<td></td>
</tr>
<tr>
<td>Unit Code</td>
<td>THTSOP03B</td>
<td></td>
</tr>
</tbody>
</table>

**HSC Indicative Hours:** 35

**Unit Descriptor:**
This unit deals with the skills and knowledge required to access and interpret specific tourism product information. Tourism personnel need to correctly interpret product information to fulfil a range of sales and operational activities such as selling tourism products and issuing documentation. This unit does not cover detailed interpretation of airfare information. This is covered by the range of airfare units: THTSOP19A Construct domestic airfares, THTSOP20A Construct normal airfares, THTSOP21A Construct promotional airfares and THTSOP13B Apply advanced airfares rules and procedures.

### Essential Knowledge and Skills to be Assessed

The following knowledge and skills must be assessed as part of this unit:
- sources of tourism product information
- major categories of tourism products and services
- industry terminology and common abbreviations in relation to major product categories
- use of the 24 hour clock
general procedures in relation to major product categories
- specific legal issues relating to different product categories.

### Critical Aspects and Assessment

Evidence of the following is critical:
- ability to access and correctly interpret information on different categories of tourism products within enterprise acceptable timeframes.
- knowledge of product terminology and procedures (the range of products will vary according to the industry sector and workplace).

### Context of Assessment & Resource Implications

Assessment must ensure:
- demonstration of skills in accessing and interpreting product information to meet multiple and differing customer needs (ideally as a component of integrated work activity)
- demonstration of skills within a fully-equipped industry-realistic office environment using appropriate computers, printers, information programs and publications
- accessing and interpretation of information within timeframes and constraints that reflect typical industry practice.

### Linkages with Other Units

This unit has strong linkages to the range of Sales and Office Operations units. It underpins effective performance in a range of sales and operational activities and combined training and assessment is strongly recommended. Depending on the industry sector or enterprise context, this unit could be assessed with:

### Assessment Methods

Assessment methods must be chosen to ensure that the skills required to access and interpret a range of product information can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:
- evaluation of integrated activities completed by the candidate (may include destinations, products, quotations and ticketing)
- case studies to assess ability to obtain current, accurate and relevant destination and product information for particular purposes and contexts
- evaluation of product research activities and information presentations
- review of product options prepared by the candidate to meet differing customer needs
- written and oral questioning or interview to test knowledge of the sources of product information and various product features.

### Key Terms and Concepts

- audiovisual equipment
- booking conditions
- booking and confirmation procedures
- brochures, promotional materials such as videos, CD-ROM
- cancellation and amendment procedures
- commercial agreements
- computerised reservations system (CRS)
- costings
- deposit and final payment conditions
- enterprise policy
- 24-hour clock
- inclusions
- industry incentives
- internet product sites
- inventory control database
- legal obligations
- 3-letter city codes
- 2-letter operator codes
- optional or add-on offers
- product codes
- rates
<table>
<thead>
<tr>
<th>Linkages with Other Units</th>
<th>Assessment Methods</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>• THTSOP01B Operate an automated information system</td>
<td>• review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.</td>
<td>• room configuration types</td>
</tr>
<tr>
<td>• THTSOP02B Source and provide destination information and advice</td>
<td></td>
<td>• specifications of service providers</td>
</tr>
<tr>
<td>• THTSOP04B Sell tourism products and services</td>
<td></td>
<td>• tariffs</td>
</tr>
<tr>
<td>• THTSOP05B Prepare quotations</td>
<td></td>
<td>• taxes.</td>
</tr>
<tr>
<td>• THTSOP06B Receive and process reservations</td>
<td></td>
<td></td>
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<tr>
<td>• THTSOP07B Book and co ordinate supplier services</td>
<td></td>
<td></td>
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<tr>
<td>• THTSOP08B Operate a computerised reservations system</td>
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<tr>
<td>• THTSOP09B Process non air documentation</td>
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<td></td>
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<tr>
<td>• THTSOP15B Process and monitor meeting/event registrations</td>
<td></td>
<td></td>
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<tr>
<td>• THTSOP16B Maintain a product inventory</td>
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</tbody>
</table>

Where the skills and knowledge required to access and interpret product information is an underpinning requirement to other Sales and Operations units, this unit is specifically mentioned in those units.
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Identify and access product information</td>
<td>1.1 Identify and access sources of product information.</td>
<td>This unit applies to all tourism industry sectors and enterprises where product information must be accessed and interpreted to fulfil sales and operational requirements. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Product information systems may be:</td>
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<td></td>
<td></td>
<td></td>
<td>• manual</td>
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<td></td>
<td></td>
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<td>• computerised.</td>
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<td></td>
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<td></td>
<td>Sources of product information may include but are not limited to:</td>
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<td></td>
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<td></td>
<td>• the principal or supplier of the product</td>
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<td></td>
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<td></td>
<td>• product library of the enterprise</td>
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<td></td>
<td>• Internet</td>
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<td>• enterprise designed information systems eg inventory control database</td>
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<td></td>
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<td>• state government tourism authority information systems</td>
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<td>• national government tourism authority information systems</td>
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<td>• international government tourism authority information systems</td>
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<td></td>
<td>• central reservations systems (CRS).</td>
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<td></td>
<td>Specific product information may be found in:</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• brochures</td>
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<td></td>
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<td></td>
<td>• timetables</td>
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<td></td>
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<td>• tariff sheets</td>
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<td></td>
<td></td>
<td></td>
<td>• confidential tariff</td>
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<td></td>
<td></td>
<td></td>
<td>• sales kits</td>
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<td></td>
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<td>• supplier information kits</td>
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<td></td>
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<td></td>
<td>• product manuals</td>
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<td></td>
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<td></td>
<td>• advertising fliers</td>
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<td></td>
<td></td>
<td></td>
<td>• manufacturer’s specifications.</td>
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<td>Learning experiences for the HSC must address:</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Identifying and accessing sources of information including:</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• manual or automated information and reservations systems</td>
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<td></td>
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<td>• brochures or fliers</td>
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<td>• product manuals</td>
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<td>• timetables</td>
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<td>• schedules</td>
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<td>• tariff sheets</td>
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<td></td>
<td></td>
<td>• confidential tariff contracts</td>
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<td></td>
<td></td>
<td></td>
<td>• internet product websites</td>
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<td></td>
<td>• product videos and CD-ROMs</td>
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<td></td>
<td></td>
<td></td>
<td>• overseas government tourism authorities</td>
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<td>• state government tourism authorities</td>
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<td></td>
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<td></td>
<td>• local community tourism authorities.</td>
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<td></td>
<td>Identifying and accessing the wide range of tourism product available including:</td>
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<td></td>
<td></td>
<td>• coach transportation</td>
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<td></td>
<td></td>
<td></td>
<td>• rail networks</td>
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<td></td>
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<td></td>
<td>• vehicle rental</td>
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<td></td>
<td></td>
<td>• cruising/shipping</td>
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<td></td>
<td></td>
<td></td>
<td>• accommodation</td>
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<td></td>
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<td>• package tours</td>
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<td></td>
<td></td>
<td></td>
<td>• sightseeing tours</td>
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<td></td>
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<td></td>
<td>• natural and man-made attractions</td>
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<td>• special events</td>
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<td></td>
<td>• recreational/entertainment facilities</td>
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<td>• meeting/convention facilities</td>
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<td></td>
<td>• food and beverage</td>
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<td></td>
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<td></td>
<td>• banking/currency facilities</td>
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<td></td>
<td>• travellers cheques/access to funds</td>
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<td></td>
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<td></td>
<td>• passport and visa applications</td>
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<td>• international driving permits</td>
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<td></td>
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<td>• travel insurance</td>
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<td>• special offers</td>
</tr>
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<td></td>
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<td></td>
<td>• industry incentives.</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
</tr>
<tr>
<td>---------</td>
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<td>-----------------------------</td>
</tr>
<tr>
<td>1.2</td>
<td>Select appropriate sources in accordance with enterprise policy, commercial agreements and specific needs.</td>
<td>Sources of product information may include but are not limited to:  • the principal or supplier of the product  • product library of the enterprise  • Internet  • enterprise designed information systems eg inventory control database  • state government tourism authority information systems  • national government tourism authority information systems  • international government tourism authority information systems  • central reservations systems (CRS).</td>
<td><strong>Learning experiences for the HSC must address:</strong> How to identify and access product information sources including:  • product brochures and fliers  • internet product sites  • confidential tariff contracts  • local community tourism authority information systems  • state government tourism authority information systems  • national government tourism authority information systems  • international government tourism authority information systems  • manual and computerised reservations systems (CRS).</td>
</tr>
<tr>
<td>1.3</td>
<td>Source specific product information to meet the particular sales or operational need.</td>
<td>Specific product information may be found in:  • brochures  • timetables  • tariff sheets  • confidential tariff  • sales kits  • supplier information kits  • product manuals  • advertising fliers  • manufacturer’s specifications.  Specific details about the product may include:  • costs/tariffs/rates  • conditions and rules  • scheduling information  • product codes  • booking procedures  • point of departure  • touring inclusions and exclusions  • technical specifications for audio visual and other meetings and events equipment  • specifications for products to be branded with corporate details. The particular sales or operational need may include:  • providing destination information and advice  • selling tourism products to the customer  • preparing quotations  • booking and co-ordinating a supplier services for the customer.</td>
<td><strong>Learning experiences for the HSC must address:</strong> Identifying and accessing specific client product information sources including:  • brochures or fliers  • product manuals  • timetables  • schedules  • tariff sheets  • confidential tariff contracts  • internet product sites  • product videos and CD-ROMs. Understanding and identifying a range of product details required to respond to sales or operational needs including:  • product validity and availability  • gross and net costs per person  • applicable taxes  • special offers or promotional discounts  • tariffs/rates  • seasonal price variations  • departure dates  • schedules and timetables  • price inclusions  • optional or add-on offers  • booking conditions and legal obligations  • cancellation or amendment procedures  • deposit and final payment conditions  • product codes.</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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<tr>
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</tr>
</tbody>
</table>
| 2 Interpret product information | 2.1 Interpret general and/or brochure information and apply this to meet the particular sales or operational need. | • receiving and processing a reservation from a customer  
• processing financial transactions  
• issuing non air documentation  
• organising functions  
• processing and monitoring meeting or event registrations  
• purchasing promotional products  
• hiring special equipment. | • booking and confirmation procedures.  
An understanding of the overall process of providing information to clients including:  
• responding to client’s initial request for product information and advice  
• preparing quotation for product selected  
• booking and confirming client reservation either manually or via a computerised reservations system (CRS)  
• processing deposit and final payments  
• issuing tickets or vouchers  
• monitoring supplier arrangements eg for conferences or conventions. |

Products and services offered within the tourism industry are diverse. Some examples of products and services are:  
• transportation  
• transfers  
• accommodation  
• entertainment  
• tours  
• cruises  
• entrance to attractions or sites  
• tourist guiding services  
• activities  
• meals  
• functions  
• special items with customer’s corporate branding  
• special events  
• venue facilities  
• convention facilities  
• speaker services  
• audiovisual services  
• meeting or event equipment  
• special event consumable items  
• food and beverage/catering  
• currency and banking services |

An overview of the wide range of products and services within the tourism industry including:  
• coach services  
• rail transport  
• shipping and cruising  
• meet-and-greet services  
• coach or car transfers  
• accommodation services  
• vehicle rentals  
• tour packages  
• special interest tours  
• travel insurance  
• sporting or entertainment tickets  
• attractions (natural and man-made), sightseeing tours and entrance tickets  
• meal or restaurant bookings  
• tour guiding services  
• speaker services  
• conference and convention bookings  
• meeting or special event bookings and equipment  
• passport and visa assistance and advice  
• international driving permits assistance and advice  
• medical and health requirements assistance and advice  
• travellers cheques and access to funds assistance and advice. |

Specific product information may be found in:  
• brochures  
• timetables  
• tariff sheets  
• confidential tariff  
• sales kits |

Learning experiences for the HSC must address:  
Interpreting specific client product information including:  
• brochures or fliers  
• product manuals |
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2</td>
<td>Interpret specific details about the product and accurately apply this to meet the particular sales or operational need.</td>
<td>Specific details about the product may include: costs/tariffs/rates, conditions and rules, scheduling information, product codes, booking procedures, point of departure, touring inclusions and exclusions, technical specifications for audio visual and other meetings and events equipment, specifications for products to be branded with corporate details.</td>
<td>Learning experiences for the HSC must address: Interpreting specific product details including: product validity and availability, gross and net costs per person, applicable taxes, special offers or promotional discounts, tariffs/rates, seasonal price variations, departure dates, schedules and timetables, price inclusions, optional or add-on offers, booking conditions and legal obligations, cancellation or amendment procedures, deposit and final payment conditions, product codes.</td>
</tr>
<tr>
<td>2.3</td>
<td>Interpret any special jargon or specifications used in product information and accurately apply this to meet the particular sales or operational need.</td>
<td>Special jargon or specifications may include: industry terminology, common abbreviations applied in the tourism industry, use of the 24 hour clock, technical capacity of equipment.</td>
<td>Learning experiences for the HSC must address: Interpreting industry terminology and jargon including: use of 24-hour clock, use of 3-letter city codes, use of 2-letter operator codes, use of room configuration types, use of common abbreviations in each tourism product sector.</td>
</tr>
</tbody>
</table>
**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment. Level 1 = Perform  
Level 2 = Administer and Manage  
Level 3 = Design and Evaluate

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>2</td>
<td>Determining what product information is needed, establishing the correct source of the information system and accessing the required information</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Correctly interpreting industry jargon and explaining this to a customer during sales activities</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Prioritising the order of product information to be accessed according to the deadline of the information requirement</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Sharing newly accessed product information with colleagues who also need to access product information</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>1</td>
<td>Checking the costs of products and comparing these to other products to estimate the best fit for a customer sale</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Conducting further searches when information on a requested product cannot be initially found</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using a computerised information system</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Using faxes and email systems to source information</td>
</tr>
</tbody>
</table>
### Essential Knowledge and Skills to be Assessed

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

- any legal issues which impact on the sale of products and services
- in-depth knowledge of enterprise products and services
- general knowledge of the market for different types of products and services
- knowledge of different customer preferences and needs, and ways of meeting requirements, both stated and unstated
- the role of frontline staff in maximising business performance through effective up-selling and promotion
- the ways in which different hospitality and tourism businesses present and promote products
- up-selling and suggestive selling techniques.

### Critical Aspects of Assessment

Evidence of the following is critical:

- ability to use selling techniques to promote products and services within a specific tourism or hospitality context
- knowledge of different customer preferences and ways to meet both stated and unstated requirements.

### Context of Assessment and Resource Implications

Assessment must ensure:

- demonstration of skills whilst undertaking normal job tasks eg up-selling whilst providing food and beverage service, promoting the hotel or park restaurant whilst at reception, advising guests of special features or events whilst issuing tickets to a theme park or other attraction, or promoting through the development of menus or ‘specials’ or other special products or service interaction with different customers to allow the candidate to respond to a range of requirements.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

### Assessment Methods

Assessment methods must be chosen to ensure that promoting products and services can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- direct observation of the candidate promoting products and services to customers
- oral or written questions to determine product knowledge
- case studies to test knowledge of appropriate products and services for different contexts, customers and situations
- role plays in which the candidate demonstrates up-selling techniques
- projects to develop menus, promotional ideas or suggestions for a particular product or service
- project to research customer preferences for a particular enterprise or context
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Terms and Concepts:

- customer
- expectation
- Fair Trading Act 1987 (NSW)
- feedback
- formal research
- frontline staff
- informal research
- need
- optional services
- preference
- product
- product and service knowledge
- promotion
- selling technique
- service
- service operator
- side trips
- suggestive selling
- Trade Practices Act 1974 (Cth)
- up-selling.

---

**Unit Code**: THHGCS02B

**Unit Descriptor**: This unit deals with the skills and knowledge required to promote products and services to customers. It relates to situations where the sales function is not the primary focus of work activity. It applies to those employees who deal with customers and whose job provides the opportunity to promote products and services and to ascertain changes in customer preferences eg waiters, housekeepers, attraction attendants, receptionists. This unit has a link to unit THTSOP04B Sell tourism products and services, where this sales function is a primary focus of work activity.

