

Leisure and Tourism

Unit 2 - Marketing in Leisure and Tourism

Unit 3 - Customer Services in Leisure and Tourism

Student Assessment Activities - Teacher Notes

advancing learning, changing lives

Professional Development and Training



Assessment Activities

Introduction

These assessment activities have been written by a team of subject specific people including teachers and moderators. They are examples of the type of activities you might want to consider using with your students.

They give a basic format that you might want to follow for your assessment activities. If you use this format remember **it is your responsibility to check that the work the students produce meets the requirements of the specification.**

Before you use these **assessment** materials remember that there are various preliminary stages to pass through -

Teaching - remember the 'What you need to learn' section of the specification - make sure you have read the specification and have fully addressed the detail of the unit. Teach the knowledge that is required.

Learning - students need to engage in activities that reinforce learning. This may be through group work, discussion, role plays, problem solving activities, worksheets, interviews, investigations or visits to real organisations.

Assessment - once the teaching and learning aspects are complete and you are confident that the student has gained the appropriate knowledge you will want to give them an assessment activity. The work that is then produced becomes the evidence for their portfolios.

Teaching and Learning

Skills the students need to learn

- Ensure the pupils know the vocabulary of the specification - you may want to put key words on display somewhere, or use the development of understanding of key words as an activity; encourage them to use correct vocabulary from the start.
- Students will need help to differentiate between a description and an evaluation - the relevant words in the mark bands.
- Students will need practice at applying the concepts and vocabulary in real contexts - have activities that replicate the world of work.
- Ensure the skills developed relate to the standard required by industry. In Engineering for example students must be able to produce engineering drawings that comply with sector specific standards and conventions

Links/External needs/Resources

- Industry links could be used to provide useful resources and give the students opportunities to experience different types of organisations/products relevant to the course - visits, case studies, speakers, sample documentation
- Check out the resources and other advice in the Teachers Guide

Delivery

- These are vocational courses - avoid making it too theoretical.
- When planning the course build in the vocational relevance
- When delivering the course make the most of links with industry/commerce
- Make the classroom an 'adult learning environment'

Assessment

- Check assessment activities to make sure they allow the student to
 - demonstrate learning and work independently where possible so as to access the higher mark bands
 - produce the right evidence across the mark bands
- Make sure the students have access to the most appropriate resource in order to get the unit evidence right, here are a few examples of the things you need to remember but it is important that you check the unit specifications carefully:
 - Applied Art & Design - check the specifications carefully if you are integrating the delivery
 - Applied Business - make sure they have chosen the right organisation
 - Applied ICT - they have chosen the right business organisation to investigate
 - Applied Science - make sure they cover all the topics in Unit 1 'What you need to learn' and that it is relevant to the content
 - Engineering - they have a client brief and a product specification to include a set of drawings
 - Health & Social Care - they have chosen two different clients with an appropriate range of needs who use the services of their chosen organisation
 - Leisure & Tourism - they need practice in customer service situations
 - Manufacturing - they have the right client Brief and Production Plan including a product specification
- **Check the specification carefully to ensure that you have covered the key points like the things noted above**
- Ensure students work is internally moderated
- Attend Getting the Standards Right events to help with marking

Assessment Activities in this pack

These follow closely the structure of the assessment evidence grid and give suggested activities the students might do in each of the mark bands.

The Front Page

This clearly identifies the 'Title of the Assessment Activity', Subject, Unit Number and Title. The subject and unit number are then given in the footer in case the pages get misplaced.

Get Ready This states the banner - the first line in the assessment evidence grid - which states the nature of the work the student has to produce.

Get Set This gives the context in which the work is to be done. This reinforces the nature of the GCSEs and gives a work-related context.

Go The assessment criteria are listed here - these form the basis of the assessment activities that follow.

The pages that follow take one of the criteria at a time and suggest activities in the given context for each mark band. Clearly just stating the work the students might do does not guarantee that they will do it, nor that what they produce meets the evidence requirements. It is important therefore to check the work and give feedback to the students.

Formative and Summative Feedback

Teachers giving feedback to the students as they work through the activities can motivate them to achieve their full potential. Once the work has been assessed the **mark record sheet** should be completed and put with the work. The work can then go in the **portfolio**.

Mark Record Sheets

These are given in the Teachers Guide.

Portfolio Management

- Only the evidence that meets the assessment criteria should be put in the portfolio - nothing else, no teaching notes, handouts or unnecessary materials. Where questionnaires have been used then one example with a summary should be included - not all the completed questionnaires
- Look at the sheet headed Virtual Portfolio included with these notes - it outlines a portfolio structure that you might want to follow
- Portfolios must have a front sheet clearly indicating the student name and qualification
- Each unit should have a separate section in the portfolio - with the possible exception of Applied Science and Applied Art & Design
- Annotate the work - refer again to the instructions, show the moderator where the evidence can be found and why marks have been awarded. Moderators should be able to locate the evidence quickly and easily
- Use the mark record sheets given
- Students should put page numbers on the work
- Witness statements should be detailed, what exactly has been witnessed, by whom and when
- Make sure any photographs are real evidence of an individual student's work - a photograph of a class/group without annotation is not evidence. The photograph must clearly show the specified student with the specified evidence and must be annotated/signed by the teacher
- Do not put work in plastic wallets it is preferable if each unit of work is hole punched and treasury tagged on the left hand side

Other types of evidence

Witness Statements

A witness statement should be a statement about an individual student outlining what the witness wishes to state about the student in the context of the assessment evidence criteria.

Witness statements should not be a list photocopied for each member of the class - such statements are meaningless. If lists are used anything ticked should be supported by a statement outlining what the individual student should be credited with having done or achieved.

Photographs

Photographs are only acceptable as evidence if it is clearly annotated - the performance of the individual student clearly seen. A group photograph around an object/display or such like without any annotation is not evidence. Evidence must be of what the individual student did as part of the group outcome.

Teachers' Guide and Portfolio Marking Guidance

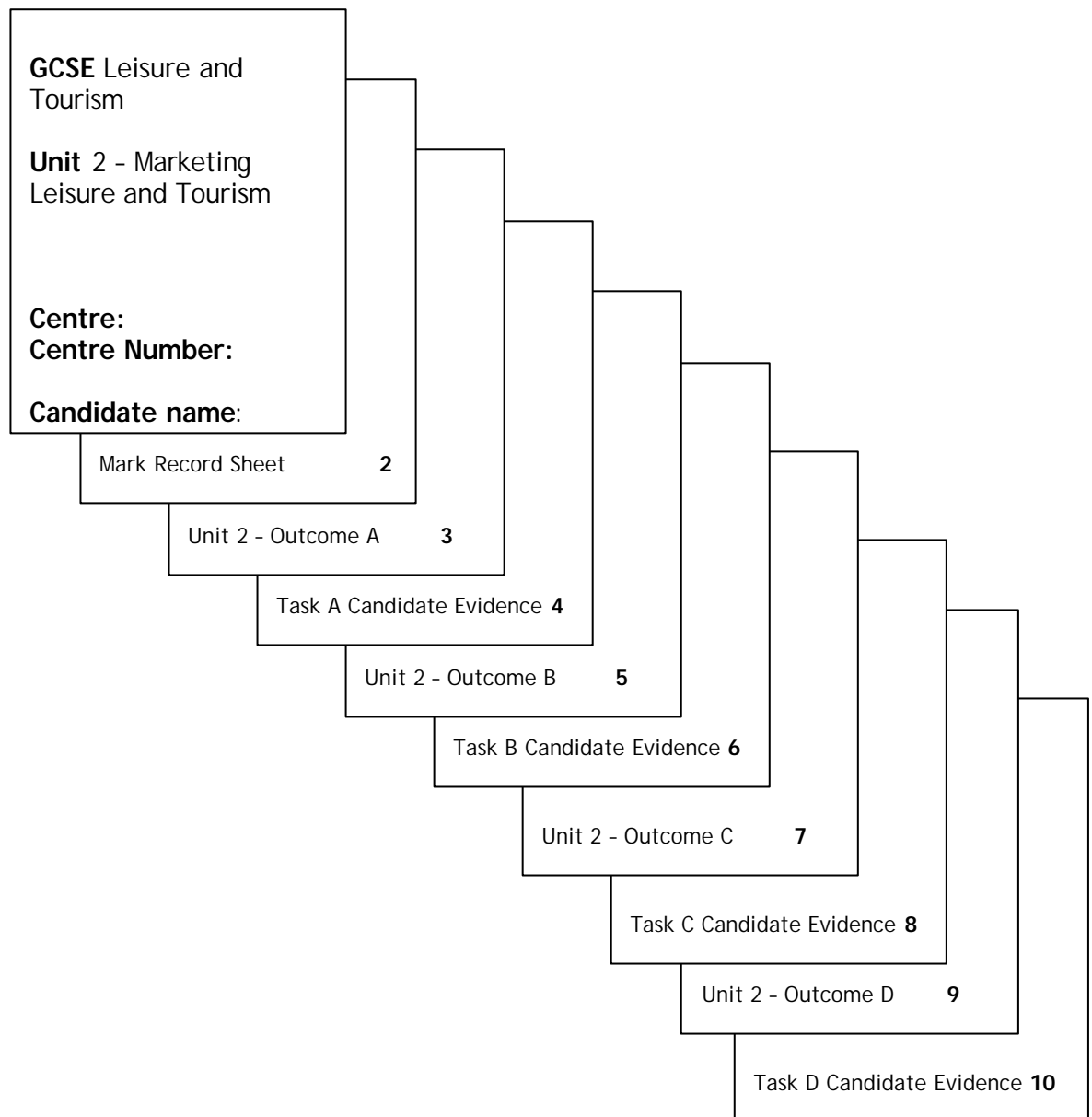
Teachers should refer to the Edexcel Teachers Guide and Portfolio Marking Guidance for further use of Witness Statements and Observation Records.

