



## WA7 Business Travel, Diary Systems, Meeting Organization and Event Management

### *2.13 Recommend business travel and accommodation arrangements and prepare relevant documentation*

Demonstrate the ability to recommend business travel and accommodation arrangements in accordance with a deadline and in line with budget requirements and organisational procedures **(LO021)**.

Demonstrate the ability to produce and collate travel documentation within an appropriate timescale in order to meet traveller's needs and legal requirements (e.g. visa procedures) **(LO022)**.

Demonstrate the ability to state the importance of checking travel plans immediately prior to the journey and carry out the process in a clear and effective way **(LO023)**.



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<b>Work Area Code:</b>	7
<b>Work area title:</b>	Business Travel, Diary Systems, Meeting Organization and Event Management
<b>Unit Code:</b>	2.13
<b>Unit Title:</b>	Recommend business travel and accommodation arrangements and prepare relevant documentation
<b>Learning Outcomes Ids:</b>	LO021, LO022 and LO023
<b>Learning Outcomes titles:</b>	<ul style="list-style-type: none"><li>•Demonstrate the ability to recommend business travel and accommodation arrangements in accordance with a deadline and in line with budget requirements and organisational procedures.</li><li>•Demonstrate the ability to produce and collate travel documentation within an appropriate timescale in order to meet traveller's needs and legal requirements (e.g. visa procedures).</li><li>•Demonstrate the ability to state the importance of checking travel plans immediately prior to the journey and carry out the process in a clear and effective way.</li></ul>
<b>Recommended Duration:</b>	3 hours
<b>Trainer:</b>	



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# Why it is important

- Because in today's business environment companies routinely buy and sell products and services around the world.
  - Business related travel is common.



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# The role of a personal assistant

- To get your boss to his or her destination and back home again as smoothly as possible.



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# The role of a personal assistant

- The role of the personal assistant includes:
  - To recommend arrangements.
  - To finalise arrangements upon confirmation.
  - To produce documentation.
  - To assist/cope with last minute changes.



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# Let's start with the basics

- What is the purpose of the trip?
- What are the desired departure and return times and dates?
- What is the point-by-point itinerary?



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# Let's start with the basics

- Will the boss be travelling alone?
- What type of transportation does he /she desire?



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# How do we travel?

- By plane
- By bus
- By car
- By train
- By ship
- By metro/underground
- By taxi



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# Reasons for traveling

- We travel for:

1. Pleasure/ Vacations
2. Business
3. Personal reasons: health, learning, expanding your perspective, building and strengthening relationships...



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- Recommend travelling arrangements and proceed with the booking of:
  - Air tickets
  - Bus or train
  - Car rental



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- Find potential sources of information:
  - Internet
  - Travel Agent
  - Other sources



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- Popular sources:
  - [www.airtickets.gr](http://www.airtickets.gr)
  - [skyscanner.com](http://skyscanner.com)
  - [www.kayak.com](http://www.kayak.com)
  - [www.booking.com](http://www.booking.com)
  - [www.tripadvisor.com](http://www.tripadvisor.com)
- Also airline web sites
- Online forums
- Blogs and independent sites



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- Travel apps
- Printed guidebooks
- Advice from locals
- ...



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- **Electronic ticket:**

- Allows us to travel without a paper ticket.
  - It should always have a ticket number.
- Train ticket
  - Usually you can a print timetable through the internet. In most cases you can also purchase the ticket online.
- Car Rental
  - You need to state the car pick-up time, drop-off time, as well as the type of car you need.



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# Type of transportation decision

- Our decision will depend on :
  - The budget
  - The available time
  - Our manager's personal preferences



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# Take into account all key factors

- Requested time of arrival/  
Requested time of departure
- Suitability of the flight taking into account other subsequent transportation.
  - E.g. if one arrives very late at night there may not be transportation to take him/her to another village or a city.



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# Different types of accommodation

- **Guest House:**

- Often these are small business units with availability of breakfast and dinner. Usually, they do not offer business facilities.

- **Small local hotels:**

- Usually privately owned
- 6-20 rooms
- Usually they offer breakfast and other meals.
- You need to check for business facilities.



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# Different types of accommodation

- **International chain hotels:**

- Big hotel units (owned by big enterprises).
- High level of infrastructure some times including swimming pool, business centre, gym and spa etc.



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# Different types of accommodation

- **Bed and breakfast**
  - Some sort of breakfast is included (from a drink or coffee to a full breakfast).
- **Self-catering accommodation**
- **Camping and caravan sites**
- **Farmhouses**
- **Motels**
- **Youth hostels**
- ...