**HSC Indicative Hours**: 10
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Develop and maintain product/service and market knowledge</td>
<td>Identify opportunities to develop product/service knowledge.</td>
<td>This unit applies tourism and hospitality operations where employees have contact with customers and are expected to promote products and services. It may apply to all situations where the opportunity to sell or promote products and services is available and may include selling and promoting through face-to-face contact or through the contribution to the development of marketing activities such as menus and special offers. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. Product/service knowledge may relate to: - general features - special features - benefits - disadvantages - price - special offers - availability - how to purchase or order.</td>
</tr>
<tr>
<td>1.1</td>
<td>Use informal and formal research to update knowledge.</td>
<td>Informal and formal research may include: - discussions with colleagues - reading enterprise information - research of product and service information brochures - general media. - surveying, distributing questionnaires.</td>
<td>Learning experiences for the HSC must address: Strategies including: - reading enterprise information - attending operators’ product update seminars - visiting exhibitions and product trade shows - inspecting products and services - monitoring trade and consumer media - researching and analysing product brochures - observing industry practices - sharing knowledge with colleagues.</td>
</tr>
<tr>
<td>1.2</td>
<td>Use customer feedback and workplace observation to evaluate products, services and promotional initiatives.</td>
<td>Products, services and promotional initiatives may include: - tours and transport - conferences and conventions - function facilities - entertainment</td>
<td>Learning experiences for the HSC must address: Products, services and promotional initiatives including: - meet-and-greet services - transfers to/from service purchased.</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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<td></td>
<td></td>
<td>shopping services</td>
<td>upgrade opportunities</td>
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<td></td>
<td>restaurant facilities</td>
<td>add-on services</td>
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<td></td>
<td></td>
<td>food and beverage</td>
<td>optional services</td>
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<tr>
<td></td>
<td></td>
<td>‘add-on’ services</td>
<td>side trips</td>
</tr>
<tr>
<td></td>
<td></td>
<td>special offers or packages.</td>
<td>meal or beverage vouchers</td>
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<td></td>
<td></td>
<td></td>
<td>shopping vouchers</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>advance purchase discounts</td>
</tr>
<tr>
<td>1.4</td>
<td>Share knowledge obtained with colleagues to enhance the sales-effectiveness of the team.</td>
<td></td>
<td>special offers or promotions</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>industry incentives.</td>
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<td></td>
<td>Using various media to establish customer feedback including:</td>
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<td></td>
<td></td>
<td>• client questionnaires</td>
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<td>− suggestions for improvements</td>
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<td></td>
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<td>− positive feedback</td>
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<td></td>
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<td></td>
<td>• questioning techniques to establish customer satisfaction.</td>
</tr>
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<td></td>
<td>Learning experiences for the HSC must address:</td>
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<td>Learning experiences for the HSC must address:</td>
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<tr>
<td></td>
<td>How sharing information can improve:</td>
<td></td>
<td>How sharing information can improve:</td>
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<tr>
<td></td>
<td>• promotion of enterprise products and services</td>
<td></td>
<td>• promotion of enterprise products and services</td>
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<td></td>
<td>• customer service</td>
<td></td>
<td>• customer service</td>
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<td></td>
<td>• extra sales of add-on or optional services.</td>
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<td>• extra sales of add-on or optional services.</td>
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<tr>
<td></td>
<td>The benefits of sharing ideas and discussing with colleagues issues of importance to the tourism industry.</td>
<td></td>
<td>The benefits of sharing ideas and discussing with colleagues issues of importance to the tourism industry.</td>
</tr>
<tr>
<td>1.5</td>
<td>Pass information gained from workplace experience and direct customer contact to the appropriate person for consideration in future planning.</td>
<td></td>
<td>Learning experiences for the HSC must address:</td>
</tr>
<tr>
<td></td>
<td>Personnel to whom information should be passed including:</td>
<td></td>
<td>Personnel to whom information should be passed including:</td>
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<td></td>
<td>• immediate supervisor</td>
<td></td>
<td>• immediate supervisor</td>
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<td></td>
<td>• department manager</td>
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<td>• department manager</td>
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<tr>
<td></td>
<td>• sales and marketing department.</td>
<td></td>
<td>• sales and marketing department.</td>
</tr>
<tr>
<td>1.6</td>
<td>Identify changes in customer preferences, needs and expectations.</td>
<td>Customer preferences, needs and expectations may be related to:</td>
<td>Customer preferences, needs and expectations may be related to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• age</td>
<td>• age</td>
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<td></td>
<td></td>
<td>• gender</td>
<td>• gender</td>
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<td></td>
<td></td>
<td>• prior knowledge</td>
<td>• prior knowledge</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• special needs.</td>
<td>• special needs.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Customer preferences, needs and expectations may include:</td>
<td>Customer preferences, needs and expectations may include:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• friendliness</td>
<td>• friendliness</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• courtesy</td>
<td>• courtesy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• value for money</td>
<td>• value for money</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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</tr>
</tbody>
</table>
| 1.7     | Suggest ideas for product and service adjustments to meet customer needs to the appropriate person in accordance with enterprise policy. | • prompt service  
• assistance  
• empathy and support  
• comfort  
• new experience  
• basic needs for food, comfort, shelter or other services. | *Learning experiences for the HSC must address:*  
Establishing customer preferences, needs and expectations through active listening and using:  
• open questions  
• closed questions  
• reflective questions.  
Establishing customers’ preferences, needs and expectations through observation and recognition of non-verbal body language and signs.  
Customer preferences, needs and expectations including:  
• friendliness  
• courtesy  
• value for money  
• prompt service  
• assistance  
• empathy and support  
• comfort  
• new experiences  
• basic needs for food, comfort, shelter or other services.  
Matching the preferences, needs and expectations with the most suitable product or service including:  
• knowing your customer  
  – families  
  – corporate customers  
  – FIT (free independent travellers)  
  – customers with special interests  
  – female customers  
  – customers with special needs including disabilities, cultural or religious preferences |
<table>
<thead>
<tr>
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<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 2.2     | Offer accurate information about products and services to customers. | Products, services and promotional initiatives may include:  
- tours and transport  
- conferences and conventions  
- function facilities  
- entertainment  
- shopping services  
- restaurant facilities  
- food and beverage  
- ‘add-on’ services  
- special offers or packages.  
Product/service knowledge may relate to:  
- general features  
- special features  
- benefits  
- disadvantages  
- price  
- special offers  
- availability  
- how to purchase or order. | – international customers  
- knowing your range of products and types of services. |

Learning experiences for the HSC must address:  
Awareness of legal issues which impact on the sale of products and services including:  
- *Fair Trading Act 1987 (NSW)*  
Accurate enterprise information including rates, range and type of services, destination information and methods of payment and documentation information for products including:  
- coach transportation  
- rail services  
- airlines  
- sightseeing services  
- rental vehicles  
- shipping or cruising  
- accommodation services  
- conference and convention facilities  
- tour packages  
- travel insurance.
<table>
<thead>
<tr>
<th>Element</th>
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<th>Range Statement</th>
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</tr>
</thead>
</table>
| 2.3     | Employ selling techniques appropriately to encourage usage and purchase. | Selling techniques include up-selling and suggestive selling and may involve:  
- serving  
- helping  
- advising  
- building rapport with customers  
- arousing interest. | Learning experiences for the HSC must address:  
Selling strategies and techniques including:  
- up-selling  
  - advising customer of alternative information on products and services that may result in the sale of a more expensive or upgraded product with benefits to both the enterprise and the customer  
- top down  
  - describing features and benefits from the most expensive down  
- offering alternatives  
  - providing information on a range of products and services and asking for customer’s preference  
- suggestive selling  
  - providing information regarding additional services and products to customer  
- selling of benefits to customer  
  - highlighting features and benefits of particular products and services to match customers needs.  
Closing the sale. |
|         |                      |                | Learning experiences for the HSC must address:  
Possible extras and add-ons including:  
- travel insurance products  
- additional transfers  
- meet-and-greet services  
- add-on side trips  
- optional sightseeing  
- additional meals. |
| 2.4     | Make customers aware of possible ‘extras’ and ‘add-ons’. |                | Learning experiences for the HSC must address:  
Awareness of enterprise goals and promotional focus and how this information can be displayed including:  
- product brochures and fliers  
- service timetables or schedules  
- trade and consumer advertising  
- special promotions  
- joint promotional activities with operators  
- consumer word-of-mouth recommendations  
- repeat business opportunities  
- tourism industry incentives. |
| 2.5     | Pro-actively promote products and services at appropriate opportunities in accordance with current enterprise goals and promotional focus. | Promoting products and services may include:  
- displays  
- promotions  
- special offers and deals  
- menus and ‘specials’  
- word of mouth  
- up-selling. |                |
### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing</td>
<td>1</td>
<td>Researching information and feedback about customer needs and preferences</td>
</tr>
<tr>
<td>Information</td>
<td></td>
<td>Compiling information about the products and services of a particular enterprise</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>2</td>
<td>Advising customer of products and services</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Relating information about customer feedback to colleagues and other relevant persons</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Promoting products and services to customers in an manner suitable to customer and situation</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Planning to promote a particular product or service on a particular occasion</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Working with other members of the service team</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Relaying information about products to other members to enhance performance of the team</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>2</td>
<td>Trying to satisfy difficult customers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Contributing to ideas to improve products and services</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using the Internet to research product information</td>
</tr>
<tr>
<td></td>
<td></td>
<td>May use email or the phone to promote products or services</td>
</tr>
<tr>
<td>Training Package</td>
<td>Hospitality (THH02)</td>
<td>HSC Requirements and Advice</td>
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<tr>
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</tr>
<tr>
<td>Title:</td>
<td>Deal with conflict situations</td>
<td></td>
</tr>
<tr>
<td>Unit Code</td>
<td>THHGCS03B</td>
<td></td>
</tr>
<tr>
<td>Unit Descriptor:</td>
<td>This unit deals with the skills and knowledge required to handle difficult interpersonal situations – both with customers and colleagues. The unit covers the conflict resolution skills required by all people working in the tourism and hospitality industry to address the conflicts which may arise in day-to-day work activities. It does not include formal negotiation, counselling or conducting mediation.</td>
<td></td>
</tr>
</tbody>
</table>

## Essential Knowledge and Skills to be Assessed

The following skills and knowledge must be assessed as part of this unit:
- types of conflict in the workplace and typical causes
- conflict theory including signs, stages, levels, factors involved, results
- group processes and roles people play
- organisational structures, workplace culture and policies
- conflict resolution skills and strategies incorporating communication skills of:
  - assertiveness
  - listening
  - non-verbal communication
  - language style
  - problem solving
  - negotiation
  - procedures for customer complaints.

## Critical Aspects of Assessment

Evidence of the following is critical:
- knowledge of conflict resolution techniques
- ability to apply conflict resolution techniques to resolve a range of different conflict situations in contexts appropriate to the sector and workplace.

## Context of Assessment and Resource Implications

Assessment must ensure:
- activities that allow the candidate to address a range of commonly-occurring conflict situations that may be found in the workplace. These should be related to the usual work roles of the candidate, such as handling customer complaints in a restaurant, resolving disputes with colleagues over work aspects, dealing with contractors or suppliers who fail to meet obligations
- interaction with others to demonstrate appropriate interpersonal skills for resolving conflicts.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

## Assessment Methods

Assessment methods must be chosen to ensure that dealing with conflict can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:
- direct observation of the candidate demonstrating complaint handling or negotiation skills, either in the workplace or through role plays
- case studies to analyse and resolve conflict situations arising in various work contexts
- written or oral questions to assess underpinning theories related to conflict resolution
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

## Linkages with Other Units

This unit must be assessed with or after the following unit. This unit describes the skills and knowledge essential to the achievement of competence.

## Key Terms and Concepts

- active listening
- barriers to communication
- collaborative decision-making
- conflict
- conflict resolution
- cultural sensitivity
- discretion
- effective communication
- empathy
- ethnocentrism
- follow-up
- goodwill
- level of authority
- negotiation
- problem-solving
- public relations
- questioning techniques
- remedies
- stereotyping
- subtext
- tolerance
- win-win.
### Linkages with Other Units

- THHCOR01B Work with colleagues and customers

This unit has linkages to the following units and combined training and assessment may be appropriate:
- THHGCS08B Establish and conduct business relationships
- THHGLE01B Monitor work operations
- THHGLE08B Lead and manage people
- THHGLE09B Manage workplace diversity.

Note that problem solving is included in both this unit and unit THHGLE01B Monitor work operations. Care should be taken to avoid duplication in training and assessment.
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Identify conflict situations</td>
<td>Identify potential for conflict quickly and take swift and tactful action to prevent escalation.</td>
<td>This unit applies to tourism and hospitality and catering operations where food is prepared and served. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. Conflict situations may relate to: - customer complaints - conflicts among work colleagues - refused entry - drug or alcohol affected persons - ejection from premises - delayed customers.</td>
</tr>
<tr>
<td>1.1</td>
<td>Identify conflict situations</td>
<td>Identify situations where personal safety of customers or colleagues may be threatened and organise appropriate assistance.</td>
<td>Situations where personal safety of customers or colleagues may be threatened and assistance is required may include those where there are: - drug or alcohol affected persons who cannot be reasoned with - people with guns or arms - situations where someone has been or may be hurt - people who appear to be violent or are threatening - situations where customers refuse to leave or be pacified.</td>
</tr>
<tr>
<td>1.2</td>
<td>Identify conflict situations</td>
<td></td>
<td>Learning experiences for the HSC must address: Identify specific situations that compromise the health and safety of colleagues and customers including: - breaches of security - unsafe work practices - uncontrolled/aggressive visitors or staff - potential hazards. Potential hazards identified as: - chemical - physical - biological - psychological - ergonomic - radiation. Identify appropriate personnel and emergency service/s to be contacted in the event of: - accidents or illness - threats or acts of terrorism - threats or acts of violence</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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</tbody>
</table>
| 2 Resolve conflict situations | 2.1 Take responsibility for finding a solution to the conflict within the scope of individual responsibility. | Conflict situations may relate to:  
- customer complaints  
- conflicts among work colleagues  
- refused entry  
- drug or alcohol affected persons  
- ejection from premises  
- delayed customers. | Learning experiences for the HSC must address:  
The importance of acting within one’s level of authority in terms of:  
- taking initiative  
- problem-solving  
- decision-making.  
An understanding of workable solutions to conflict resolution within the following contexts:  
- poor customer service  
- variations in colleagues’ work practices/methods  
- cultural misunderstanding  
- barriers to communication  
- aggressive behaviour.  
Understanding lines of reporting and communication with supervisors and peers within the workplace.  
How and when to seek assistance. |
| | 2.2 Encourage all points of view and accept them and treat them with respect. | | Learning experiences for the HSC must address:  
The importance of:  
- tolerating and respecting difference  
- adopting a sensitive approach when dealing with other points of view  
- constructively raising and discussing issues. |
| | 2.3 Use effective communication skills to assist in the management of the conflict. | | Learning experiences for the HSC must address:  
Using communication techniques that are:  
- clear  
- concise  
- tactful  
- courteous  
- culturally sensitive  
Questioning techniques:  
- open questions  
- closed questions  
- reflective questions.  
The technique of active listening. |
<table>
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<tr>
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<th>Performance Criteria</th>
<th>Range Statement</th>
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</tr>
</thead>
<tbody>
<tr>
<td>2.4</td>
<td>Use accepted conflict resolution techniques to manage the conflict situation and develop solutions.</td>
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</tr>
</tbody>
</table>

**Learning experiences for the HSC must address:**

- Strategies for working collaboratively to find win-win solutions to specific problems.
- Conflict resolution techniques, specifically those that:
  - eliminate adversarial contests
  - promote the concept of ‘win-win’
  - allow for solutions that meet all parties’ needs.
- Collaborative decision-making processes:
  - consultation
  - conciliation
  - negotiation
  - principles of equity and fairness.
- Conflict resolution as a means to:
  - improving business relationships
  - eliminating entrenched practices
  - future development of the enterprise.

<table>
<thead>
<tr>
<th>3</th>
<th>Respond to customer complaints</th>
<th>3.1 Handle complaints sensitively, courteously and discreetly.</th>
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<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Learning experiences for the HSC must address:</strong></td>
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<tr>
<td></td>
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<td></td>
<td>Handling complaints diplomatically, so that all parties recognise that:</td>
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<td></td>
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<td>- the issue has been raised with the relevant authority</td>
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<td></td>
<td></td>
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<td>- all points of view have been aired</td>
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<td></td>
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<td>- discretion will be applied in resolving the matter</td>
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<td>- due process will be followed</td>
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<td></td>
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<td>- action will be taken to address and remedy the matter</td>
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</tbody>
</table>

- Confidentiality and conflict resolution.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>3.2 Take responsibility for resolving the complaint.</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>Learning experiences for the HSC must address:</strong></td>
<td>The importance of acting within level of authority in terms of:</td>
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<td></td>
<td></td>
<td></td>
<td>- taking initiative</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- problem-solving</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- decision-making.</td>
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</tbody>
</table>

- Understanding lines of reporting and communication with supervisors and peers within the workplace.
- How and when to seek assistance.
<table>
<thead>
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<th>Range Statement</th>
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</tr>
</thead>
<tbody>
<tr>
<td>3.3</td>
<td>Establish and agree on the nature and details of the complaint with the customer.</td>
<td></td>
<td>Learning experiences for the HSC must address: Establishing the details of the customer complaint through: • questioning and active listening techniques • summarising and clarifying the issue • recording details of complaint • discussing with customer the process of resolution.</td>
</tr>
<tr>
<td>3.4</td>
<td>Take appropriate action to resolve the complaint to the customer's satisfaction wherever possible.</td>
<td></td>
<td>Learning experiences for the HSC must address: Servicing a customer’s complaint where the means to resolution is not immediately available. Reasons of referring customer complaints to the following personnel: • immediate supervisors • department managers. Benefits of following up with customers post-resolution.</td>
</tr>
<tr>
<td>3.5</td>
<td>Where appropriate, use techniques to turn complaints into opportunities to demonstrate high quality customer service.</td>
<td></td>
<td>Learning experiences for the HSC must address: Establishing good customer service practices including: • knowledge of enterprise products/services and policies • prompt response to resolve complaints • language that is targeted to the specific customer • friendly and courteous manner • positive gestures and body language • solutions-oriented approach. The value of amicably resolving customer complaints in terms of: • promoting goodwill • customer relations • publicity • promoting enterprise service ethic.</td>
</tr>
<tr>
<td>3.6</td>
<td>Complete any necessary documentation accurately and legibly within time constraints.</td>
<td></td>
<td>Learning experiences for the HSC must address: Different means of documenting issues and complaints, including customer service log, complaints register, incident reports and memoranda.</td>
</tr>
</tbody>
</table>
Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

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<tr>
<th>Key Competencies</th>
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<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>2</td>
<td>Obtaining the relevant facts and opinions about a particular complaint or conflict situation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Taking into account cultural differences in dealing with complaints or disputes</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>2</td>
<td>Completing records or reports on complaints or incidents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Providing advice or options to customers in resolving complaints</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>2</td>
<td>Working out the most appropriate way to deal with a dispute or complaint</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Planning the steps to deal with a particular conflict</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>2</td>
<td>Negotiating to solve differences with colleagues</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Resolving disputes about services or goods</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Turning complaints into positive customer service situations</td>
</tr>
<tr>
<td>Using Technology</td>
<td>-</td>
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</tr>
<tr>
<td>Training Package</td>
<td>Business Services (BSB01)</td>
<td>HSC Requirements and Advice</td>
</tr>
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</tr>
<tr>
<td><strong>Title:</strong></td>
<td>Use business technology</td>
<td></td>
</tr>
<tr>
<td><strong>Unit Code</strong></td>
<td><strong>Unit Descriptor:</strong></td>
<td></td>
</tr>
<tr>
<td>BSCCMN205A</td>
<td>This unit covers the skills and knowledge required to select, use and maintain business technology. This technology includes the effective use of computer software to organise information and data. This unit is related to BSCCMN307A Maintain business resources.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Context/s of Assessment</th>
<th>Critical aspects of Evidence</th>
<th>Consistency of Performance</th>
<th>Resource Implications</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| • Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement | • Selection and application of functional software applications to produce workplace documents  
• Application of Occupational Health and Safety procedures for set up of workstation, operation of computer, changing toner cartridges and other work with plant and substances  
• Access, retrieval and storage of required data | In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations | The learner and trainer should have access to appropriate documentation and resources normally used in the workplace |                             |

<table>
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</table>
| • Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package  
• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment  
• Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit | | | | |

<table>
<thead>
<tr>
<th>Key Terms and Concepts:</th>
</tr>
</thead>
</table>
| • ergonomics  
• file generation  
• amendment  
• technology consumables  
• routine maintenance  
• digital camera  
• Zip drive  
• modem  
• scanner  
• spreadsheet  
• data base  
• log-on  
• data storage  
• manufacturer’s guidelines  
• keyboard  
• numerical key pad  
• directories  
• sub-directories  
• CD-ROM  
• hard drive  
• floppy-disk drive  
• back-up system |
<table>
<thead>
<tr>
<th>Element of Competency</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>Evidence Guide</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Select and use technology and software applications are selected to achieve the requirements of the task</td>
<td>1.1 Appropriate technology and software applications are selected to achieve the requirements of the task</td>
<td>Legislation, codes and national standards relevant to the workplace which may include: - award and enterprise agreements and relevant industrial instruments - relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination - relevant industry codes of practice Technology may include: - computer technology, such as laptops and PCs - digital cameras - zip drives - modems - scanners - printers Software applications may include: - email, internet - word processing, spreadsheet, database, accounting, or presentation packages</td>
<td>• Knowledge* * At this level the learner must demonstrate basic operational knowledge in a moderate range of areas. - The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination - The organisation’s policies, plans and procedures, especially in regard to file-naming and storage conventions - The correct log-on and shut-down procedures for computer equipment - Organisational IT procedures including back-up and virus protection procedures</td>
<td>Learning experiences for the HSC must address: Operation of computer equipment in accordance with manufacturers’ instructions involving: - boot up - log on - log off - opening files - modifying files - saving files - printing files</td>
</tr>
<tr>
<td>1.2 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user</td>
<td>1.2 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user</td>
<td>Learning experiences for the HSC must address: The Occupational Health and Safety requirements of computer equipment, workstation and operator. Ergonomic concerns eg posture, lighting, height of chair and table.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.3 Technology is used according to organisational requirements and in a way which promotes a safe work environment</td>
<td>1.3 Technology is used according to organisational requirements and in a way which promotes a safe work environment</td>
<td>Organisational requirements may relate to procedures including: - log-on procedures - correctly identifying and opening files - locating data - saving and closing files - Occupational Health and Safety policies, procedures and programs - storing data - manufacturer’s guidelines - legal and organisation policy/guidelines and requirements</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Learning experiences for the HSC must address:

- Operation of computer equipment in accordance with manufacturers’ instructions involving:
  - boot up
  - log on
  - log off
  - opening files
  - modifying files
  - saving files
  - printing files

The Occupational Health and Safety requirements of computer equipment, workstation and operator.

Ergonomic concerns eg posture, lighting, height of chair and table.
<table>
<thead>
<tr>
<th>Element of Competency</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>Evidence Guide</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 2. Process and organise data | 2.1 Files and records are identified, opened, generated or amended according to task and organisational requirements | **Input devices may include:** - keyboard - numerical key pad - mouse - scanner | • **Knowledge**<sup>*</sup>  
* At this level the learner must demonstrate basic operational knowledge in a moderate range of areas.  
- The correct log-on and shut-down procedures for computer equipment  
- Organisational IT procedures including back-up and virus protection procedures  
- Basic technical terminology in relation to reading help-files and manuals  
• **Skills**  
- Literacy skills to identify work requirements and understand and process basic, relevant workplace information, follow written instructions  
- Communication skills to request advice, receive feedback and work with a team  
- Problem solving skills to solve routine problems  
- Keyboarding skills to produce basic workplace documents  
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities | Learning experiences for the HSC must address:  
Storing and retrieving documents.  
Saving and printing documents. |
|  | 2.2 Input devices are operated according to organisational requirements | **Input devices may include:** - keyboard - numerical key pad - mouse - scanner |  |  |
|  | 2.3 Data is stored appropriately and applications are exited without damage to or loss of data | **Storage of data may include:**  
- storage in directories and sub-directories  
- storage on CD-ROMs, hard and floppy disk-drives or back-up systems  
- appropriate storage/filing of hard copies of computer generated documents |  | Learning experiences for the HSC must address:  
Filing procedures according to industry or enterprise policy including:  
- security/confidentiality  
- updating  
- retrieval and movement of files  
- inactive files storage, removal and destruction. |
|  | 2.4 Manuals, training booklets and/or on-line help or help-desks are used to overcome basic difficulties with applications |  |  | Learning experiences for the HSC must address:  
Solutions to basic difficulties found in:  
- manuals  
- training booklets  
- online help  
- the help function within applications  
- help-desk. |
<table>
<thead>
<tr>
<th>Element of Competency</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>Evidence Guide</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 3. Maintain technology | 3.1 Used *technology consumables* are identified and replaced in accordance with manufacturer’s instructions and organisational requirements | Technology consumables may include: - printer ribbons and cartridges - CD-ROM - zip disks - print heads - floppy disks - toner cartridges - backup tapes | - **Knowledge**
  
  *At this level the learner must demonstrate basic operational knowledge in a moderate range of areas.*
  
  - Methods of detecting faults in and solving problems with business technology | Learning experiences for the HSC must address:
  
  Identification and replacement of consumables including:
  
  - printer ribbons and cartridges
  
  - CD-ROMS
  
  - floppy disks
  
  - toner cartridges
  
  - back-up tapes
  
  - Zip disks.
  
  Procedures for ordering new stock:
  
  - requisitions
  
  - order forms
  
  - tender/contract |
|                       | 3.2 *Routine maintenance* is carried out and/or arranged in order to ensure that equipment is maintained in accordance with manufacturer’s instructions and organisational requirements | Routine maintenance may include:
  
  - regular checking of equipment
  
  - replacing consumables
  
  - “in-house” cleaning and servicing of equipment according to manufacturer’s guidelines
  
  - periodic servicing by qualified or manufacturer approved technician | **Skills**
  
  - Literacy skills to identify work requirements and understand and process basic, relevant workplace information; follow written instructions;
  
  - Communication skills to request advice, receive feedback and work with a team
  
  - Problem solving skills to solve routine problems
  
  - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities | Learning experiences for the HSC must address:
  
  Manufacturers’ manuals are accessed to carry out routine maintenance. |
|                       | 3.3 Equipment faults are accurately identified and action taken in accordance with manufacturer’s instructions or by reporting fault to designated person | Equipment faults or problems may be identified or anticipated by:
  
  - routine checking of equipment
  
  - preparation of a maintenance program
  
  - encouraging feedback from work colleagues
  
  - regular back-ups of data
  
  - keeping a log book of detected faults
  
  - regular Occupational Health and Safety inspections
  
  - checking that repairs have been carried out | Learning experiences for the HSC must address:
  
  Common faults and solutions including:
  
  - paper jams
  
  - system failures
  
  - low toner/ink cartridge. |
### Key Competency Levels

**NB:** These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

<table>
<thead>
<tr>
<th>Collect, analyse and organise information</th>
<th>Communicate ideas and information</th>
<th>Plan and organise activities</th>
<th>Work with others and in teams</th>
<th>Use mathematical ideas and techniques</th>
<th>Solve problems</th>
<th>Use technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td>Level 1</td>
<td>Level 1</td>
<td>Level 1</td>
<td>Level 1</td>
<td>Level 1</td>
<td>Level 2</td>
</tr>
</tbody>
</table>

Three levels of performance denote level of competency required to perform task.

1. **Perform**
2. **Administer**
3. **Design**

- **Collecting, analysing and organising information** – to identify application needs
- **Communicating ideas and information** – with members of the work team
- **Planning and organising activities** – for self
- **Working with teams and others** – in communicating equipment faults
- **Using mathematical ideas and techniques** – when preparing routine maintenance
- **Solving problems** – to identify application problems
- **Using technology** – to complete allocated tasks

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.
<table>
<thead>
<tr>
<th>Training Package</th>
<th>Business Services (BSB01)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong></td>
<td><strong>Produce simple word-processed documents</strong></td>
</tr>
<tr>
<td><strong>Unit Code</strong></td>
<td><strong>BSBCMN213A</strong></td>
</tr>
<tr>
<td><strong>Unit Descriptor:</strong></td>
<td>This unit covers preparation and production of short routine letters, notes, memos and records using word-processing software. This unit is related to BSBCMN107A Operate a personal computer, BSBCMN108A Develop keyboard skills and BSBCMN306A Produce business documents.</td>
</tr>
</tbody>
</table>

| HSC Indicative Hours: | 25 |

<table>
<thead>
<tr>
<th><strong>Context/s of Assessment</strong></th>
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<th><strong>Consistency of Performance</strong></th>
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<th><strong>HSC Requirements and Advice</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement</td>
<td>• Integrated demonstration of all elements of competency and their performance criteria</td>
<td>In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations</td>
<td>The learner and trainer should have access to appropriate documentation and resources normally used in the workplace. These may include:</td>
<td><strong>Key Terms and Concepts:</strong></td>
</tr>
<tr>
<td>• Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package</td>
<td>• Knowledge of simple word processing functions</td>
<td>• Workplace reference materials such as style guides</td>
<td>• ergonomic requirements</td>
<td></td>
</tr>
<tr>
<td>• Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment</td>
<td>• Knowledge of standard document layout</td>
<td>• Computer equipment with word processing software</td>
<td>• energy and resource conservation techniques</td>
<td></td>
</tr>
<tr>
<td>• Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit</td>
<td>• Knowledge of simple document design principles</td>
<td>• English dictionary</td>
<td>• minimise wastage</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Knowledge of organisational requirements for simple word processed documents</td>
<td></td>
<td>• document style</td>
<td></td>
</tr>
</tbody>
</table>

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace. These may include:

- Workplace reference materials such as style guides
- Computer equipment with word processing software
- English dictionary

**Key Terms and Concepts:**
- ergonomic requirements
- energy and resource conservation techniques
- minimise wastage
- document style
- templates
- workstation
- posture
- noise minimisation
- repetition
- power-save options
- agenda
- flyer
- default settings
- formatting
- page orientation
- logo
- enhancement
- alignment
- file/directory
- proofreading
- consistency
<table>
<thead>
<tr>
<th>Element of Competency</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>Evidence Guide</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 1. Use safe work practices | 1.1 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user | Legislation, codes and national standards relevant to the workplace may include:  
- award and enterprise agreements and relevant industrial instruments  
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination  
- relevant industry codes of practice  
Organisational policy and procedures may include:  
- log-on procedures  
- password protection  
- storage / location of data  
- standard formats  
- author’s instructions  
- use of templates  
Ergonomic requirements may include:  
- workstation height and layout  
- chair height, seat and back-adjustment  
- footrest  
- screen position  
- keyboard and mouse position  
- document holder  
- posture  
- avoiding radiation from computer screens  
- lighting  
- noise minimisation | • Knowledge  
*At this level the learner must demonstrate basic operational knowledge in a moderate range of areas.  
- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination  
- Organisational requirements for ergonomics, work periods and breaks, and conservation techniques.  
• Skills  
- Communication including questioning and clarifying  
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities | Learning experiences for the HSC must address:  
An understanding of OH&S guidelines relating to screen-based equipment and ergonomic work stations.  
Ergonomic requirements including:  
- workstation height and layout  
- chair height, seat and back-adjustment  
- footrest  
- screen position  
- keyboard and mouse position  
- document holder  
- posture  
- avoiding radiation from computer screens  
- lighting  
- noise minimisation. |
| 1.2 Work organisation meets organisational and Occupational Health and Safety requirements for computer operation | Work organisation may include:  
- mix of repetitive and other activities  
- rest periods  
- exercise breaks | |
| | | |