Virtual Portfolio

Example from Leisure and Tourism

Unit 2 - Marketing Leisure and Tourism

The following represents a virtual portfolio. It incorporates standard sheets to be included in the portfolio. Some of these sheets will need to have candidate information while others need teachers to provide feedback on candidate performance.





Leisure and Tourism

Unit 2 - Marketing in Leisure and Tourism




Student Assessment Activities

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Professional Development and Training



TITLE OF ASSESSMENT ACTIVITY	Working in the Marketing Department
SUBJECT	Investigation into the Marketing activities of a Leisure and Tourism Organisation
UNIT NUMBER AND TITLE	Unit 2 - Marketing in Leisure and Tourism

	GET READY:	You need to produce an investigation into the marketing activities of a leisure and tourism organisation.
	GET SET:	You work in the Marketing Department of your chosen organisation. Mandy Watson, the Marketing Manager, is preparing for a budget meeting with the Finance Manager. She is hoping to get the Finance Manager to increase the marketing budget. She has asked you to give an overview of some of your organisations marketing activities.
	GO:	You need to produce an investigation into the marketing activities of a Leisure OR Tourism organisation. Your work must: <ul style="list-style-type: none"> a) describe the 4Ps in relation to the selected organisation and show how they work together to meet the organisation's objectives b) include an item of promotional material you have produced for the organisation, designed to attract a particular target market c) assess the range of promotional techniques and materials the organisation uses, including research methods used to identify target markets d) compare one of the organisation's promotional campaigns with the promotional campaign of one other leisure and tourism organisation.



TITLE OF ASSESSMENT ACTIVITY- Working in the Marketing Department

What must be included in your portfolio:

You need to produce an investigation into the marketing activities of a leisure and tourism organisation. Your investigation must:

- a) **describe** the 4Ps in relation to the selected organisation and show how they **work together** to meet the organisation's objectives.

What you must do to gain 1 - 4 marks/mark band 1

- a basic description of the 4Ps in relation to the selected organisation; some attempt to show how they work together to meet the organisation's objectives.

Suggested task

- i) EITHER
Produce a PowerPoint presentation

OR
A poster describing your organisation's product, price, place and promotion
- ii) Choose two objectives of your organisation. For each objective complete a diagram by:
 - writing your organisation's objectives in the centre then
 - show how product, price, place and promotion meet the objectives.

Your teacher will give you two copies of the diagram to complete - one for each objective.

What you must do to gain 5 - 7 marks/mark band 2

- a sound description of the 4Ps in relation to the selected organisation; an explanation of how they work together to meet the organisation's objectives.

Suggested task

- i) EITHER
Add detail to your PowerPoint presentation so that each of the 4Ps is described
- OR
E-mail your PowerPoint presentation to the Marketing Manager. In your e-mail give more detail about each of the 4Ps
- OR
Attend an informal meeting with the Marketing Manager. Take your poster along to the meeting and talk through it to add more detail
- ii) Expand on the diagrams produced earlier to form concept maps of how the organisation's 4Ps work together to meet the organisation's objectives. The concept maps should clearly illustrate how some of the 4Ps are able to work together to meet the objectives. Make sure there is an explanation for each link between the 4Ps and the objective given.

What you must do to gain 8 - 10 marks/mark band 3

- a detailed description of the 4Ps in relation to the selected organisation; a thorough understanding of how they work together to meet the organisation's objectives.

Suggested task

- i) E-mail a detailed description of the organisations 4Ps to the Marketing Manager.
- ii) Develop a third concept map for a further objective showing how the organisations 4Ps work together to meet the objective stated. When all three concept maps are complete, produce a summary report for the Marketing Manager. In this report you need to highlight how well the 4Ps are working together to meet the three objectives.

