



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **BSBADM406B Organise business travel**

**Revision Number: 1**

## BSBADM406B Organise business travel

### Modification History

Not applicable.

### Unit Descriptor

<b>Unit descriptor</b>	<p>This unit describes the performance outcomes, skills and knowledge required to organise domestic and overseas business travel, including developing associated itineraries, booking travel and accommodation, preparing travel related documentation and making travel arrangements.</p> <p>No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.</p>
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### Application of the Unit

<b>Application of the unit</b>	<p>This unit applies to individuals employed in a range of work environments who are responsible for the organisation of business travel. They may work as individuals providing administrative support within an enterprise, or have responsibility for these tasks in relation to their own workgroup or role.</p>
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### Licensing/Regulatory Information

Not applicable.

### Pre-Requisites

<b>Prerequisite units</b>		

## Employability Skills Information

<b>Employability skills</b>	This unit contains employability skills.
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## Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
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## Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Organise business itinerary for domestic and overseas travel	<p>1.1. Confirm <b><i>purpose and requirements</i></b> of domestic and overseas travel including planned itinerary, budget, meeting requirements and traveller preferences</p> <p>1.2. Identify points of contact and names of contact persons, and make and confirm arrangements for meetings in accordance with planned itinerary</p> <p>1.3. Prepare daily itineraries with appointments, arrival and departure times, accommodation and <b><i>other itinerary details</i></b> in accordance with travel purpose</p> <p>1.4. Source, prepare and provide documents and support <b><i>material for meetings</i></b> within designated time lines</p> <p>1.5. Prepare itinerary in accordance with meeting requirements and <b><i>traveller's occupational health and safety (OHS) requirements</i></b></p> <p>1.6. Provide itinerary and meeting documents to the traveller within designated time lines</p>
2. Make travel arrangements	<p>2.1. Make <b><i>bookings</i></b> in accordance with organisational policies and procedures for business travel</p> <p>2.2. Identify and arrange <b><i>travel documents</i></b> in accordance with itinerary and individual requirements</p> <p>2.3. Confirm and check travel arrangements and despatch confirmation documents to the traveller within designated time lines</p> <p>2.4. Negotiate and confirm alternative arrangements in response to changed requirements</p> <p>2.5. <b><i>Record travel details</i></b> and itinerary in accordance with organisational requirements</p> <p>2.6. Negotiate and confirm <b><i>communication arrangements</i></b> in accordance with organisational requirements</p>
3. Arrange credit facilities	<p>3.1. Check and confirm <b><i>methods of payment</i></b></p> <p>3.2. Make <b><i>credit arrangements</i></b> in accordance with organisational policy and procedures</p>

## Required Skills and Knowledge

### REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

#### Required skills

- communication skills to organise and confirm travel arrangements with relevant parties
- literacy skills to read a variety of texts and to write clear and detailed instructions in a logical sequence
- planning and organising skills to allow sufficient time to prepare business and travel documentation and to schedule trip according to requirements
- problem-solving skills to select and obtain the most effective travel itinerary
- research skills to locate specific information such as appropriate transport, meeting venues, accommodation, contacts
- technology skills to access online travel and booking resources.

#### Required knowledge

- booking procedures
- communication techniques to relate to people from diverse backgrounds and people with diverse abilities
- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - OHS
- organisational policies and procedures regarding travel, internet sites and other online resources
- sources of relevant documents and support material.

## Evidence Guide

<b>EVIDENCE GUIDE</b>	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
<b>Overview of assessment</b>	
<b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b>	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> <li>organising business-related travel for others, including scheduling and developing itineraries and travel-related documents</li> <li>efficiently booking and organising travel within budgets and time constraints to meet traveller and organisation needs.</li> </ul>
<b>Context of and specific resources for assessment</b>	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> <li>access to: <ul style="list-style-type: none"> <li>office equipment including telecommunications equipment</li> <li>travel-related reference material, such as accommodation and transport suppliers</li> <li>appointment books, scheduling software, diaries and other recording and scheduling systems</li> <li>preferred suppliers, contact details, websites</li> <li>maps.</li> </ul> </li> </ul>
<b>Method of assessment</b>	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> <li>direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate</li> <li>review of authenticated documents from the workplace or training environment</li> <li>demonstration of techniques.</li> </ul>
<b>Guidance information for assessment</b>	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> <li>other general administration units.</li> </ul>