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<table>
<thead>
<tr>
<th>Element of Competency</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>Evidence Guide</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 1.3 Energy and resource conservation techniques are used to minimise wastage in accordance with organisational and statutory requirements | Conservation techniques may include:  
- double-sided paper use  
- re-used paper for rough drafts (observing confidentiality requirements)  
- disposing of non-confidential waste paper in recycling bins  
- utilising power-save options for equipment | Learning experiences for the HSC must address:  
An understanding of energy and resource conservation techniques include:  
- re-use  
- recycle  
- power-save options. |
| 2. Confirm document requirements | Documents may include:  
- memos  
- faxes  
- letters  
- standard form letters  
- labels  
- envelopes  
- agendas  
- minutes  
- briefing papers  
- short reports  
- simple one-page flyers | Learning experiences for the HSC must address:  
Business documents in a variety of formats including:  
- memos  
- tables  
- faxes  
- letters  
- invoices  
- envelopes  
- flyers.  
Storage and security requirements including:  
- saving work regularly  
- updating files  
- creation of back-up files  
- off-site storage of files  
- password, log on, log off procedures. |
<table>
<thead>
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<th>Evidence Guide</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 3. Produce documents  | 3.1 Text is entered, checked and amended in accordance with organisational and task requirements | Checking may include:  
- proofreading  
- accuracy of information  
- spelling, electronically and manually  
- grammar  
- consistency of layout  
- ensuring instructions with regard to content and format have been followed | • Knowledge  
*At this level the learner must demonstrate basic operational knowledge in a moderate range of areas.*  
- Knowledge of the purposes of and the uses and function of word processing software  
- Formatting styles and rules of the organisation’s style guide  
- Effect of formatting on readability and appearance of documents  
**Skills**  
- Keyboarding and technology skills  
- Literacy skills for reading and understanding the organisation’s procedures; using basic models to produce a range of correspondence; using page layout to support text structure  
- Proofreading and editing skills for checking own work and re-reading for accuracy against original  
- Communication including questioning and clarifying  
- Problem-solving skills to solve routine problems  
- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities | Learning experiences for the HSC must address:  
Proofreading skills (symbols as per *Australian Government Style Manual for Authors, Editors and Printers*).  
Using spelling and grammar tools. |
| 3.2 Software functions are utilised for consistency of design and layout and document is formatted in accordance with organisational style and presentation requirements | Software functions may include:  
- default settings  
- page setup  
- paragraph formatting  
- text formatting  
- tabs  
- line spacing  
- page numbers  
- headers/footers  
- spell check  
- grammar check  
- indent  
- document protection  
**Formatting may include:**  
- page orientation  
- margins  
- company logo / letterhead  
- columns  
- enhancements to text – colour, size, orientation  
- enhancements to format – borders, patterns and colours  
- alignment on page  
- headers/footers | | |

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<table>
<thead>
<tr>
<th>Element of Competency</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>Evidence Guide</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 3.3 Manuals, user documentation and online help are used to overcome problems with document presentation and production | Printing may include:  
- printer setup  
- whole document  
- specified pages  
- odd or even pages  
- multiple copies | | | |
| 3.4 Mailable document is previewed, adjusted and printed in accordance with organisational and task requirements | Designated timelines may include:  
- timeline agreed with supervisor/person requiring document/s  
- timeline agreed with internal/external client  
- organisation timeline eg deadline requirements | | | Learning experiences for the HSC must address:  
Speed and accuracy are to enterprise standards. |
| 3.5 Documents are prepared within designated timelines, organisational requirements and Australian standards for speed and accuracy | Naming and storage of documents may include:  
- file names which are easily identifiable in relation to the content  
- file/directory names which identify the operator, author, section, date etc  
- file names according to organisational procedure eg numbers rather than names  
- storage in folders / sub-folders  
- storage on hard/floppy disk drives, CD-ROM, tape backup  
- organisation policy for backing up files  
- organisation policy for filing hard copies of documents  
- filing locations  
- security  
- authorised access | | | Learning experiences for the HSC must address:  
Storing documents in different forms including:  
- hard copy  
- electronic  
- filing locations  
- security  
- authorised access. |
### Key Competency Levels

*NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.*

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<tr>
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<th>Communicate ideas and information</th>
<th>Plan and organise activities</th>
<th>Work with others and in teams</th>
<th>Use mathematical ideas and techniques</th>
<th>Solve problems</th>
<th>Use technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 2</td>
<td>Level 2</td>
<td>Level 2</td>
<td>Level 2</td>
<td>Level 2</td>
<td>Level 2</td>
<td>Level 2</td>
</tr>
</tbody>
</table>

Three levels of performance denote level of competency required to perform task.

1. Perform
2. Administer
3. Design

- **Collecting, analysing and organising information** – to meet organisational requirements
- **Communicating ideas and information** – through well-designed business documents
- **Planning and organising activities** – to meet designated timelines
- **Working with teams and others** – to determine document purpose and audience
- **Using mathematical ideas and techniques** – to determine spatial design requirements
- **Solving problems** – using manuals and online help
- **Using technology** – to produce word-processing documents

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies.
Title: Process and monitor event registrations

Unit Code: THTSOP15B

Unit Descriptor: This unit deals with the skills and knowledge required to process, monitor and finalise registrations for meetings or events. These skills are usually required by office-based staff involved in the event organisation process.

Essential Knowledge and Skills to be Assessed

The following knowledge and skills must be assessed as part of this unit:
- general knowledge of the meetings sector of the tourism industry
- meeting/event registration procedures and systems, including current technological developments
- issues that arise in the administration of meeting/event registrations.
- operation of data base to control registrations
- use of various reports
- general knowledge of customers for different types of meetings/events.

Critical Aspects of Assessment

Evidence of the following is critical:
- ability to accurately process registrations and produce accurate registration materials within enterprise acceptable timeframes
- knowledge of meeting and event registration systems and procedures.

Context of Assessment and Resource Implications

Assessment must ensure:
- project or work activities conducted over a period of time to allow the candidate to demonstrate registration processing and monitoring for an event
- demonstration of skills on more than one occasion to ensure that skills in dealing with a range of circumstances is demonstrated and that registration performance is consistent
- demonstration of skills within an operational office environment which provides access to industry-current computers, printers and database programs
- use of a full range of meetings or events registration documentation
- realistic ratios of registration requests to staff during actual or simulated activities
- presence of typical workplace time constraints for the completion of tasks.

Assessment Methods

Methods must be chosen to ensure that the skills required to process, monitor and finalise registrations for a meeting or event can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:
- review of registration documentation and reports prepared by the candidate in preparation for an event
- evaluation of reports prepared by the candidate on the registration process for an event, including challenges and responses
- written and oral questioning or interview to test knowledge of registration procedures and material formats
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

Key Terms and Concepts

- database
- delegate
- enterprise procedures
- event registration
- finalise registrations
- guest/delegate documentation
- guest/delegate report
- monitor registrations
- payment status
- process registrations.
<table>
<thead>
<tr>
<th>Essential Knowledge and Skills to be Assessed</th>
<th>Critical Aspects of Assessment</th>
<th>Context of Assessment and Resource Implications</th>
<th>Assessment Methods</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linkages with Other Units</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>This unit must be assessed with or after the following units. These units describes skills and knowledge that are essential to this unit of competence:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• THHGGA02B Perform office procedures</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>There is also a very strong link between this unit and the following units and combined training and assessment may be appropriate:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• BSBCM205A Use business technology</td>
<td></td>
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</tr>
<tr>
<td>• THTSOP07B Book and co-ordinate supplier services</td>
<td></td>
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<tr>
<td>• THTFME01B Co-ordinate guest/delegate registrations at venue</td>
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<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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</tr>
<tr>
<td>1</td>
<td>Process registrations</td>
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<tr>
<td></td>
<td>1.1 Set up a database according to the requirements for a specific meeting/event.</td>
<td>This unit applies to all tourism industry sectors and enterprises where registrations for meetings and events are co-ordinated. It has particular application to professional conference organisers, meetings and events management organisations. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances. Registration systems may be:  - computerised  - manual.</td>
<td>Learning experiences for the HSC must address: Information to be included in an event registration database including:  - delegate name  - delegate contact details  - accommodation requirements  - additional meal requirements  - pre-booked session requirements  - additional pre-event and/or post-event accommodation or sightseeing requirements  - pre- and post-transfer requirements  - arrival and departure transport arrangements or requirements  - special accommodation or venue requests  - booking conditions  - cancellation and amendment fees  - deposit and final payment status. Event registration database may be:  - computerised  - manual.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.2 Receive and process registrations in accordance with agreed procedures and timelines.</td>
<td>Guest/delegate reports and/or lists may include the following information:  - payment status  - details of pre-booked sessions  - travel and touring arrangements  - accommodation details  - special requests  - further action required at venue.</td>
<td>Learning experiences for the HSC must address: Requirements to receive and process meetings and event registration within time frames including:  - payment status  - details of pre-booked sessions  - travel and touring arrangements  - accommodation details  - special requests  - further action required at venue.</td>
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<tr>
<td></td>
<td>1.3 Provide correct answers to guest/delegate questions relating to the meeting/event.</td>
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<tr>
<td></td>
<td>1.4 Action any accommodation, travel and touring requirements in accordance with agreed procedures.</td>
<td></td>
<td>Learning experiences for the HSC must address: Requirements include:  - travel and touring arrangements  - accommodation details  - special requests.</td>
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<tr>
<td>Element</td>
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<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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</tr>
</tbody>
</table>
| 1.5     | Report special delegate requirements to suppliers. | Documents issued to delegates and guests may include:  
- invoices  
- credit notes  
- receipts  
- service vouchers  
- confirmation letters  
- information packs  
- sponsor advertisements. | Learning experiences for the HSC must address:  
Documents issued to guests/delegates including:  
- invoices  
- credit notes  
- receipts  
- service vouchers  
- confirmation letters  
- information packs  
- sponsor advertisements. |
| 1.6     | Issue confirmations in accordance with agreed procedures and within designated timelines. |  |  |
| 1.7     | Prepare and issue documents and other materials to registered delegates/guests in accordance with requirements of the specific meeting/event. | Updating the financial status of the customer’s records may include:  
- receiving, processing and recording payments  
- generating and issuing invoices and credit notes for changed arrangements  
- checking that the customer has fully paid. | Learning experiences for the HSC must address:  
Updating the financial status of the customer’s records including:  
- receiving, processing and recording payments  
- generating and issuing invoices and credit notes for changed arrangements  
- processes for checking that the customer has fully paid. |
| 1.8     | Update the financial status of the customer’s records accurately and in accordance with enterprise procedures. |  |  |
| 2       | Monitor registrations | 2.1 Monitor registration numbers with complete accuracy and provide reports on a regular basis to appropriate colleagues/customers/suppliers. |  |
|         |                      | 2.2 Take any required action to boost numbers in accordance with instructions. |  |
| 3       | Finalise registrations and produce materials | 3.1 Finalise registration details within designated timelines. |  |
|         |                      | 3.2 Produce and check name tags and other individual delegate documentation in accordance with agreed style for a specific meeting/event. |  |
Element: 3.3  
Performance Criteria: Produce and check for accuracy guest/delegate reports and/or lists to include all required information.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>2</td>
<td>Checking registration requests and processing registrations in line with the guest or delegate’s request</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>2</td>
<td>Providing information on the venue facilities and meeting or event activities to the guests and delegates</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>2</td>
<td>Determining the number of registrations to be processed and prioritising the order of confirmations to be provided to various customers</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>2</td>
<td>Providing relevant reports to other personnel and suppliers to ensure the required information is available to them</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>2</td>
<td>Checking and recording numbers of registrations for particular meeting or event sessions Calculating appropriate costs and issuing invoices</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>2</td>
<td>Identifying and actioning any discrepancies with registrations</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using a calculator to calculate numbers of registrations and payment details Using a computer data base to control the registrations</td>
</tr>
</tbody>
</table>
### Training Package
Tourism (THT02)

### Title:
Co-ordinate guest and delegate registrations at venue

### Unit Code
THTFME01B

### Unit Descriptor:
This unit deals with the skills and knowledge required to prepare for and undertake the on-site registration of guests and delegates at a meeting or event. On-site registration may be performed by venue staff or external staff. This role would normally be undertaken by a person acting under supervision.

### HSC Indicative Hours:
15

### Essential Knowledge and Skills to be Assessed
The following knowledge and skills must be assessed as part of this unit:
- use and characteristics of materials and equipment used for meeting or event registration
- interpretation of meeting or event order documentation and pre-registration documentation
- typical registration procedures for a range of meetings and events
- safe work practices particularly in relation to bending, lifting and carrying items used at registration desks
- safety/risk issues associated with the movement of numbers of people at meeting and event venues.

### Critical Aspects of Assessment
Evidence of the following is critical:
- knowledge of registration procedures as they apply to a range of meeting and event styles
- ability to prepare registration materials, set up a registration area and efficiently process registrations within workplace acceptable timeframes.

### Context of Assessment and Resource Implications
Assessment must ensure:
- demonstration of skills for an actual meeting or event at a venue which includes a fully-equipped and operational events registration desk
- commercially-realistic ratios of registration staff to customers
- provision of registration services to customers within typical workplace time constraints
- use of industry-current types of registration materials and equipment.

### Assessment Methods
Methods must be chosen to ensure that the skills required to prepare for and to action registrations at a venue can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:
- direct observation of the candidate processing registrations at a meeting or event
- review of registration documentation prepared by the candidate
- written and oral questioning or interview to test knowledge of registration procedures and materials
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Linkages with Other Units
This unit has strong linkages to the following unit and combined training and assessment may be appropriate:
- THTSOP15B Process and monitor meeting or event registrations

### Key Terms and Concepts
- audio-visual equipment
- cash float
- delegate
- enterprise procedures
- no-shows
- on-site registration
- pre-event and post-event signage
- site inspection
- venue orientation kits
- venue provider
- work overflow.
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Prepare for registration</td>
<td>1.1 Check and prepare all materials and equipment required for registration prior to the meeting or event.</td>
<td>This unit applies to all tourism and hospitality industry sectors and enterprises where on-site registration for meetings and events is required. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances. Registration and information materials and equipment may include: • computer • guest/delegate lists • delegate kits • delegate reports • promotional display materials • display stands • name tags • stationery • signage • spare supplies • cash float.</td>
<td>Learning experiences for the HSC must address: On-site procedures to set up equipment and guest/delegate information including: • audiovisual equipment • computers • guest/delegate lists • delegate kits • delegate reports • promotional display materials • display stands • name tags • stationery • signage • spare supplies • cash float.</td>
</tr>
<tr>
<td></td>
<td>1.2 Check and reconfirm the arrangements for set up of the registration area with the venue in accordance with enterprise procedures.</td>
<td></td>
<td>Learning experiences for the HSC must address: An understanding of promotional and guest/delegate venue preparation and equipment required including: • computers • furniture • promotional display materials • display stands • venue stationery • signage • audiovisual equipment.</td>
</tr>
<tr>
<td></td>
<td>1.3 Confirm access details with the venue to ensure that registration materials and equipment can be readily unloaded and reloaded at the venue.</td>
<td></td>
<td>Learning experiences for the HSC must address: An understanding of which venue personnel may assist and/or give advice including: • availability of on-site personnel and equipment to assist transfer, set up and collection of information and equipment at venue • relevant OHS issues • specific venue requirements.</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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</tr>
<tr>
<td>2</td>
<td>Set up registration area</td>
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<tr>
<td>2.1</td>
<td>Locate the registration area and check that the venue provider has completed the set up in accordance with pre-arranged requests.</td>
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<tr>
<td>2.2</td>
<td>Carry out a brief site inspection to become completely familiar with the venue and its facilities.</td>
<td></td>
<td>Learning experiences for the HSC must address: An understanding of a site inspection and why it is necessary to familiarise the coordinator with the venue facility and environment including: • restaurants and bars • leisure areas including swimming pools, saunas, gyms and sporting facilities • babysitting facilities • on-site shops • beauty parlour • meeting and conference rooms • front desk reception area • venue cashier and secure safe deposit facilities • location of delegate accommodation • local area destination information.</td>
</tr>
<tr>
<td>2.3</td>
<td>Erect all signage so that it is clearly visible and as per the agreed requirements.</td>
<td></td>
<td>Learning experiences for the HSC must address: Facilitation of signage including: • cooperation with venue personnel • correct application and positioning of any signage • consideration of OHS guidelines.</td>
</tr>
<tr>
<td>2.4</td>
<td>Install or arrange for the installation of equipment and conduct checks to ensure its working order prior to commencement of the meeting or event.</td>
<td></td>
<td>Learning experiences for the HSC must address: Installation or final check of equipment including: • audiovisual equipment • computers • lighting • signage • promotional displays.</td>
</tr>
<tr>
<td>2.5</td>
<td>Check that the registration area and any equipment has been set up to allow for easy access, especially for those with disabilities, and to avoid risk of injury to guests, delegates and colleagues.</td>
<td></td>
<td>Learning experiences for the HSC must address: Procedures to follow and appropriate personnel to contact to ensure venue facility is safe and appropriate to avoid injury to guests/legates including: • liaison with venue personnel to ascertain easy or more appropriate access and any venue specific OHS issues.</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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</tbody>
</table>
| 2.6     | Prepare and position all necessary registration and information materials within the registration areas to allow for efficient use by all personnel. | Registration and information materials and equipment may include:  
- computer  
- guest/delegate lists  
- delegate kits  
- delegate reports  
- promotional display materials  
- display stands  
- name tags  
- stationery  
- signage  
- spare supplies  
- cash float. | • requirements for guests/delegates with disabilities or special needs including:  
- mobility-impaired  
- sight-impaired  
- hearing-impaired.  

