

## S321: Organise business travel or accommodation

**Overview:** Research, organise and agree arrangements for travel and accommodation to make sure they meet the brief and agreed budget.

**Links:** Events and Meetings; Communications

**Specific skills:**

- Communicating
- Checking
- Decision-making
- Evaluating
- Managing time
- Negotiating
- Organising
- Planning
- Problem-solving
- Researching

### Performance Indicators

1. Confirm travel or accommodation and budget requirements
2. Check draft itinerary and schedule with the traveller
3. Research and book travel arrangements or accommodation as agreed, obtaining best value for money
4. Obtain foreign currency, relevant insurance and visas, if required
5. Obtain and collate documents and information for travel or accommodation
6. Maintain records of travel or accommodation and store any confidential information securely, including financial records
7. Arrange payment facilities for travel or accommodation
8. Follow the correct procedures when there are problems with travel or accommodation arrangements
9. Provide the traveller with an itinerary, documents and information in good time
10. Confirm with the traveller that itinerary, documents and information meet requirements
11. Evaluate and maintain a record of external services used

### Knowledge & Understanding

- A. The purpose of confirming the brief and budget for travel or accommodation
- B. How to organise business travel or accommodation to meet expectations
- C. The main types of travel or accommodation arrangements that may need to be made and the procedures to follow
- D. The sources of information and facilities that are used to make travel or accommodation arrangements
- E. How to obtain best value for money when making travel or accommodation arrangements
- F. How to obtain foreign currency, insurance and visas and when these are required
- G. How to keep records of travel or accommodation arrangements, including financial records
- H. The types of information that are confidential and how to store them in line with current legislation
- I. The documents and information to provide to the person who is travelling and how to obtain these
- J. The procedures to follow to make payment arrangements for travel or accommodation
- K. The types of problems that may occur with travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems
- L. The purpose of evaluating the travel or accommodation used and recording the findings of the evaluation for future application