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# Key questions to identify requirements

- **Location:**
  - Near the meeting venue, metro station or city centre.
- **Level of luxury:**
  - 4 star or 5 star
- **Availability of business centre/ Spa/ Gym**



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# Key questions to identify requirements

- Internet connection in the room.
- Tea and coffee making facilities in the room.
- Other: facilities for children, admission of pets, plurilingual staff,...



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# Our decision on accommodation

- You can recommend but you will not decide. Always get your manager to confirm.



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# Our decision on accommodation

- Manager decision depending on:

- Requirements
- Budget
- Time
- Preferences
- Availability



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# Our decision on accommodation

- Always check the hotel website. It gives you an indication of the hotel's quality.
- Always check for references (trip advisor, booking.com, etc).



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# Our decision on accommodation

- Always check the accommodation availability first.
- Compare among different but similar options before taking a decision, through, e.g., hotel search engines.

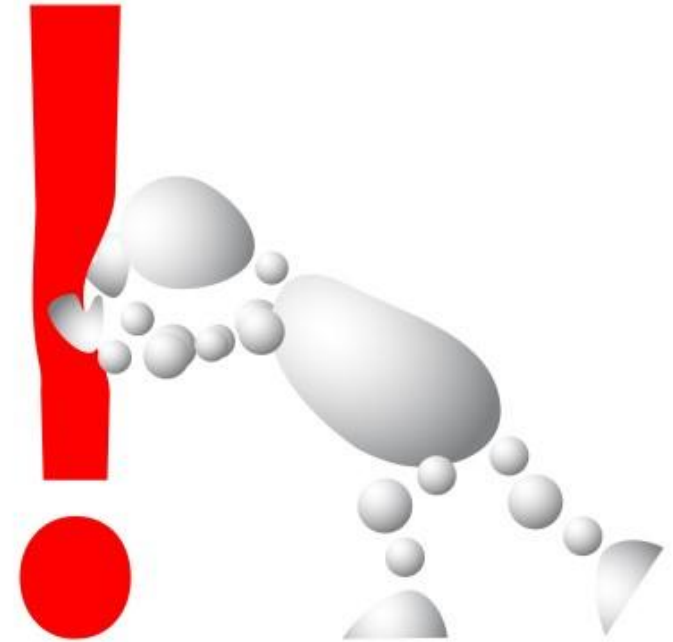


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- Ensure that the name you give upon booking is identical to the name on the identity card or passport.

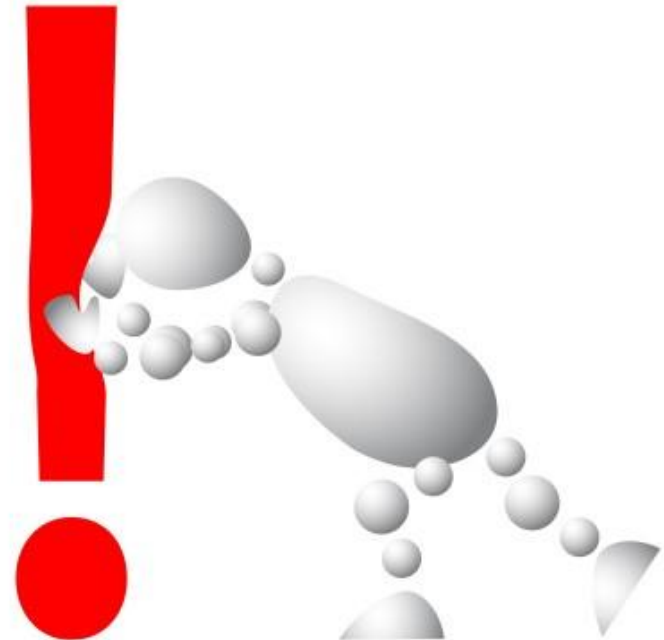


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- Double check the day of arrival and departure:
  - Especially if arrival and departure is after midnight (AM and PM is sometimes confusing).



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- The following documentation is vital for the traveler:
  - For travelling:
    - Electronic or other ticket
    - Hotel address and contact details
    - Hotel confirmation
    - Copy of the receipt in case the hotel has been prepaid.
    - Other travelling documents such as train ticket confirmation, taxi order etc.



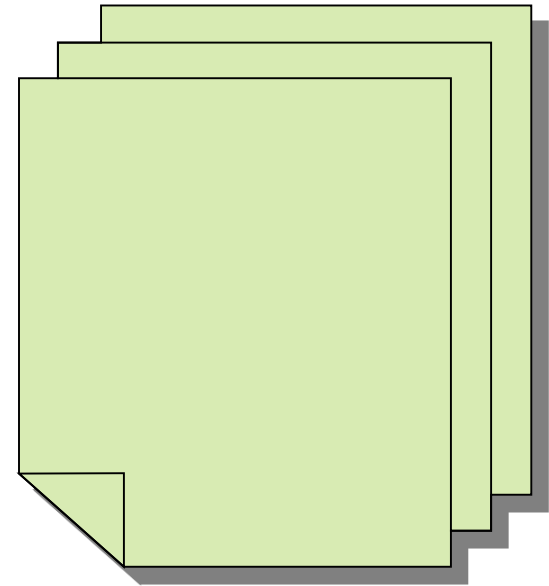
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- The following documentation is vital for the traveler:
  - For the meetings or events
    - Location of the meeting or event (address, etc).
    - Agenda of the event
    - Business cards
    - Any presentation (in case your manager has to present something).



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# Collate all the necessary documents

- **Business cards:**
  - For networking purposes
- **Passport/ ID:**
  - Be aware that both Passport and ID should be valid (not expired, no photocopies), otherwise you should take all necessary actions to have them ready on time.
- **Health papers:**
  - In case of required vaccinations, etc.



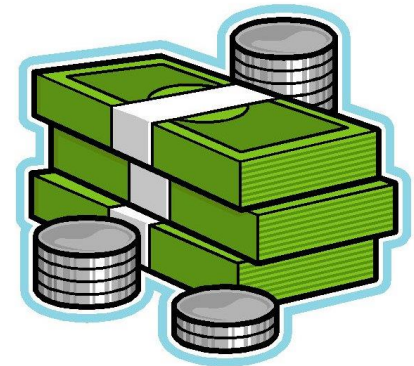
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# Collate all the necessary documents

- Both some Cash and credit card:
  - Be aware of the currency used in the destination country.
  - In case of an emergency it is always good to have a credit card with you.
- Prepare all necessary business documents:
  - Meeting agendas, etc.



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# Collate all the necessary documents

- **Travel documents:**

- Electronic ticket
- Hotel reservation and confirmation
- Hotel address and contact details (Google maps)
- Any train/bus tickets
- Necessary timetables
- Trip itinerary



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- **Also:**

- *It is important that the name on the reservation be the same with the name stated on the passport or other official citizenship document. If a name has changed since the document was issued (i.e. marriage /divorce), it is required that the document be updated with the new name, or to provide official supporting document(s) of the name change. Otherwise, it may result in delay or possible denial of boarding.*



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- **Furthermore:**

- *Be aware of possible strikes when you visit another city/country and ensure that required means of transportation is available.*
- *Watch the weather broadcast, in case is bad and might be a cancelation or a possible delay in your travel.*
- *Have always an alternative contingency plan about issues such as trip itineraries.*



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# Recommend Business travel and Accommodation

- Scenario 1:

*Your Manager bursts in one morning and tells you:*

*"Maria I have to travel to Paris as soon as possible for a very urgent meeting. Could you arrange this please? Please keep the budget as low as possible."*



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# Recommend business travel and accommodation

What should you do?



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# Critical information needed

## 1. First of all get as much information as you can:

1. Remember that it is your responsibility to get the information you need. Your manager may put the blame on you if you do not ask about something.
  - Mrs./ Mr. Thomson are you planning to go alone?
  - How do you want to travel?
    - you make this question only if there are real alternatives. For example you can only fly from Cyprus to Paris.
  - Any special requests regarding flight meals?
  - Would you like to add your miles on your bonus card?
  - When will you return?



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# Critical Information needed

- Any specific hotel in mind?
- What are the hotel requirements?
  - Internet connection
  - Business center
  - Gym /spa
- Will you have time for tourism?  
Shall I provide you with suggestions?



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# Business travel and accommodation

- Call your travel agent or search the internet to book transportation and accommodation:
  - Compare the prices
  - In both cases, copies of itinerary, hotel, airplane, train confirmation should be kept.
  - Do not forget to print also timetables for trains/buses, etc.