Learning experiences for the HSC must address:  
Venue set-up and preparation including:  
- entry and exit areas  
- registration point  
- pick-up point for information kits  
- collection area for any documentation  
- pre-event or post-event bookings or information  
- onward transfer arrangements  
- specific area or personnel assigned to assist with unregistered delegates or incorrect information  
- contact details of venue personnel who may assist with set-up or any special requests. |
| 3       | Process registrations |  
3.1     | Welcome guests and delegates in a courteous and friendly manner. |  
3.2     | Check and record all registration details in accordance with registration procedures. | Registration details may include:  
- payment status  
- details of pre booked sessions  
- touring arrangements  
- accommodation details.  

Learning experiences for the HSC must address:  
Understanding and interpreting guest/delegate documentation including:  
- conference agendas and timetables  
- guest/delegate lists  
- rooming lists  
- accommodation vouchers  
- meal vouchers  
- pre-event and post-event activities including sightseeing and accommodation lists  
- onward transfer arrangements.  

Procedures to follow and check when guests/delegates register including:  
- payment status  
- details of pre-booked sessions  
- accommodation details  
- pre-event or post-event additional sightseeing or accommodation  
- onward transport arrangements. |
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.3</td>
<td>Assist with work overflow of other registration personnel.</td>
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</tbody>
</table>
| 3.4     | Identify and action any discrepancies with minimum disruption to the guest or delegate. | Discrepancies may include:  
- unexpected on-site registrations  
- incorrect name details  
- incorrect payment details  
- incorrect pre bookings for particular sessions. | Learning experiences for the HSC must address:  
Procedures to follow when discrepancies occur including:  
- unexpected on-site registration process  
- amendment/update of incorrect guest/delegate details  
- recalculation and adjustment of incorrect payment details  
- adjustment of conference pre-bookings  
- additional requirements such as pre- or post-accommodation, sightseeing tours and transfers. |
| 3.5     | Keep an accurate record of no shows to allow for post event administration. | Record keeping may be:  
- computerised  
- manual. | Learning experiences for the HSC must address:  
Importance of accurate record-keeping to allow for post-event administration including provision of post-event information or applicable cancellation fees. |
| 3.6     | Provide correct and useful information and materials to the guests and delegates on features of the meeting or event and venue. | Registration and information materials and equipment may include:  
- computer  
- guest/delegate lists  
- delegate kits  
- delegate reports  
- promotional display materials  
- display stands  
- name tags  
- stationery  
- signage  
- spare supplies  
- cash float. | Learning experiences for the HSC must address:  
Guest/delegate information and material including:  
- guest/delegate lists  
- delegate kits  
- speakers’ papers or reports  
- name tags  
- stationery  
- conference agendas and timetables  
- accommodation vouchers  
- meal vouchers  
- pre-event and post-event activity sightseeing and accommodation options  
- venue orientation kits  
- destination area information. |
### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>2</td>
<td>Checking and preparing all registration records and organising correct amounts and type of information materials to be available for guests and delegates</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Providing information on the venue facilities and meeting or event activities to the guests and delegates</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>2</td>
<td>Checking and reconfirming the arrangements for the set up of the registration area</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Assisting with the registration work overflow of other registration personnel</td>
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<tr>
<td></td>
<td></td>
<td>Assisting stand holders when they take a break</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>1</td>
<td>Checking and recording numbers of registrations for particular meeting or event sessions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Processing cash and non-cash financial transactions for on site payments</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>2</td>
<td>Identifying and actioning any discrepancies with pre bookings</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using a calculator to calculate numbers of registrations and payment details</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Checking equipment to ensure it is operational</td>
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<tr>
<td>Training Package</td>
<td>Tourism (THT02)</td>
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<tr>
<td><strong>Title:</strong></td>
<td><strong>Develop and update event industry knowledge</strong></td>
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<tr>
<td><strong>Unit Code:</strong></td>
<td><strong>THTFME03A</strong></td>
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<tr>
<td><strong>Unit Descriptor:</strong></td>
<td>This unit describes the skills and knowledge required to develop and update general knowledge of the meetings and events industry including industry structure, legal issues and current technology. This knowledge underpins effective performance in all meeting and event organisation and management roles.</td>
<td></td>
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<table>
<thead>
<tr>
<th>Essential Knowledge and Skills to be Assessed</th>
<th>Critical Aspects of Assessment</th>
<th>Context of Assessment and Resource Implications</th>
<th>Assessment Methods</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following knowledge and skills must be assessed as part of this unit:</td>
<td><strong>Evidence of the following is critical:</strong></td>
<td><strong>Assessment must ensure:</strong></td>
<td><strong>Assessment methods must be chosen to ensure that the application of knowledge to event organisation activities can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.</strong></td>
<td><strong>Key Terms and Concepts</strong></td>
</tr>
<tr>
<td>- main types of events as listed in the Range Statement including the following for different event types:</td>
<td>- general knowledge of the events industry as listed under Essential Knowledge and Skills</td>
<td>- application of knowledge to specific event organisational contexts.</td>
<td><strong>The following examples are appropriate for this unit:</strong></td>
<td>• communication channels</td>
</tr>
<tr>
<td>- objectives/roles</td>
<td>- understanding of how industry knowledge can be applied to work activities to maximise effective performance</td>
<td></td>
<td>• current and emerging technology</td>
<td></td>
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<tr>
<td>- scope</td>
<td>- knowledge of ways to maintain currency of knowledge.</td>
<td></td>
<td>• events sector</td>
<td></td>
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<td>- nature of audience</td>
<td></td>
<td></td>
<td>• impact of events</td>
<td></td>
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<td>- key stakeholders</td>
<td></td>
<td></td>
<td>• key stakeholders</td>
<td></td>
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<tr>
<td>- key elements of staging an event</td>
<td></td>
<td></td>
<td>• legal and ethical issues</td>
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<tr>
<td>- structure and function of the events industry, including:</td>
<td></td>
<td></td>
<td>• legislation</td>
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<tr>
<td>- relationships between the events industry and other industries such as tourism, hospitality and entertainment</td>
<td></td>
<td></td>
<td>• Major Events Board</td>
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<tr>
<td>- businesses and organisations involved in the industry</td>
<td></td>
<td></td>
<td>• motivations for hosting events</td>
<td></td>
</tr>
<tr>
<td>- key motivations for hosting events</td>
<td></td>
<td></td>
<td>• motivations for spectator/audience participation</td>
<td></td>
</tr>
<tr>
<td>- the role and impact of events on local economies</td>
<td></td>
<td></td>
<td>• staging an event.</td>
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</tr>
<tr>
<td>- legal and ethical issues that impact on event management including overview of relevant legislation</td>
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<tr>
<td>- current and emerging technology for different aspects of the event management process.</td>
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<tr>
<td>Element</td>
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<tr>
<td>1</td>
<td>Source and apply information on the structure and operation of the event industry</td>
<td>1.1 Identify sources of information on the event industry correctly including information relating to:</td>
<td>This unit applies to any enterprise involved in event management. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• industry structure</td>
<td>Events refers to all types of events including:</td>
<td>Learning experiences for the HSC must address:</td>
<td></td>
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<tr>
<td></td>
<td>• different event types and staging elements</td>
<td>• conferences</td>
<td>Knowledge of events sector:</td>
<td></td>
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<tr>
<td></td>
<td>• event protocols</td>
<td>• symposia</td>
<td>• the structure and function of the sector</td>
<td></td>
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<td></td>
<td>• major industry bodies/associations</td>
<td>• exhibitions</td>
<td>• examples of businesses operating in the sector</td>
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<tr>
<td></td>
<td>• impacts of events on local economies</td>
<td>• festivals</td>
<td>• organisations within the sector including the Major Events Board of NSW.</td>
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<tr>
<td></td>
<td>• career opportunities</td>
<td>• promotions</td>
<td>Event types including:</td>
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<tr>
<td></td>
<td></td>
<td>• shows</td>
<td>• conferences</td>
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<td></td>
<td>• sporting events</td>
<td>• symposia</td>
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<td></td>
<td>• parades</td>
<td>• exhibitions</td>
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<td></td>
<td>• cultural celebrations</td>
<td>• festivals</td>
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<td>• trade and consumer shows</td>
<td>• promotions</td>
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<td>• social events</td>
<td>• shows</td>
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<td>• public events</td>
<td>• sporting events</td>
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<td></td>
<td>• corporate events</td>
<td>• parades</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• charitable, fund-raising events</td>
<td>• cultural celebrations</td>
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<td>• trade and consumer shows</td>
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<td>• social events</td>
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<td>• public events</td>
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<td>• corporate events</td>
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<td>• charitable, fund-raising events</td>
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<td>• events of world-wide significance.</td>
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<td>The interrelationship between events and other tourism industry sectors.</td>
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<td>Key stakeholders in decision-making and event organisation including:</td>
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<td>• host organisation</td>
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<td>• host community</td>
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<td>• media</td>
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<td>• participants</td>
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<td>• spectators/audience.</td>
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<td>Key motivations for hosting events:</td>
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<td>• celebrations of significance</td>
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<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
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</tbody>
</table>
| 1.2     | Use knowledge of the event industry in the correct context to enhance the quality of work performance. | | • commercial reasons  
• political reasons.  
Principal motivations for spectator/audience participation including:  
• socialisation/family togetherness  
• excitement/escape  
• event novelty.  
The positive and negative impact of events on local economies including:  
• social and cultural  
• tourism and economic  
• physical and environmental  
• employment and careers. |
| 2 | Source and apply information on ethical and legal issues for the event industry | 2.1 Obtain information on legal and ethical issues to assist effective work performance. | Legal issues in the context of events may include:  
• public liability  
• duty of care  
• licensing  
• risk management  
• occupational health and safety  
Ethical industry practices in the context of events may include:  
• commission procedures  
• bookings at venues  
• confidentiality  
• overbooking  
• sub-contracting  
• pricing. |
| | | | Learning experiences for the HSC must address:  
A basic understanding of the principles covered by the following:  
• Occupational Health and Safety Act 2000 NSW  
• Occupational Health and Safety Regulations (2001) NSW  
• Fair Trading Act 1987 NSW  
• Trade Practices Act 1974 (Cth)  
• Copyright Act 1968 (Cth) (amended 1984)  
• Trade Marks Act 1995 (Cth)  
• public liability  
• duty of care.  
Knowledge of the safety elements of staging an event. |
| | 2.2 Conduct day-to-day event organisation activities in accordance with legal obligations and ethical industry practices. | | Learning experiences for the HSC must address:  
The application of enterprise protocols in relation to:  
• public liability  
• duty of care  
• licensing  
• risk management  
• occupational health and safety  
• commission procedures |
<table>
<thead>
<tr>
<th>Element</th>
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</tr>
</thead>
</table>
| 3       | Source and apply information on event industry technology | 3.1 Obtain information on current and emerging technologies that impact on the event organisation process. | Technologies that impact on the event organisation process may relate to:  
- project management systems  
- delegate registration and tracking systems  
- CAD systems  
- Internal venue booking systems. | **Learning experiences for the HSC must address:**  
How to source current information about emerging technologies relevant to events management.  
Technologies including:  
- digital technology  
- multimedia  
- broadband  
- project management systems  
- delegate registration and tracking systems  
- CAD systems  
- internal venue booking systems. |
|         |                      | 3.2 Assess the potential effects of different technologies on the event organisation process. | | **Learning experiences for the HSC must address:**  
The effects of emerging technology on:  
- the marketing and promotion of events information  
- ways that consumers research event information  
- speed of processing event information  
- registration, ticketing and seating  
- access to national and international participants  
- sponsorship  
- special effects including fireworks  
- lighting and sound. |
|         |                      | 3.3 Apply knowledge of current and emerging technology in day-to-day work activities. | | **Learning experiences for the HSC must address:**  
The application of enterprise protocols and policies in relation to current and emerging technology. |
| 4       | Update event industry knowledge | 4.1 Identify and use a range of opportunities to update knowledge of the events industry. | Opportunities to update knowledge may include:  
- industry seminars  
- training courses  
- industry association membership  
- participation in events industry association activities  
- informal networking with colleagues  
- reading industry journals  
- web research. | **Learning experiences for the HSC must address:**  
How to source current information that is of relevance to the events sector.  
Information sources include:  
- industry seminars  
- training courses |
<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 4.2     | Monitor current issues of concern to the industry. | Learning experiences for the HSC must address: The importance of monitoring current issues of concern related to the event industry sector including:  
- funding of events  
- public liability  
- risk management  
- occupational health and safety  
- government policy  
- emerging technologies  
- environmental issues  
- social issues.  
How such issues may impact on the following:  
- local economic conditions  
- legal obligations  
- workplace conditions and employment opportunities. |  
- industry association membership  
- participation in events industry association activities  
- informal networking with colleagues  
- reading industry journals  
- Internet websites.  
Assessing the validity of sources of information. |
| 4.3     | Share updated knowledge with customers and colleagues as appropriate, and incorporate into day-to-day work activities. | Learning experiences for the HSC must address: Effective communication skills including:  
- active listening  
- questioning techniques  
- body language  
- language targeted to audience.  
Disseminating information through a variety of communication channels including:  
- direct mail  
- seminars  
- corporate websites/e-newsletters  
- call centre  
- one-on-one communication.  
How sharing information can improve:  
- promotion of events sector  
- customer service. |
### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>2</td>
<td>Deciding whether to join an industry association based on evaluation of promotional materials</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Liaising with clients on protocol requirements for a given event</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Organising a personal program of professional development activities for the upcoming year</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Discussing industry developments with colleagues</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Respond to situation organising a particular type of event that includes components of which you have no knowledge</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using the Internet to source information on the events industry</td>
</tr>
</tbody>
</table>
### Essential Knowledge and Skills to be Assessed

- the importance and role of protocol in different events and situations
- key sources of information on protocol
- main types of civic functions held in Australia
- the Australian Honours system including order of precedence, ranks and forms of address and wearing of honours and medals
- appropriate protocols for the involvement of indigenous Australians and other cultural groups in events
- correct use of national and State symbols including flags, anthems and military salutes
- forms of address for different VIPs and dignitaries, both for written correspondence and in oral communication
- protocol procedures for different types of function including:
  - invitations to VIPs
  - arrival procedures, including for heads of state or government officials
  - introduction protocols and order of speakers
  - order of precedence for official guests
  - seating arrangements
  - dress styles.

### Critical Aspects of Assessment

Evidence of the following is critical:
- knowledge of where to source accurate information on protocol for specific situations
- knowledge of protocols as specified under Essential Knowledge and Skills.

### Context of Assessment and Resource Implications

Assessment must ensure:
- project or work activities that allow the candidate to apply protocol knowledge to specific event management, tourism or hospitality situations.

