



Australian Government

Department of Education, Employment and Workplace Relations

BSBADM406A Organise business travel

Release: 1

Modification History

Not Available

INTRODUCTION

Unit Descriptor This unit covers organising domestic and overseas business trips and associated itineraries and making travel arrangements.

This unit is related to BSBADM307A Organise schedules. Consider co-assessment with BSBADM405A Organise meetings.

Competency Field Business Administration Services

Element

Performance Criteria

- | | |
|---|---|
| 1. Organise business itinerary for domestic and overseas travel | <ul style="list-style-type: none"> 1.1 Purpose of domestic and overseas travel, budgets, meeting requirements and traveller preferences are confirmed 1.2 Points of contact and names of contact persons are identified and arrangements for meetings are made and confirmed in accordance with planned itinerary 1.3 Daily itineraries are prepared with appointments, arrival and departure times, accommodation and other details in accordance with travel purpose 1.4 Documents and support material for meetings are sourced and prepared within designated timelines 1.5 Itinerary is prepared in accordance with meeting requirements, travel demands and occupational health and safety requirements for the traveller 1.6 Itinerary and meeting documents are despatched to the traveller within designated timelines |
| 2. Make travel arrangements | <ul style="list-style-type: none"> 2.1 Bookings are made in accordance with organisational policies and procedures for business travel 2.2 Travel documents are identified and arranged in accordance with itinerary and individual requirements 2.3 Travel arrangements are confirmed and confirmation documents checked and despatched to the traveller within designated timelines 2.4 Alternative arrangements are negotiated and confirmed in response to changed requirements 2.5 Travel details and itinerary are recorded in accordance |

with organisational requirements

2.6 Communication arrangements are negotiated and confirmed in accordance with organisational requirements

3. Arrange credit facilities

3.1 Methods of payment are checked and confirmed

3.2 Credit arrangements are made in accordance with organisational policy and procedures

RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

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

Travel demands may include:

- mode of travel
- class of travel
- transport timetables
- connections and transfers
- time differences
- budget
- available accommodation
- class of accommodation
- time management

Other itinerary details may include:

- Daily itinerary details may involve:
 - transport arrangements
 - arrangements for meals
 - required documentation for each appointment
 - contact names and numbers of all personnel involved
 - suggested leisure activities

Material for meetings may include:

- overhead transparencies
- electronic presentations
- promotional brochures
- product samples
- catalogues
- work completed for the client
- product prototypes/samples
- business proposals

- tenders
- reports
- contracts
- meeting papers
- presentation kits
- office supplies
- information technology (eg laptop, computer software)
- telecommunication equipment (eg mobile phone, teleconferencing equipment)

Traveller occupational health and safety may include:

- time between appointments
- limit on total appointments in any one day
- travelling time to reach venues
- time for connections and transfers
- limit on total amount of travel per day
- rest periods
- lunch breaks
- leisure time

Bookings may include:

- on line
- telephone
- travel agent

Travel documents may include:

- passport
- visa/s
- insurance
- health / medical documents
- travel itinerary
- timetables
- maps
- accommodation guides
- travel vouchers
- business schedule
- meeting agenda and other documents
- list of contacts

Confirmation documents may include:

- e-ticket
- paper ticket/s
- travel vouchers

- electronic or printed air-line itinerary
 - accommodation confirmation email, facsimile or letter
 - travel agent itinerary
- Recording travel details may include:
- separate file for each business trip
 - individual travel file for each key aspect of the trip
 - using a prepared checklist
 - using the organisation's standard checklist
 - using a diary
- Communication arrangements may include:
- points of contact
 - mobile access
 - email and facsimile access
- Methods of payment may include:
- accounts established with the organisation
 - purchase order
 - company credit cards
 - traveller pays and is reimbursed at a later date
 - the organisation provides the traveller with a cash advance
 - special arrangement made between the organisation and individual suppliers
- Credit arrangements may include:
- cab charge
 - debit / credit cards
 - currency
 - traveller's cheques
 - electronic transfer

EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

- Integrated demonstration of all elements of competency and their performance criteria
- Arrangements meet the requirements and preferences of the traveller and the organisation

Underpinning Knowledge

* At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.

- 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
- Policies and procedures regarding travel
- Internet / web sites
- Itinerary formatting and preparation
- Filing systems
- Checklist systems
- Booking procedures
- Sources of relevant documents and support material

Underpinning Skills

- Literacy skills to read a variety of texts, eg policy and procedures, travel timetables, conference brochures; write clear and detailed instructions in logical sequence
- Research skills to locate specific information regarding appropriate transport, meeting venues, accommodation, contacts etc; analyse and summarise data to produce schedule/itinerary/report
- Communication skills to participate effectively in spoken interactions; listen to detailed oral instructions; question to clarify and evaluate information; offer opinion on information gathered from a variety of sources
- Time management skills to allow sufficient time to prepare business and travel documentation
- Problem-solving skills to choose appropriate solution from a range of available solutions
- Numeracy skills for estimating time and planning; interprets, comparing and calculating with money
- Technology skills to access the Internet and make on-line bookings

- Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- Resource Implications
- The learner and trainer should have access to appropriate documentation and resources normally used in the workplace which may include:
 - policies and procedures regarding travel
 - timetables and forms
 - reference material, such as accommodation and transport suppliers
 - calendar
 - appointment books, diaries and other recording systems
 - preferred suppliers and contact details
 - maps
 - credit facilities
- Consistency of Performance
- 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
- Context/s of Assessment
- 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
 - 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

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.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1

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

1. Perform 2. Administer 3. Design

- Collecting, analysing and organising information – to identify travel requirements
- Communicating ideas and information – to negotiate meeting times and travel arrangements
- Planning and organising activities – to arrange meetings and itineraries
- Working with teams and others – to coordinate arrangements
- Using mathematical ideas and techniques – for timetable planning and time management
- Solving problems – to find alternative solutions for changed requirements
- Using technology – to make on-line bookings and record travel arrangements

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies