

<b>Title</b>	<b>Provide quotations, complete reservations, and process travel arrangements for customers in a retail travel environment</b>		
<b>Level</b>	<b>4</b>	<b>Credits</b>	<b>10</b>

<b>Purpose</b>	People credited with this unit standard are able to: establish customer travel requirements and produce an itinerary and quotation; complete travel reservations; process payments and documentation for travel arrangements; and distribute travel documentation or brief customer and complete follow up. This unit standard is intended for people who have customer interactions in a retail travel environment.
----------------	--

<b>Classification</b>	Tourism > Travel
-----------------------	------------------

<b>Available grade</b>	Achieved
------------------------	----------

---

### Guidance Information

- Competency in this unit standard must be demonstrated using a computer reservation system and travel management system which have the capability of processing comprehensive travel requirements. A theoretical knowledge of these computerised systems is not sufficient to gain competency.
- Definitions
 

*Client profiles* for the purpose of this unit standard are for recording information that directly relates to a customer, which assists the travel agent when making travel arrangements for that customer.

*Mandatory fields* refer to those fields within the travel management system which must be completed as specified by the supplier of the travel management system or travel industry workplace policies and procedures.

*Suppliers*, in the context of this unit standard, may include wholesalers or direct suppliers.

*Travel industry workplace policies and procedures* refer to documented instructions about workplace expectations. These may include but are not limited to – customer service delivery, personal presentation, legislation, organisational structure, business objectives.

*Travel management system* refers to any computer system used in the travel industry capable of managing client, booking, and financial details, and interfacing with a computer reservation system. Examples of travel management systems may include but are not limited to – Sabre Agency Manager (SAM), Cross Check Travel (CCT), Tramada.
- Recommended knowledge and skills: Unit 25507, *Use a travel management system to manage client files and process travel arrangements for clients*, or demonstrate equivalent knowledge and skills.

- 4 Evidence is required for three different client files, each of which must contain at least three different components. Components may include but are not limited to – flights, transfers, accommodation, rental cars, coach tours, rail travel, ferries, sightseeing tours, travel insurance, foreign exchange.
- 5 For assessment purposes, a client file cannot be completed in one day. Competence must be demonstrated over a minimum of three days.
- 6 Any relevant Acts, regulations, and bylaws must be complied with during assessment against this standard. Legislation relevant to this unit standard may include but is not limited to – Commerce Act 1986, Consumer Guarantees Act 1993, Contract and Commercial Law Act 2017, Employment Relations Act 2000, Fair Trading Act 1986, Health and Safety at Work Act 2015, Human Rights Act 1993, Privacy Act 1993.
- 7 This unit standard may be assessed against in a travel industry workplace when appropriate situations arise, or in a training environment if simulated workplace conditions are able to be provided that reflect the standards of a travel industry workplace.
- 8 All assessment tasks for performance criteria are to be carried out in accordance with travel industry workplace policies and procedures.

---

## Outcomes and performance criteria

### Outcome 1

Establish customer travel requirements and produce an itinerary and quotation.

#### Performance criteria

- 1.1 The customer is greeted.
- 1.2 Information obtained from the customer enables their needs, preferences, and expectations to be determined.
 

Range	examples of needs – urgency of travel, class of travel, special meals; examples of preferences – airlines, airline seating, hotels, rental car companies; examples of expectations – to experience another culture, to experience something new, timeframe of itinerary and quotation production, professional service; evidence is required of two each of needs, preferences and expectations.
-------	---
- 1.3 Customer is advised of additional products and services that may enhance their itinerary.

- 1.4 Client profile is created in the travel management system, or existing information is checked.
- Range may include but is not limited to – personal details (full name, address, contact details, date of birth, passport type (copy of passport requested), any special visa requirements, special service requirements, airline frequent flyer programmes, company details (name, address, contact details, preferred suppliers), trip details (travel dates, special requests); evidence is required for all mandatory fields.
- 1.5 Itinerary is tailored to match customer needs, preferences, and expectations, and a quotation is prepared.
- 1.6 Itinerary and quotation are communicated to the customer.
- Range must include – terms and conditions of booking (deposit, amendment fees, cancellation fees), service fees, validity of quotation.
- 1.7 Follow-up with the customer is completed.
- Range may include but is not limited to – apply appropriate sales techniques to obtain the sale (direct close), provide additional information to overcome objections, advise flight availability; evidence of two is required.

## Outcome 2

Complete travel reservations.

### Performance criteria

- 2.1 Reservations are made in accordance with customer and supplier requirements.
- 2.2 Reservation details are uploaded or manually loaded into the travel management system.
- 2.3 Alternatives are offered in the case of unavailability.
- Range evidence is required for an alternative for at least one client file.
- 2.4 Costings are loaded, checked or amended in the travel management system.
- 2.5 Status of the reservations is communicated to the customer.
- Range must include – terms and conditions of booking (amendment fees, cancellation fees), insurance offered (acknowledge if declined), any visa requirements advised, service fees, balance, balance due date.

2.6 A difficult situation is dealt with.

Range may include but is not limited to – non-availability of confirmed services, angry or distressed customers, customer complaints, delays in service, currency fluctuations, dealing with situations where errors are made by a third party; evidence is required for a difficult situation for at least one client file.

**Outcome 3**

Process payments and documentation for travel arrangements.

**Performance criteria**

3.1 Client payments or supplier payments are processed via the travel management system.

3.2 Documentation is requested or issued in accordance with suppliers' requirements.

Range documentation may include but is not limited to – e-tickets, vouchers, itineraries.

3.3 Documentation is checked and prepared for the customer.

**Outcome 4**

Distribute travel documentation or brief customer and complete follow-up.

**Performance criteria**

4.1 Documentation is distributed to the customer or pre-travel briefing is completed.

4.2 After sales service is provided to the customer.

<b>Replacement information</b>	This unit standard replaced unit standard 18225 and unit standard 18283.
--------------------------------	--

<b>Planned review date</b>	31 December 2025
----------------------------	------------------

**Status information and last date for assessment for superseded versions**

Process	Version	Date	Last Date for Assessment
Registration	1	20 February 2009	31 December 2018
Review	2	16 February 2017	31 December 2022
Review	3	26 November 2020	N/A

<b>Consent and Moderation Requirements (CMR) reference</b>	0112
--	------

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

**Comments on this unit standard**

Please contact ServicelQ [qualifications@ServicelQ.org.nz](mailto:qualifications@ServicelQ.org.nz) if you wish to suggest changes to the content of this unit standard.