### Assessment Methods

Assessment methods must be chosen to ensure that knowledge of protocol can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

#### Linkages with Other Units

This unit underpins effective performance in a range of event management and other roles within the tourism and hospitality industries. As such combined training and assessment with other units may be appropriate.

#### Key Terms and Concepts

- academics
- citizenship ceremonies
- civic functions
- Debrett’s Handbook of Australia (1991)
- dignitary
- diplomat
- dress standards
- forms of address
- government officials
- heads of state
- invitations
- military personnel
- nobility
- official guests
- order of precedence
- protocol
- protocols for the involvement of Indigenous Australians and other cultural groups in events
- royalty
- seating arrangements
- sources of information
- the Australian Honours system
- VIP (Very Important Person/People).
<table>
<thead>
<tr>
<th>Element</th>
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<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Seek information on appropriate protocol</td>
<td>1.1 Identify sources of accurate information on protocol correctly.</td>
<td>This unit applies to all tourism and hospitality enterprises. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances. Sources of information on protocol may include: - libraries - Internet - Federal, State and Local Government protocol departments - Aboriginal Land Councils - Australia Day Councils - Office of the United Nations.</td>
</tr>
<tr>
<td></td>
<td>1.2 Access relevant protocol information in response to workplace needs.</td>
<td></td>
<td>Learning experiences for the HSC must address: Sourcing and accessing protocol information relevant to the tourism industry and enterprise needs including: - social etiquette:  - greetings  - using names  - proper gestures  - eye contact  - dress  - topics to avoid - arranging meetings:  - sending invitations  - selecting venues  - receiving guests  - seating arrangements  - exchanging business cards  - addressing clients and customers  - business presentations  - follow-up. Knowledge and understanding of protocols and customs related to Aboriginal and Torres Strait Islander peoples.</td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
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<td>2</td>
<td><strong>Integrate appropriate protocol procedures into work activities</strong></td>
<td><strong>Identify the areas of work activity that require appropriate use of protocol in a timely manner.</strong></td>
<td><strong>Learning experiences for the HSC must address:</strong> Knowledge and understanding of the Australian Honours system including: • order of precedence • ranks and forms of address • wearing of honours and medals. Preparation of written communications to VIPs and official guests including: • invitations • general correspondence • official program. Verbal communication with VIPs and official guests including: • official greetings • formal introductions • liaison throughout the duration of an event. The importance and role of protocol in different events including: • civic receptions • formal parades • private functions.</td>
</tr>
<tr>
<td>2.1</td>
<td><strong>Integrate appropriate protocol procedures into work activities.</strong></td>
<td>Work activities that require integration of protocol may include: • issuing invitations • preparing running sheets • preparation of briefing papers • liaison with dignitaries and officials • correspondence to dignitaries and officials • providing various services during the conduct of an event (eg on-site management, service of food and beverage). Functions where protocols need to be used may include: • civic receptions • formal parades • freedom of city ceremonies • national day receptions • citizenship ceremonies • private functions.</td>
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<tr>
<td>2.2</td>
<td><strong>Integrate the correct use of protocol into work activities.</strong></td>
<td><strong>Learning experiences for the HSC must address:</strong> Using correct forms of address and titles in the following instances: • mailing address for written correspondence • opening salutation in written correspondence • spoken greetings • formal introductions. The importance of dress standards as they relate to a range of events and functions: • black tie • formal/after five • smart casual.</td>
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<td>2.3</td>
<td><strong>Liaise with colleagues and other stakeholders to determine appropriate protocol requirements.</strong></td>
<td><strong>Learning experiences for the HSC must address:</strong> Conducting research with colleagues and stakeholders to determine protocol requirements, specifically: • interviews • formal presentations • focus groups.</td>
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<tr>
<td>2.4</td>
<td>Provide appropriate information on protocol to relevant colleagues and stakeholders.</td>
<td>Learning experiences for the HSC must address: Disseminating information through a variety of channels including: • direct mail • seminars • corporate web sites/e-newsletters • call centre • one-on-one communication. Importance of using correct protocol in order to: • maintain professionalism • ensure quality service • promote products and services.</td>
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<tr>
<td>3</td>
<td>Update knowledge of protocol</td>
<td>Identify and use opportunities to update protocol knowledge.</td>
<td>Learning experiences for the HSC must address: Identifying opportunities for updating protocol knowledge including: • talking and listening to colleagues and customers • participation in official functions and ceremonies • seminars • personal observation.</td>
</tr>
<tr>
<td>3.1</td>
<td>Identify and use opportunities to update protocol knowledge.</td>
<td>Learning experiences for the HSC must address: Effective communication skills including: • active listening • questioning techniques • body language • language targeted to audience. The benefits of sharing ideas and discussing protocol issues with colleagues.</td>
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</table>
### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

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<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
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<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>2</td>
<td>Determining the protocol information required for a particular event</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Advising colleagues about protocol requirements for a given event</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Integrating protocol into event organisation activities</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Liaising with protocol officers from a government department</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Finding protocol information in relation to a totally unknown situation</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using the Internet to source protocol information</td>
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</tbody>
</table>
### Training Package

**Title:**

**Prepare quotations**

**Unit Code:**

| THTSOP05B |

**Unit Descriptor:**

This unit deals with the skills and knowledge required to calculate the costs of products and services accurately and to present quotations to customers. This unit applies to many sales staff across multiple tourism sectors including travel consultants, reservations sales agents and event co-ordinators or managers. Generally, this unit relates to the provision of quotations for products and services where some costing and pricing has already been undertaken in the product development phase. As such it underpins the unit THTPPD03B Source and package tourism products and services which deals with the more advanced skills to actually source, price and package product.

**HSC Indicative Hours:**

10

### Essential Knowledge and Skills to be Assessed

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

- product knowledge as appropriate to specific industry sector
- quotation systems and procedures as appropriate to the specific industry sector
- negotiated costs, contractual arrangements and preferred supplier arrangements in place
- industry commission/mark up procedures as appropriate to the specific industry sector
- legal and consumer protection issues in specific relation to providing quotations.

### Critical Aspects of Assessment

Evidence of the following is critical:

- ability to accurately cost and quote on a range of tourism products and services within enterprise acceptable timeframes
- knowledge of industry practices in relation to commissions and mark-up.

### Context of Assessment and Resource Implications

Assessment must ensure:

- demonstration of skills in preparing and providing quotations for multiple products and to meet different customer needs (ideally as a component of integrated work activity).
- demonstration of skills within a fully-equipped industry-realistic office environment using appropriate computers, printers, information programs and publications
- use of a full range of operational documentation eg. details of supplier contracts and customer files.
- the completion of co-ordinating quotations and maintaining files within timeframes and constraints that reflect typical industry practice.

### Assessment Methods

Assessment methods must be chosen to ensure that the skills required to prepare and provide quotations can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit:

- evaluation of integrated activities completed by the candidate (may include destinations, products, quotations and ticketing)
- case studies to assess ability to provide accurate quotations in response to particular customer requests or for a series of customer files
- written and oral questioning or interview to test knowledge of the principles which underpin quotation procedures and the consumer protection regulations which would apply
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### HSC Requirements and Advice

- commission
- contractual arrangements
- currency conversion
- customer records
- exclusion
- inclusion
- mark-up
- negotiated costs
- nett cost
- options
- preferred supplier
- product costing
- product and service knowledge
- quotation
- quotation system
- restriction
- secondary quotation
- selling price
- taxes.
<table>
<thead>
<tr>
<th>Linkages with Other Units</th>
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<tbody>
<tr>
<td>This unit must be assessed with or after the following unit. That unit describes skills and knowledge that are essential to this unit of competence:</td>
</tr>
<tr>
<td>• THTSOP03B Access and interpret product information</td>
</tr>
<tr>
<td>This unit also has strong linkages to other Sales and Office Operations units and combined training and assessment is recommended. Depending on the industry sector or enterprise context, this unit could be assessed with:</td>
</tr>
<tr>
<td>• THTSOP04B Sell tourism products and services</td>
</tr>
<tr>
<td>• THTSOP06B Receive and process reservations</td>
</tr>
<tr>
<td>• THTSOP08B Operate a computerised reservations system</td>
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<tr>
<td>• THHGCS05B Organise in-house functions</td>
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<td>Element</td>
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</table>
|         |                      | • special event consumable items  
|         |                      | • catering. | Interpret the content of a product costing including:  
|         |                      |                 | • supplier and agent details  
|         |                      |                 | • validity dates  
|         |                      |                 | • seasonality  
|         |                      |                 | • restrictions  
|         |                      |                 | • inclusions  
|         |                      |                 | • child and infant costing  
|         |                      |                 | • currency  
|         |                      |                 | • conditions of sale  
|         |                      |                 | • government and other taxes  
|         |                      |                 | • free of charge (FOC).  
|         |                      | Identify variations in pricing and interpret their application to:  
|         |                      | • transportation  
|         |                      | • accommodation  
|         |                      | • tours  
|         |                      | • admissions  
| 1.3     | If required, negotiate costs with suppliers in accordance with commercial agreements and relationships and level of responsibility held within the enterprise. |                 | • performances  
|         |                      |                 | • meals  
|         |                      |                 | • porterage/tips  
|         |                      |                 | • insurance.  
<p>| 1.4     | Calculate commissions or mark up nett costs in accordance with enterprise procedures and requirements to determine selling price. |                 | |
| 1.5     | Accurately calculate any additional taxes, special fees and other charges. |                 | |</p>
<table>
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</thead>
</table>
| 1.6     | Accurately calculate any required currency conversions. | Quotations may be for:  
- a single product or service  
- multiple products and services making up a complete itinerary  
- groups  
- individuals  
- one off touring arrangements  
- series tours  
- incentive tours  
- meetings  
- conferences.  | **Learning experiences for the HSC must address:**  
Calculation of currency conversion from Australian dollars into foreign currency and from foreign currency into Australian dollars using the Bank Selling Rate (BSR) and Bank Buying Rate (BBR). |
| 1.7     | Accurately calculate the final cost to the customer. | Quotations may be:  
- manually  
- using a computer.  | **Learning experiences for the HSC must address:**  
Combining component costs to provide a total per person cost for:  
- twin share  
- single  
- triple share  
- child twin  
- child as 3\textsuperscript{rd} person  
- infant  
- sole traveller  
- group. |
| 1.8     | Check all calculations and keep detailed and legible records of the method of calculation, in accordance with enterprise formats. | Quotations may be provided by:  
- telephone  
- fax  
- email or other electronic transmission  
- mail  
- internal communication.  | **Learning experiences for the HSC must address:**  
Accuracy, currency and legibility in the completion of client records.  
Industry accepted abbreviations and codes including:  
- confirmed (KK)  
- waitlisted (WL)  
- need (NN)  
- request (RQ)  
- ticketing time limit (TTL)  
- phonetic alphabet. |
| 2       | Provide quotations to customer |  
2.1     | Provide accurate quotations to customers in accordance with enterprise procedures and formats.  
- a computer file  
- a manual file.  | **Learning experiences for the HSC must address:**  
Methods of providing quotations to customers:  
- email  
- telephone  
- fax  
- letter  
- internal communication. |
<p>| 2.2     | Offer options with secondary quotations, as appropriate. |  |  |</p>
<table>
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</thead>
</table>
| 2.3     | Ensure that all quotations include accurate details on the following:  
• inclusions and exclusions  
• payment requirements  
• general conditions and rules  
• date of current quote, life/expiry date of quotation. | Learning experiences for the HSC must address:  
Presentation of quotations to customers in a structured format according to tourism industry and/or enterprise guidelines, including:  
• selling price  
• options as appropriate  
• inclusions and exclusions  
• payment requirements  
• general conditions and rules  
• date of current quote  
• life/expiry date of quotation. |  |
| 2.4     | Record all details of the quotation accurately and legibly and keep on file in accordance with enterprise procedures |  |  |
| 3       | Update and amend quotations |  | Learning experiences for the HSC must address:  
Updating and amending quotations as a result of:  
• change of date  
• change of product/services required  
• addition/reduction of services required  
• excessive exchange rate change  
• number in group  
• expiry of option(s)  
• late booking fee(s). |  |
| 3.1     | Adjust and update quotations to take account of changed requests or arrangements. | Learning experiences for the HSC must address:  
Provision of quotes to customers including:  
• date of preparation of quote  
• explanation of inclusions, exclusions and conditions  
• opportunity for customer questions. |  |
| 3.2     | Provide the most up-to-date quote to customers and ensure they are aware of the currency of the quote. |  |  |
| 3.3     | Record all details of adjusted quotes and keep on file in accordance with enterprise procedures. |  |  |
### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

- **Level 1** = Perform  
- **Level 2** = Administer and Manage  
- **Level 3** = Design and Evaluate

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
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<tbody>
<tr>
<td>Collecting, Organising and Analysing</td>
<td>2</td>
<td>Sourcing appropriate product and rate information, interpreting current product costs and conditions and evaluating the most appropriate fit for the customer.</td>
</tr>
<tr>
<td>Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Providing information to customers on the conditions specifically applicable to the products quoted to them.</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>2</td>
<td>Determining and working towards the customer’s quotation deadline.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Prioritising the order of quotations to be provided to various customers.</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Requesting information from product suppliers.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sharing newly released information with colleagues involved in quoting.</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>2</td>
<td>Calculating the net costs of various products and services and calculating a mark up to determine the selling price to the customer.</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Finding alternative products and costs to meet the customer’s needs when first offered cost is not suitable.</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using a calculator.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Using a computerised information system to ascertain costs, conditions and schedules.</td>
</tr>
<tr>
<td>Training Package</td>
<td>Tourism (THT02)</td>
<td>HSC Requirements and Advice</td>
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</tr>
<tr>
<td>Title:</td>
<td>Receive and process reservations</td>
<td></td>
</tr>
<tr>
<td>Unit Code</td>
<td>THTSOP06B</td>
<td></td>
</tr>
<tr>
<td>Unit Descriptor:</td>
<td>This unit deals with the skills and knowledge required to receive and process reservations for a tourism or hospitality product or service offered for sale to agents or direct to the consumer. The selling focus for reservations or call centre staff is found in unit THTSOP04B Sell tourism products and services. The use of a computerised reservations system is found within the unit THTSOP08B Operate a computerised reservations system.</td>
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</table>

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<thead>
<tr>
<th>Essential Knowledge and Skills to be Assessed</th>
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<th>Context of Assessment and Resource Implications</th>
<th>Assessment Methods</th>
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<tbody>
<tr>
<td>The following knowledge and skills must be assessed as part of this unit: • product knowledge as appropriate to the specific industry sector and product being sold • reservations and bookings terminology • relationships between different sectors of the tourism industry in relation to reservations and bookings including sources of reservations • principles which underpin reservations procedures.</td>
<td>Evidence of the following is critical: • ability to make accurate reservations in accordance with established systems and procedures and within enterprise acceptable timeframes • understanding of the different sources of reservations and the industry interrelationships that apply.</td>
<td>Assessment must ensure: • demonstration of skills in receiving and processing reservations for multiple product bookings and in response to differing customer needs (ideally as a component of integrated work activity). • demonstration of skills within a fully-equipped industry-realistic office environment using appropriate telephones, computers, printers and reservations systems • use of industry-current reservations documentation • the completion of processing reservation requests, and issuing of documentation within timeframes and constraints that reflect typical industry practice.</td>
<td>Assessment methods must be chosen to ensure that the skills required to receive and process reservations can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit: • direct observation of the candidate using reservations systems • evaluation of integrated activities completed by the candidate (may include destinations, products, quotations and ticketing) • evaluation of reservations documentation and booking data generated by the candidate activities to assess ability to process differing types of reservations including booking, retrieving and amending a series of bookings • written and oral questioning or interview to test knowledge of the principles which underpin reservations procedures and the relationships between different sectors of the tourism industry • review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Terms and Concepts</th>
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<tbody>
<tr>
<td>• computerised reservations system</td>
</tr>
<tr>
<td>• determining availability</td>
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<tr>
<td>• manual reservations system</td>
</tr>
<tr>
<td>• market segments</td>
</tr>
<tr>
<td>• product knowledge</td>
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<td>• reservation</td>
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<td>• reservations reports</td>
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<td>• selling strategy</td>
</tr>
<tr>
<td>• service operator</td>
</tr>
<tr>
<td>• special requests</td>
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<tr>
<td>• tourism enterprise terminology.</td>
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<tr>
<td>Linkages with Other Units</td>
</tr>
<tr>
<td>---------------------------</td>
</tr>
<tr>
<td>• THTSOP04B Sell tourism products and services</td>
</tr>
<tr>
<td>• THTSOP05B Prepare quotations</td>
</tr>
<tr>
<td>• BSBCMN205A Use business technology</td>
</tr>
<tr>
<td>• THHGGA01B Communicate on the telephone</td>
</tr>
<tr>
<td>• THHGGA02A Perform office procedures</td>
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<tr>
<td>Element</td>
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<td>---------</td>
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<tr>
<td>1 Receive reservation request</td>
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<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
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</thead>
<tbody>
<tr>
<td>1.2</td>
<td>Offer alternatives if the requested booking is not available including waitlist options.</td>
<td></td>
<td>Learning experiences for the HSC must address: Alternatives that could be offered to clients including: • different dates and/or departure times • different service and/or product range • waitlist options.</td>
</tr>
<tr>
<td>1.3</td>
<td>Accurately answer enquiries regarding costs and other product features.</td>
<td></td>
<td>Learning experiences for the HSC must address: The need for extensive product knowledge in relation to the enterprise including: • rates and types for coach, rail, air, sightseeing, rental vehicles, ship or cruise, accommodation, tour packages or travel insurance • market segments and appropriate rates • seasonal price variations • promotional packages and rates • enterprise facilities and services. Providing detailed information on all types of bookings and appropriate rates including: • rack rates • corporate rates • government rates • inbound rates • group package rates • special package rates • promotional rates • industry rates.</td>
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<tr>
<td>2</td>
<td>Record details of reservation</td>
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<tr>
<td>2.1</td>
<td>Accurately record customer details against their booking in a manner which ensures correct interpretation by others who may access the reservations details.</td>
<td></td>
<td>Learning experiences for the HSC must address: Record basic information: • name • type of service • times and/or day(s) of service • number of clients • choice of product • market/customer segment. Obtaining additional information including: • address (including postcode) • telephone/fax/email contact number • contact name • estimated time of arrival and mode of transport.</td>
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</table>
| 2.2     | Check for and make use of any customer profile or history, if available, and use information to assist in making the reservation and to enhance customer service. | Customer profiles, if available, may include:  
- full name and title  
- address  
- phone, fax email and other communication methods  
- special requirements  
- amount of business generated by the customer  
- usual method of payment. | Learning experiences for the HSC must address:  
Techniques for establishing client’s profile or history during initial reservation procedures. |
| 2.3     | Clearly record any special requests in accordance with enterprise requirements. | Customer records may be:  
- a computer file  
- a manual file. | Learning experiences for the HSC must address:  
Systems in place to ensure special requests are recorded and acted upon prior to client’s access of service.  
Types of special requests and need for specific details including:  
- meet-and-greet services  
- rail coach or sleeper services  
- manual or automatic vehicles  
- shore excursions  
- inside or outside cabins  
- optional sightseeing tours  
- meal requests  
- airport transfers  
- room types/views  
- disabled, non-smoking or child facilities. |
<table>
<thead>
<tr>
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</table>
| 2.4     | Confirm all details of the booking to the customer and ensure that they understand and agree to all details. | General and specific customer requirements/reservation details may include:  
- special requests  
- timing details  
- special needs  
- payment arrangements  
- information of a style of customer eg special interest group, VIP status  
- details of other services being used. | **Learning experiences for the HSC must address:**  
Information to be supplied and confirmed to client including:  
- service rate  
- guaranteed/confirmed booking procedures  
- time/s and date/s of service/s  
- payment methods and procedures  
- voucher/ticketing for services. |
| 2.5     | File the reservation in a manner which ensures easy access by others and in accordance with enterprise procedures. | Customer records may be:  
- a computer file  
- a manual file. | **Learning experiences for the HSC must address:**  
System for filing of reservations and associated documentation:  
- date of service  
- alphabetical order. |
| 2.6     | Prepare and issue documents and other materials to the customer in accordance with requirements of the specific reservation. | Documents issued to customers may include:  
- invoices  
- credit notes  
- receipts  
- service vouchers  
- confirmation letters  
- information packs. | **Learning experiences for the HSC must address:**  
Sending documents to clients including:  
- confirmation of services booked and confirmed  
- receipt for payment  
- destination and/or service information package. |
| 3       | Update reservations | | |
| 3.1     | Update the financial status of the reservation accurately and in accordance with enterprise procedures. | Updating the financial status of the reservation may include:  
- receiving, processing and recording payments  
- generating and issuing invoices and credit notes for changed reservations  
- checking that the reservation has been fully paid. | **Learning experiences for the HSC must address:**  
Updating the financial status of the reservation including:  
- calculating correct payments due  
- recording payments received  
- issuing invoices  
- recording deposits and final payments. |
| 3.2     | Receive, process and record any amendments to or cancellations of reservations in accordance with customer request and enterprise procedures. | Reservations systems may be:  
- manual  
- computerised  
Customer records may be:  
- a computer file  
- a manual file. | **Learning experiences for the HSC must address:**  
Handling cancellations:  
- locating original reservation  
- cancelling reservation in system  
- cancelling any associated special requests.  
Handling amendments:  
- locating original reservation  
- making appropriate alterations  
- amending any special requests if appropriate. |
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<tbody>
<tr>
<td>4.4.1</td>
<td>Communicate general and specific customer requirements and reservation details to appropriate departments and colleagues.</td>
<td></td>
<td>Learning experiences for the HSC must address:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Compiling and distributing client requirements to relevant service operators in order for all necessary service arrangements to be available when client arrives.</td>
</tr>
<tr>
<td>4.4.2</td>
<td>Compile and provide accurate and relevant reservation statistics on request.</td>
<td></td>
<td>Service operators would include:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Learning experiences for the HSC must address:</td>
<td>• coach companies</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• rail operators</td>
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<td></td>
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<td>• rental vehicle depots</td>
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<td>• shipping or cruise operators</td>
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<td></td>
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<td>• accommodation services</td>
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<td></td>
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<td>• package tour operators</td>
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<tr>
<td></td>
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<td></td>
<td>• travel insurance companies.</td>
</tr>
</tbody>
</table>

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

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<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
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<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>1</td>
<td>Checking the availability of the requested product and checking that the customer’s requirements can be met.</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Providing clear information to the customer about the confirmed reservation and the conditions of sale.</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Prioritising the sequence of received reservations and actioning these to ensure the request is confirmed within the required deadline.</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Providing reservation information and statistics to others in the sales team.</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>1</td>
<td>Using a computer reservations system to calculate the total costs of the reservation.</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Checking for appropriate alternative options to offer the customer when their first choice is unavailable.</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using a computerised reservation system.</td>
</tr>
</tbody>
</table>
### Training Package
Tourism (THT02)

### Title:
Process non-air documentation

### Unit Code
THTSOP09B

### Unit Descriptor:
This unit deals with the skills and knowledge required to process a range of documentation commonly used or issued within the tourism industry. It does not include documentation for air travel which is covered by the Unit THTSOP18A Process air documentation.

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</tr>
</thead>
</table>
| The following knowledge and skills must be assessed as part of this unit:  
- procedures and principles that underpin the processing of documentation  
- documentation types and standard formats used in the tourism industry  
- basic product knowledge as appropriate to specific industry sector  
- relationships between different sectors of the tourism industry in relation to requirements for and acceptance of tourism documentation  
- basic understanding of the negotiated costs, contractual arrangements preferred supplier arrangements in place  
- interpretation of the customer’s requirements  
- interpretation of any quotations previously supplied to customer. | Evidence of the following is critical:  
- ability to correctly interpret the customer’s requirements and specific services confirmed to the customer  
- ability to correctly issue/process accurate tourism documentation within enterprise acceptable timeframes  
- understanding of the principles that apply to the processing of any type of documentation. | Assessment must ensure:  
- demonstration of skills in processing tourism documentation for multiple reservations or bookings and for multiple different customers (ideally as a component of integrated work activity).  
- demonstration of skills within a fully-equipped industry-realistic office environment using appropriate computers, printers and systems currently used in the tourism industry to control documentation functions  
- use of industry-current customer file types and reservations data as the basis for the issuing of documentation  
- use of industry-current document pro-formas, ticket or voucher types  
- issuing of documentation within timeframes and constraints that reflect typical industry practice. | Assessment methods must be chosen to ensure that the skills required to process tourism documentation can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.  
The following examples are appropriate for this unit:  
- evaluation of integrated activities completed by the candidate (may include destinations, products, quotations and ticketing)  
- review of documents processed by the candidate  
- written and oral questioning or interview to test knowledge of the principles which underpin the issuing of documentation, the requirements for various types of documents and the relationships between different sectors of the tourism industry  
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate. | Key Terms and Concepts  
- billing cycle  
- commissions  
- conditions of sale  
- cross-checking skills  
- customer-based documentation  
- debt collection  
- debtor reconciliation  
- distribution strategy  
- famils (familiarisation tours)  
- outstanding debts  
- preferred product arrangements  
- proofreading  
- readability/legibility  
- reservation data  
- sources of product information  
- supplier-based documentation  
- transcription skills. |
### Linkages with Other Units

This unit must be assessed with or after the following unit. That unit describes skills and knowledge that are essential to this unit of competence:
- THTSOP03B Access and interpret product information

This unit has strong linkages to the range of Sales and Office Operations units and combined assessment is recommended. Depending on the industry sector or enterprise context, this unit could be assessed with:
- THTSOP05B Prepare quotations
- THTSOP07B Book and co ordinate supplier services
- THTSOP08B Operate a computerised reservations system
- THTSOP18A Process air documentation
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<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
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</thead>
</table>
| 1.1     | Identify deadline for preparation and despatch of documents. | This unit applies to all tourism industry sectors and enterprises where travel and tourism documents are issued to customers and/or tour delivery staff. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances. Documentation may be produced for:  
- a single product or service  
- multiple products and services making up a complete itinerary  
- groups  
- individuals  
- guests/delegates  
- one off touring arrangements  
- series tours  
- incentive tours  
- meetings  
- conferences. | Learning experiences for the HSC must address:  
Customer-based documentation:  
- tickets  
- vouchers  
- insurance policies  
- travellers cheques  
- itineraries.  
Supplier-based documentation:  
- sales returns  
- commission vouchers  
- booking forms. |
| 1.2     | Interpret existing reservation data held for the customer to correctly identify all customer details. | Customer reservation data may be:  
- a computer file  
- a manual file.  
Customer details may include:  
- name  
- age  
- special requirements to be noted on documents  
- agent’s details  
- address for delivery of documents  
- date for required delivery of documents. | Learning experiences for the HSC must address:  
Accessing manual reservation data to check customer details including:  
- name  
- age  
- special requirements to be noted on documents  
- agent’s details  
- address for delivery of documents  
- date for required delivery of documents. |
| 1.3     | Identify and correctly interpret details of specific products and services which have been sold and confirmed to the customer. | Products and services may be:  
- domestic  
- international. | Learning experiences for the HSC must address:  
Access and interpret information required for the completion of documentation for customers including:  
- times  
- availability of services  
- costs/fares  
- conditions  
- service identification  
- inclusions and exclusions  
- acceptable codes  
- terminology. |
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<tr>
<td></td>
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<td></td>
<td>Explaining conditions of sale including:</td>
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<td>• scheduling details</td>
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<td></td>
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<td>• inclusions, exclusions and optional product components</td>
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<td>• conditions, rules and legal issues</td>
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<td>• costings</td>
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<td>• booking and confirmation procedures</td>
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<td>• deposit, payment and cancellation procedures</td>
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<td>• product codes</td>
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<td></td>
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<td></td>
<td>• specifications of service providers.</td>
</tr>
<tr>
<td>1.4</td>
<td>Identify confirmed bookings held for customers and costs quoted by product and service suppliers.</td>
<td>Suppliers may be either:</td>
<td></td>
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<td></td>
<td></td>
<td>• internal or</td>
<td>Learning experiences for the HSC must address:</td>
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<tr>
<td></td>
<td></td>
<td>• external to the organisation.</td>
<td>Assisting customers to complete the following forms:</td>
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<td></td>
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<td>• passport application</td>
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<td>• visa application</td>
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<td></td>
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<td>• booking forms.</td>
</tr>
<tr>
<td>1.5</td>
<td>Identify sources of any general information required to correctly issue all required documents.</td>
<td>General sources of information required to correctly issue all required documents may include:</td>
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<tr>
<td></td>
<td></td>
<td>• timetables</td>
<td>Learning experiences for the HSC must address:</td>
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<tr>
<td></td>
<td></td>
<td>• brochures</td>
<td>How to access and validate sources of information relevant to the issuing of documents.</td>
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<td></td>
<td></td>
<td>• price schedules</td>
<td>Sources of tourism information including:</td>
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<td>• contracts with suppliers</td>
<td>• computerised reservation system</td>
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<td></td>
<td>• computerised reservation system</td>
<td>• Internet</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• database of product suppliers and their details</td>
<td>• brochures</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Internet sites</td>
<td>• electronic media</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• visa guides.</td>
<td>• price schedules</td>
</tr>
<tr>
<td>1.6</td>
<td>Check payment status and take appropriate action.</td>
<td>Actioning payments required by the supplier may involve:</td>
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<tr>
<td></td>
<td></td>
<td>• requesting payment from the accounts department eg cheque requisition or purchase order</td>
<td>Learning experiences for the HSC must address:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• self administering the payment:</td>
<td>Actioning payments required by the supplier including:</td>
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<tr>
<td></td>
<td></td>
<td>• issuing a miscellaneous charges order</td>
<td>• cheque requisition or purchase order</td>
</tr>
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<td></td>
<td>• sending payment by cheque, electronic transmission.</td>
<td>• self administering the payment</td>
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<td></td>
<td>• issuing a miscellaneous charges order</td>
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<td></td>
<td></td>
<td></td>
<td>• sending payment by cheque and electronic transmission</td>
</tr>
<tr>
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</tbody>
</table>
| 1.7     | Check for and report any discrepancies in costs quoted to the customer and actual cost of services and take any follow up action required to collect any shortfall. |  | Learning experiences for the HSC must address:  
Checking procedures:  
• cross-referencing final accounts to quote  
• proofreading  
• verifying calculations.  
Reasons for variances between final costs and initial quotes.  
Customer service issues related to payments including:  
• advising customer of additional amounts owing  
• handling customer objections  
• extended payment options  
• penalties for late or non-payment. |
| 2.1     | Prepare complete and accurate documentation within designated timeframes. | Documentation may include:  
• accommodation vouchers  
• bus/coach or other form of transportation tickets  
• car hire/motor home vouchers  
• cruise vouchers  
• tour vouchers  
• vouchers for attraction/theme park entry  
• vouchers for any tourism product or service  
• meeting or event confirmation letters  
• delegate information packs  
• travel insurance documentation  
• confirmation vouchers  
• commission vouchers  
• visa forms  
• visas  
• passport forms  
• travellers cheque requests  
• passenger itineraries  
• operational itineraries for crew eg Tourist Guide, Drivers, Tour Managers  
• briefing notes for crew  
• passenger lists  
• rooming lists  
• proformas  
• sales returns.  
Documents may be produced:  
• manually  
• using a computer | Learning experiences for the HSC must address:  
Documentation includes:  
• vouchers for any tourism product or service  
• tickets (non-air)  
• meeting or event confirmation letters  
• delegate information packs  
• travel insurance documentation  
• commission vouchers  
• visas  
• passport forms  
• travellers cheque requests  
• passenger itineraries  
• briefing notes for crew  
• passenger lists.  
Enterprise policy in terms of:  
• commissions  
• preferred product arrangements. |
<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2</td>
<td>Record all required details with complete accuracy on all documentation.</td>
<td>Learning experiences for the HSC must address: Preparing documents manually including the following: • transcription skills • cross-checking skills • readability/legibility issues. Pros and cons of preparing manual and computer-generated documents.</td>
<td></td>
</tr>
<tr>
<td>2.3</td>
<td>Make appropriate calculations and record any required costs on documents.</td>
<td>Learning experiences for the HSC must address: Calculations including: • subtotal • net total • GST • discounts • special offers • full rates • child rates • student rates • penalties.</td>
<td></td>
</tr>
<tr>
<td>2.4</td>
<td>Action any payment required by the supplier at the appropriate time in accordance with enterprise procedures.</td>
<td>Actioning payments required by the supplier may involve: • requesting payment from the accounts department eg cheque requisition or purchase order • self-administering the payment: • issuing a miscellaneous charges order • sending payment by cheque, electronic transmission.</td>
<td>Learning experiences for the HSC must address: Payment details including: • requesting payment from the accounts department • self-administering the payment • issuing a miscellaneous charges order • sending payment by cheque and electronic transmission.</td>
</tr>
<tr>
<td>2.5</td>
<td>Check all documentation for accuracy prior to issue and amend as necessary.</td>
<td>Learning experiences for the HSC must address: Checking all aspects of documentation including: • reading for meaning • proofreading • verifying calculations • obtaining required authorisations.</td>
<td></td>
</tr>
<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
<td>HSC Requirements and Advice</td>
</tr>
<tr>
<td>---------</td>
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<td>-----------------------------</td>
</tr>
</tbody>
</table>
| 2.6     | Process, file and despatch copies of documents in accordance with enterprise and supplier procedures and requirements. | Copies of documents may be supplied to:  
- the file  
- the accounts department  
- operational personnel involved in the delivery of a tour eg tourist guide, driver  
- the supplier of the service. | Learning experiences for the HSC must address:  
Issuing completed documents according to industry and enterprise standards including:  
- meeting timelines  
- recording accurate details  
- making correct calculations. |
| 2.7     | Despatch documents according to customer and enterprise requirements. | Learning experiences for the HSC must address:  
Issuing completed documents according to industry standards and customer expectations.  
Enterprise distribution strategy. |