## Range Statement

### RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

<p><b><i>Purpose and requirements</i></b> may include considering:</p>	<ul style="list-style-type: none"> <li>• available accommodation</li> <li>• budget</li> <li>• class of accommodation</li> <li>• class of travel</li> <li>• connections and transfers</li> <li>• mode of travel</li> <li>• time differences</li> <li>• time management</li> <li>• transport timetables</li> </ul>
<p><b><i>Other itinerary details</i></b> may include:</p>	<ul style="list-style-type: none"> <li>• arrangements for meals</li> <li>• contact names and numbers of all personnel involved</li> <li>• required documentation for each appointment</li> <li>• suggested leisure activities</li> <li>• transport arrangements</li> <li>• local money details and accessibility of banks and automatic teller machines (ATMs) where applicable</li> </ul>
<p><b><i>Material for meetings</i></b> may include:</p>	<ul style="list-style-type: none"> <li>• business proposals</li> <li>• catalogues</li> <li>• contracts</li> <li>• electronic presentations</li> <li>• information technology (e.g. laptop, computer software)</li> <li>• meeting papers</li> <li>• office supplies</li> <li>• overhead transparencies</li> <li>• presentation kits</li> <li>• prior work completed for the client</li> <li>• product prototypes or samples</li> <li>• product samples</li> <li>• promotional brochures</li> <li>• reports</li> </ul>

<b>RANGE STATEMENT</b>	
	<ul style="list-style-type: none"> <li>• telecommunications equipment (e.g. mobile phone, teleconferencing equipment)</li> <li>• tenders</li> </ul>
<b><i>Traveller's occupational health and safety (OHS) requirements</i></b> may include:	<ul style="list-style-type: none"> <li>• leisure time</li> <li>• limit on total amount of travel per day</li> <li>• limit on total appointments in any one day</li> <li>• lunch breaks</li> <li>• rest periods</li> <li>• time between appointments</li> <li>• time for connections and transfers</li> <li>• travelling time to reach venues</li> </ul>
<b><i>Bookings</i></b> may include:	<ul style="list-style-type: none"> <li>• online</li> <li>• telephone</li> <li>• travel agent</li> </ul>
<b><i>Travel documents</i></b> may include:	<ul style="list-style-type: none"> <li>• accommodation confirmation email, facsimile or letter</li> <li>• business schedule and contact details</li> <li>• electronic or printed airline itinerary</li> <li>• e-ticket and/or paper ticket</li> <li>• health or medical-related documentation</li> <li>• insurance details and contacts</li> <li>• list of contacts including overseas if applicable</li> <li>• maps</li> <li>• meeting agenda and other documents</li> <li>• passport</li> <li>• timetable/s</li> <li>• travel itinerary</li> <li>• travel vouchers and accommodation guides</li> <li>• visa/s</li> </ul>
<b><i>Recording travel details</i></b> may include:	<ul style="list-style-type: none"> <li>• individual travel file for each key aspect of the trip</li> <li>• making electronic copies of critical travel documents such as passport details page, airline tickets, itinerary</li> <li>• separate file for each business trip</li> <li>• using a diary</li> <li>• using a prepared checklist</li> <li>• using the organisation's standard checklist</li> </ul>
<b><i>Communication arrangements</i></b> may include:	<ul style="list-style-type: none"> <li>• email and facsimile access</li> <li>• mobile access</li> </ul>



<b>RANGE STATEMENT</b>	
	<ul style="list-style-type: none"> <li>• points of contact</li> </ul>
<b>Methods of payment</b> may include:	<ul style="list-style-type: none"> <li>• accounts established with the organisation</li> <li>• company credit cards</li> <li>• purchase order</li> <li>• special arrangement made between the organisation and individual suppliers</li> <li>• providing the traveller with a cash advance</li> <li>• reimbursing traveller for payments made on presentation of receipts</li> </ul>
<b>Credit arrangements</b> may include:	<ul style="list-style-type: none"> <li>• cab charges</li> <li>• currency</li> <li>• debit or credit cards</li> <li>• electronic funds transfer</li> <li>• petty cash</li> <li>• travellers cheques</li> </ul>

## Unit Sector(s)

<b>Unit sector</b>	
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## Competency field

<b>Competency field</b>	Administration - General Administration
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## Co-requisite units

<b>Co-requisite units</b>		