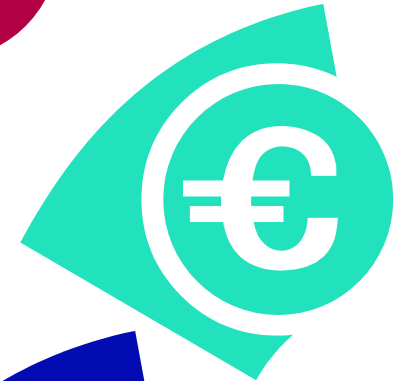
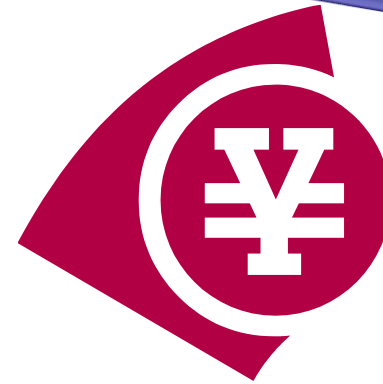
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# Business travel and accommodation

- Check the validity of the travel documents:
  - Visa, Passport, ID Card
  - Ensure that the name provided matches the one on the official documents.
- Check the currency:
  - Ensure that the employee has currency.



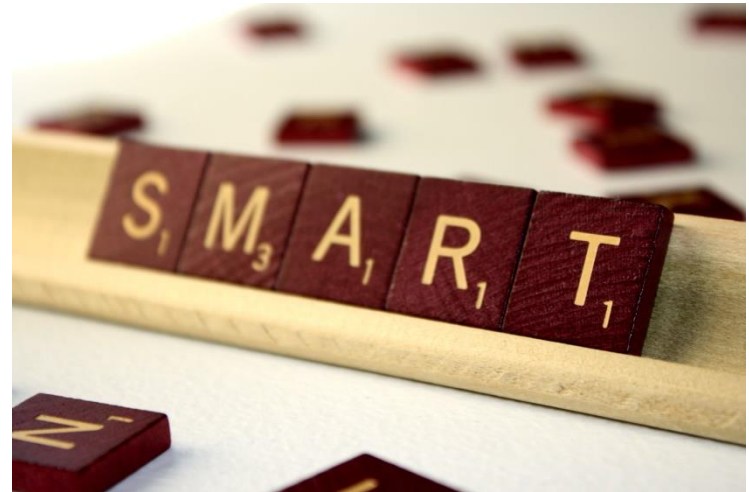
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# Business travel and accommodation

- Organize smart, be proactive. Identify possible risk factors and techniques for their elimination.
  - E.g. Transfer between two or more different flights. If there is not sufficient time between them you may miss your flight.



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# Business travel and accommodation

- If your Manager travels for a meeting/event take into account:
  - The time the meeting/ event starts.
  - The distance from the airport and hotel (identify possible transportation methods).
  - Check for any special offers (e.g. stay 3 nights and pay for 2,etc).
- Provide all necessary documentation.



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# Business Travel & Accommodation Information

- Your budget for this business travel should be approximately:
  - 1000 Euros
- Your boss will travel alone:
  - 1 ticket and 1 single room
- Wants to stay in the Demmarchalie hotel:
  - For 1 night
  - Costs 150 Euros/ night, breakfast and lunch are included.



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# Business Travel & Accommodation Information

- The meeting at Paris starts at 15:00 pm:
  - The meeting will held in a place that it is close to the airport.
  - The taxi from the airport to the meeting costs 20 Euros/route.
  - The bus from the airport costs 2 Euros and there is a bus station near the meeting point.



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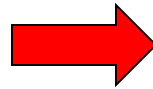
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# Business Travel air ticket

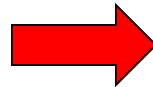
The air ticket costs: 210,40 Euros  
(Direct flight)

From:  
**Athens**  
**07:50am**



To:  
**Paris**  
**11:50am**

From:  
(the next day of the  
meeting)  
**Paris**  
**10:50am**



To:  
(the next day of the  
meeting)  
**Athens**  
**14:50am**



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# Business Travel air ticket

From:  
**Athens**  
**07:50am**

To:  
**Paris**  
**12:50 pm**

Transfer:  
**Rome**  
**10:50 pm**

With an 1 hour **transfer** to Rome the  
air ticket costs: 180,40 Euros



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# Your organized Travel & Accommodation spreadsheet

Travel & Accommodation Budget for Paris	300 euro's
Air ticket (Direct flight)	210,40 euro's
Air ticket (Transfer from Rome)	180,40 euro's
Hotel Accommodation/night	150 euro's/night
Food	Provided by the host
Taxi/ route	20 euro's/route
Public transportation	2 euro's/route



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- **A written travel agenda:**
  - Useful for both for the executive and the administrative assistants.
    - It may be the case that the executive has forgotten the address or time for an appointment or perhaps the administrative assistant faced a sudden emergency and needs to know exactly where the employer can be contacted.
    - Before finalising it, confirm with the executive.



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# Example of an itinerary

- Mary Thomson Itinerary for London business show.
- THURSDAY 27 May 2011:
  - 08:00 AM Leave from home with taxi to Larnaca airport
    - Taxi number: 99474646
  - 11:00 AM Depart for London with British Airways BA868
  - 16:00 PM Arrive to London
    - Taxi will be there to collect and take you to the NAYA hotel (reservation attached).
  - 20:00 Dinner with Mr. Patsy, sales director COPDE
    - He will pick you up from your hotel (Mr Patsy mobile is 0044-33-448488).
- FRIDAY 28 MAY 2011
  - ETC ETC ETC



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# Use checklists to help you with the organisation of trips

☐ Book tickets using frequent flyer number:

☐ Ticket number is \_\_\_\_\_

☐ Book other transportation:

Transportation type	Purpose of transportation	Documents attached
---------------------	---------------------------	--------------------

☐ Arrange for currency if needed:

☐ Amount of currency given to the traveller.



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# Use checklists to help you with the organisation of trips

## ☐ Check documents:

- ☐ Passport
- ☐ Visa
- ☐ Driver Licence

## ☐ Prepare Itinerary:

- ☐ Itinerary attached



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# Use checklists to help you with the organisation of trips

☐ Prepare list of destination contact names, addresses and phone numbers:

☐ List attached

☐ Enclose meeting agendas:

☐ Meeting agendas attached for the following meetings

1. \_\_\_\_\_



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# Use checklists to help you with the organisation of trips

## ☐ Speeches, reports and presentations:

☐ The following are attached

1. \_\_\_\_\_

## ☐ Other attachments:

☐ Weather forecast

☐ Suggested restaurants



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❑ Checklists are very important as is checking travel plans prior to the journey, as:

- ❑ It allows us double – check for spelling errors, especially in names, birth dates, id or passport numbers, etc.
- ❑ It allows us make sure that we have enough time for catching the train or bus or plane
- ❑ We want to be sure that we have all required documents (tickets, boarding pass, id cards or passports) with us



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- ❑ During planning, make sure you have checked that you fulfill the requirements for travelling in the destination
  - ❑ Are there Visa requirements?
  - ❑ In case you are travelling with a minor, there are different requirements in each country
  - ❑ Check the goods you are allowed to carry with you
  - ❑ Other special regulations (e.g. military service)



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# The payments during a business trip

- There are many payments before, during and after a business trip:
  - The trip itself
  - The accommodation
  - The meals
  - Other expenses: petrol(hire a car), taking a taxi from the hotel to the airport, etc.



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- After the trip, make sure:
  - You have copies of all travel documents (tickets, boarding passes, etc.)
  - You have copies of receipts (were needed)
  - You have an invoice from the accommodation facility
- **FILE ALL THESE DOCUMENTS APPROPRIATELY!**



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- You work for a multinational company in Cyprus. The HQ of your company is in the U.S.A. The CEO of the Company, Mrs Hollborn will come along with her family to Cyprus for 5 days (Thu.-Mon.) to spent some time and supervise the company you work for.

Your Manager has assigned to you the task of organising their accommodation in Cyprus, as well as their daily program.

Describe exactly what you'll do.



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## Actions for travel arrangements

Details of the person who travels:

Departure Day:

Return day:

Places to visit:

Which airlines he/she prefers:

1. Choice..... 2. Choice.....

Window seat/ alley seat:

Special diet :

Position in the company:

Car rental details or pick up details:

1. Choice..... 2. Choice.....

Car type:

Hotel preferences:

1. Choice..... 2. Choice.....

Room type (Double /single/suite):

Web needed:



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# Methodological tool

EUPANEXT\_LO21\_M01

Recommend and Itinerary



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# Methodological tool

EUPANEXT\_LO22\_M01

Prepare the itinerary



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# Methodological tool



EUPANEXT\_LO23\_M01

Eliminate the risks involved in travelling



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- Describe the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow.
- Find potential sources of information.
- Describe how to keep records of business travel or accommodation arrangements.
- Name possible risk factors and techniques for their elimination
- Explain possible ways one can use to identify legal requirements for travelling
- Outline travel documentation and information to provide to the person who is travelling, and how to obtain these.
- List the steps to follow in order to produce and collate travel documentation within an appropriate timescale in order to meet traveller's needs and legal requirements
- Outline the importance of checking travel plans immediately prior to the journey and carry out the process in a clear and effective way.



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- Business related travel is common.
- Recommend travelling arrangements and proceed with the booking of:
  - Air tickets
  - Bus or train
  - Car rental
- After the trip, make sure:
  - You have copies of all travel documents (tickets, boarding passes, etc.)
  - You have copies of receipts (were needed)
  - You have an invoice from the accommodation facility



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# Well Done!

## You have completed this unit



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