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

<table>
<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>1</td>
<td>Interpreting a customer file and ascertaining which specific services need to be documented.</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Providing clear information to the customer and the supplier on vouchers and itineraries</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Prioritising the sequence of files to be documented and actioning these to ensure the documents are issued within the required deadline.</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Assisting with the work overflow of other personnel involved in issuing documents</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>1</td>
<td>Calculating the costs of vouchers and ensuring they match any previously confirmed rates</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Reorganising the work schedule to accommodate any late urgent requests to issue documents</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Using a computerised booking system to issue documents</td>
</tr>
<tr>
<td>Training Package</td>
<td>Tourism (THT02)</td>
<td>HSC Requirements and Advice</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Title:</td>
<td>Provide on-site information and assistance</td>
<td></td>
</tr>
<tr>
<td>Unit Code</td>
<td>THTFAT01B</td>
<td>HSC Indicative Hours: 10</td>
</tr>
<tr>
<td>Unit Descriptor:</td>
<td>This unit deals with the skills and knowledge required to access and interpret information on the attraction’s current activities, to provide assistance to customers and to promote the attraction’s services. This unit applies to operational staff working in attractions but may also be relevant to similar enterprises such as resorts.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Essential Knowledge and Skills to be Assessed</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following skills and knowledge must be assessed as part of this unit:</td>
</tr>
<tr>
<td>- sources of customers for an attraction/theme park and the role of attractions/theme parks within the tourism industry</td>
</tr>
<tr>
<td>- the roles of different departments within an attraction/theme park</td>
</tr>
<tr>
<td>- information systems within attractions/theme parks for both customers and staff.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Critical Aspects of Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evidence of the following is critical:</td>
</tr>
<tr>
<td>- knowledge of the role of attractions and theme parks within the tourism industry</td>
</tr>
<tr>
<td>- knowledge of and ability to use information systems within attractions/theme parks</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Context of Assessment and Resource Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment must ensure:</td>
</tr>
<tr>
<td>- project or work activities that allow the candidate to provide information on one or more attractions to meet varying customer needs</td>
</tr>
<tr>
<td>- interaction with others in the provision of information to demonstrate the appropriate interpersonal skills</td>
</tr>
<tr>
<td>- use of current attraction product information documents.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment methods must be chosen to ensure that the skills required to provide on site information and assistance can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills. The following examples are appropriate for this unit:</td>
</tr>
<tr>
<td>- direct observation of the candidate providing assistance and information</td>
</tr>
<tr>
<td>- case studies to assess ability to source a range of different types of information for different purposes</td>
</tr>
<tr>
<td>- written and oral questioning or interview to test knowledge of the sources of information and the role of information systems within the attraction or theme park</td>
</tr>
<tr>
<td>- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Linkages with Other Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>This unit has strong linkages to the range of Attractions and Theme Park units. It underpins effective performance in a range of operational activities and combined assessment is recommended. Depending on the enterprise circumstances, this unit could be assessed with any of the attractions and theme park units and could also be assessed with other units such as:</td>
</tr>
<tr>
<td>- THHICOR01B Work with colleagues and customers</td>
</tr>
<tr>
<td>- THHGCS01B Develop and update local knowledge.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Terms and Concepts</th>
</tr>
</thead>
<tbody>
<tr>
<td>attraction</td>
</tr>
<tr>
<td>attraction/theme park</td>
</tr>
<tr>
<td>information</td>
</tr>
<tr>
<td>colleague</td>
</tr>
<tr>
<td>communication skills</td>
</tr>
<tr>
<td>customer needs</td>
</tr>
<tr>
<td>customer service</td>
</tr>
<tr>
<td>occupational health and safety</td>
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<tr>
<td>product</td>
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<tr>
<td>promotion</td>
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<tr>
<td>selling techniques</td>
</tr>
<tr>
<td>service</td>
</tr>
<tr>
<td>theme park.</td>
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<tr>
<td>Element</td>
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<tr>
<td>---------</td>
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<tr>
<td>1</td>
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<td></td>
</tr>
<tr>
<td>Element</td>
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</tbody>
</table>
| 2       | **Provide assistance and information** | 2.1 Identify information and assistance needs of different customers accurately, including those with special needs or disabilities. | Information and assistance provided to customers may include:  
- general information on the attraction or theme park  
- times of activities or events  
- directions within the venue  
- facilities for those with special needs. | Learning experiences for the HSC must address:  
Establishing customer needs through active listening and using:  
- open questions  
- closed questions  
- reflective questions.  
Matching the needs of customers with the most relevant information and/or suitable assistance by:  
- knowing your customer  
  - families  
  - domestic tourists  
  - international tourists  
  - local residents  
  - customers with special needs  
  - young children  
  - teenagers  
  - business delegates  
  - media  
- knowing your product and/or service.  
Information and assistance for customers including:  
- general information on the attraction or theme park  
- times of activities or events  
- directions within the venue  
- facilities for those with special needs  
  - mobility-impaired  
  - sight-impaired  
  - hearing-impaired  
  - parents with babies. |  
Learning experiences for the HSC must address:  
Effective responses to a range of different customer service situations. |
|         | 2.2 Provide customers with required and requested information and assistance. | | |
### Element Performance Criteria

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
<th>Range Statement</th>
<th>HSC Requirements and Advice</th>
</tr>
</thead>
</table>
| 2.3     | Consider health and safety requirements and enterprise customer service standards when providing information and assistance. |  | Learning experiences for the HSC must address:  
Awareness of occupational health and safety guidelines.  
Importance of quality customer service and professional work ethic. |
| 2.4     | Promote services available within the attraction/theme park to customers. |  | Learning experiences for the HSC must address:  
Promoting products and services including:  
- developing knowledge of products and services  
- selling techniques  
  - up-selling  
  - suggestive selling. |

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

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<thead>
<tr>
<th>Key Competencies</th>
<th>Level</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>1</td>
<td>Collecting and reviewing current product information sheets for the attraction and understanding their content.</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>1</td>
<td>Providing information on and promoting a new internal venue within an attraction to customers.</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>1</td>
<td>Setting up a reference manual for all the types of activities happening within the attraction.</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>1</td>
<td>Sharing information with colleagues about a new product or service operating within the attraction.</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>1</td>
<td>Providing a simple quote on any extra costs a customer might incur once inside the attraction.</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>1</td>
<td>Assisting lost visitors to find the correct internal venue within an attraction.</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Providing information on and promoting a new internal venue within an attraction to customers.</td>
</tr>
<tr>
<td>Essential Knowledge and Skills to be Assessed</td>
<td>Critical Aspects of Assessment</td>
<td>Context of Assessment and Resource Implications</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>---------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Evidence of the following is critical:</td>
<td>Assessment must ensure:</td>
<td>Assessment methods must be chosen to ensure</td>
</tr>
<tr>
<td>- knowledge of the protocols that apply to</td>
<td>- involvement of appropriate</td>
<td>that the ability to source and share information</td>
</tr>
<tr>
<td>researching and sharing information</td>
<td>people accepted by the local</td>
<td>in a culturally appropriate way can be</td>
</tr>
<tr>
<td>generally available about Australian</td>
<td>community in the assessment</td>
<td>practically demonstrated. Methods must</td>
</tr>
<tr>
<td>Indigenous cultures</td>
<td>process</td>
<td>include assessment of knowledge as well as</td>
</tr>
<tr>
<td>- protocols for sharing information</td>
<td>- interaction with Australian</td>
<td>assessment of practical skills.</td>
</tr>
<tr>
<td>about Australian Indigenous cultures</td>
<td>Indigenous Communities to</td>
<td>The following examples are appropriate for</td>
</tr>
<tr>
<td>- ability to research and share</td>
<td>obtain information</td>
<td>this unit:</td>
</tr>
<tr>
<td>information in a culturally appropriate</td>
<td>- sharing of information with</td>
<td>- direct observation of the candidate</td>
</tr>
<tr>
<td>way</td>
<td>a customer group within a</td>
<td>sharing information about Australian</td>
</tr>
<tr>
<td>- general knowledge of Australian</td>
<td>commercially-realistic and</td>
<td>Indigenous culture with customers</td>
</tr>
<tr>
<td>Indigenous cultures as appropriate</td>
<td>operational guiding environment (eg at a tourist site, on a coach tour).</td>
<td>- oral or written questions or interview to</td>
</tr>
<tr>
<td>to the region.</td>
<td></td>
<td>evaluate the process undertaken by the</td>
</tr>
<tr>
<td>- Assessment must take account of the fact</td>
<td></td>
<td>candidate to source information</td>
</tr>
<tr>
<td>that some guides may have gained all of</td>
<td></td>
<td>- case studies to assess ability to apply</td>
</tr>
<tr>
<td>their knowledge and skill in this unit</td>
<td></td>
<td>correct protocols to particular situations</td>
</tr>
<tr>
<td>through general life experience.</td>
<td></td>
<td>- oral or written questions to assess</td>
</tr>
<tr>
<td></td>
<td></td>
<td>knowledge of protocols and other issues</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- review of portfolios of evidence and third</td>
</tr>
<tr>
<td></td>
<td></td>
<td>party workplace reports of on-the-job</td>
</tr>
<tr>
<td></td>
<td></td>
<td>performance by the candidate.</td>
</tr>
</tbody>
</table>

This unit deals with the skills and knowledge required to research and share information about Australian Indigenous societies in a culturally appropriate way. It focuses on information that is widely available to the general community. The unit recognises that there is no single Australian Indigenous culture and emphasises the importance of culturally appropriate behaviour and local community consultation. This unit does not include in-depth interpretation of local Australian Indigenous cultures.
<table>
<thead>
<tr>
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<th>HSC Requirements and Advice</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Research general information on Australian Indigenous cultures</td>
<td>Identify sources of information about Australian Indigenous cultures correctly.</td>
<td>This unit applies to guides working in all sectors of the tourism industry. The following lists and statements identify how this unit may be applied in different workplaces, sectors and circumstances. In this unit, information refers to the range of information that is generally available to the wider community. Research may include: • talking and listening to Australian Indigenous people • organising information from personal memory and experiences • watching TV, videos and films • listening to radio • reading books and other references • Internet • museum research.</td>
</tr>
<tr>
<td>1.1</td>
<td>Identifying sources of information accurately.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2</td>
<td>Interpreting written sources of information accurately, extract the required information and check with local communities prior to use.</td>
<td>Information may be about: • Australian Indigenous countries across Australia • specific Australian Indigenous countries. Information may cover but is not limited to the following topics: • history, pre and post European contact • traditional life and culture • contemporary indigenous life and culture • art and music • dance • bushcraft/bushfood/bush medicine • tools and implements • land ownership • cultural sites.</td>
<td></td>
</tr>
<tr>
<td>1.3</td>
<td>Accessing information from other than written sources in a culturally appropriate way.</td>
<td>Research may include: • talking and listening to Australian Indigenous people • organising information from personal memory and experiences • watching TV, videos and films • listening to radio • reading books and other references • Internet • museum research.</td>
<td></td>
</tr>
<tr>
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</tr>
</tbody>
</table>
| 1.4 | Contact appropriate community members and seek guidance on how information should be used in a tourism context. | Information may be about:  
• Australian Indigenous countries across Australia  
• specific Australian Indigenous countries.  
Information may cover but is not limited to the following topics:  
• history, pre and post European contact  
• traditional life and culture  
• contemporary indigenous life and culture  
• art and music  
• dance  
• bushcraft/bushfood/bush medicine  
• tools and implements  
• land ownership  
• cultural sites. | This optional unit can only be delivered after having approval from your relevant school authority. |
| 1.5 | Demonstrate behaviour which shows respect for local Australian Indigenous culture and customs and follow correct protocols when seeking information. | Cultural sites may include:  
• galleries  
• cultural centres  
• natural sites  
• occupation sites (eg middens). |
| 1.6 | Share knowledge gained with work colleagues to increase cultural awareness and understanding in the organisation | |
| 2 | Share general information with customers on Australian indigenous cultures | 2.1 Identify and use indigenous interpreters where possible and within scope of individual responsibility. | |
| | | 2.2 Provide customers with guidance on appropriate behaviours when interacting with indigenous interpreters or communities. | |
| | | 2.3 Share accurate information with customers. | Information may be about:  
• Australian Indigenous countries across Australia  
• specific Australian Indigenous countries.  
Information may cover but is not limited to the following topics:  
• history, pre and post European contact  
• traditional life and culture |
<table>
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<th>Range Statement</th>
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</tr>
</thead>
</table>
| 2.4     | Include reference to the diversity of Australian indigenous cultures when sharing information. | • contemporary indigenous life and culture  
• art and music  
• dance  
• bushcraft/bushfood/bush medicine  
• tools and implements  
• land ownership  
• cultural sites. | This optional unit can only be delivered after having approval from your relevant school authority. |
| 2.5     | Share information in a manner which shows respect for local community values and customs. |  |
| 2.6     | Share information in a manner which enhances customer understanding of Australian indigenous cultures. |  |
| 2.7     | Answer customer questions in a polite and friendly manner and in accordance with community wishes about what information can be shared with customers. |  |
| 2.8     | Respond to culturally inappropriate customer behaviour promptly and in a manner that minimises the likelihood of offence being taken by all parties. |  |

**Key Competencies in this Unit**

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</tr>
</thead>
<tbody>
<tr>
<td>Collecting, Organising and Analysing Information</td>
<td>3</td>
<td>Collecting, evaluating and checking information from different sources</td>
</tr>
<tr>
<td>Communicating Ideas and Information</td>
<td>3</td>
<td>Answering a customer question on a topic of great cultural sensitivity for the local Australian Indigenous community</td>
</tr>
<tr>
<td>Planning and Organising Activities</td>
<td>2</td>
<td>Organising a research program in preparation for a specific tour focussing on Australia’s Indigenous culture</td>
</tr>
<tr>
<td>Working with Others and in Teams</td>
<td>3</td>
<td>Developing and maintaining rapport with representatives of the local Australian Indigenous community</td>
</tr>
<tr>
<td>Using Mathematical Ideas and Techniques</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Solving Problems</td>
<td>3</td>
<td>Dealing with inappropriate customer behaviour at a cultural site</td>
</tr>
<tr>
<td>Using Technology</td>
<td>1</td>
<td>Recording information on a computer</td>
</tr>
</tbody>
</table>