Formative Feedback:

- on description of 4Ps

- on explanation of how 4Ps work together to meet organisations objectives

Signature:

Date:



TITLE OF ASSESSMENT ACTIVITY - Working in the Marketing Department

What must be included in your portfolio:

You need to produce an investigation into the marketing activities of a leisure and tourism organisation. Your investigation must:

- b) include an item of promotional material you have produced for the organisation **designed to attract a particular target market.**

What you must do to gain 1-6 marks/mark band 1

- a simple design for the item of promotional material that includes basic information about the organisation but not clearly targeted at a particular market.

Suggested task

Think about an event or product your organisation wants to promote. Design an item of promotional material for that product or event.

What you must do to gain 7-10 marks/mark band 2

- an effective and imaginative design for the item of promotional material that includes all necessary information for an identified target market.

Suggested task

- i) Select a target market for your organisation (choose either a specific age group or life cycle stage). Think about an event or product your organisation wants to promote that your chosen target market would be interested in.
- ii) Design an imaginative item of promotional material. Make sure it is effective in providing information and attracting attention. Think about the target market you have chosen when planning your design.

What you must do to gain 11-14 marks/mark band 3

- a well-structured, innovative and creative item of promotional material that shows an in-depth understanding of target marketing.

Suggested task

- i) Select a target market for your organisation (choose either a specific age group or life cycle stage). Think about an event or product your organisation wants to promote that your target market would be interested in.
- ii) Design an innovative item of promotional material. Innovative means new or original. Think about the layout and structure to make sure it is effective. Make sure your promotional material links clearly to your chosen target market in images, content, language etc.

Formative Feedback

- on creativity and innovation in design of material

- on effectiveness of material

- on link to target material

Signature:

Date:



TITLE OF ASSESSMENT ACTIVITY - Working in the Marketing Department

What must be included in your portfolio:

You need to produce an investigation into the marketing activities of a leisure and tourism organisation. Your investigation must:

- c) **assess** the range of promotional techniques **and** materials the organisation uses, **including** research methods used to **identify target markets**.

What you must do to gain 1-5 marks/mark band 1

- a description with some assessment of the main promotional techniques and materials the organisation uses and of the research methods used to identify target markets.

Suggested task

EITHER

The Marketing Department are having a meeting that you should attend. Your teacher will give you a copy of the agenda. You should make sure you participate in all parts of the meeting.

OR

- respond to the e-mail 'Promotional Techniques'. Your teacher will give you a copy of the e-mail.
- collect four samples of your organisations promotional materials. Stick each sample of promotional material on a separate large sheet of blank paper. Point out the good and bad points of each material
- respond to the e-mail 'Market Research'. Your teacher will give you a copy of the e-mail.

What you must do to gain 6-9 marks/mark band 2

- an assessment of the main promotional techniques and materials the organisation uses and of the research methods used to identify target markets.

Suggested task

EITHER

Your teacher will give you an agenda for a Marketing Department staff meeting. You should make sure you participate in all parts of the meeting. You should make notes to take to the meeting with you.

OR

- respond to the e-mail 'Assess Promotional Techniques'. Your teacher will give you a copy of the e-mail.
- collect six samples of your organisations promotional materials. They should be different types of materials ie not all leaflets or posters. Assess each sample of promotional materials using the AIDA technique
- respond to the e-mail 'Market Research'. Your teacher will give you a copy of the e-mail.

OR

Collect samples of market research methods used by the organisations to identify target markets. Stick each sample on a separate large sheet of paper. Point out the good and bad points of each method used to identify target markets.

What you must do to gain 10-13 marks/mark band 3

- a detailed assessment of the range of promotional techniques and materials the organisation uses, showing how they work together as a strategy and an analysis of the research methods used to identify target methods.

Suggested task

EITHER

Your teacher will give you an agenda for a Marketing Department staff meeting. You should make sure you participate in all parts of the meeting. You should make notes to take to the meeting with you. You should also add to your notes throughout the meeting.

OR

- respond to the e-mail 'Assess Promotional Techniques'. Your teacher will give you a copy of the e-mail.
- collect six samples of your organisations promotional materials. They should be different types of materials ie not all leaflets or posters. Assess each sample of promotional materials using the AIDA technique
- respond to the attached e-mail 'Analyse Market Research Methods used to Identify Target Markets'. Your teacher will give you a copy of the e-mail.
- write a memo to the Marketing Manager explaining how the organisations promotional techniques and materials work together as a strategy.

Formative Feedback

- on assessment of promotional techniques

- on assessment of promotional materials

- on how techniques and materials work together as a strategy

- on assessment of market research methods used to identify target market

Signature:

Date:



TITLE OF ASSESSMENT ACTIVITY - Working in the Marketing Department

What must be included in your portfolio:

You need to produce an investigation into the marketing activities of a leisure and tourism organisation. Your investigation must:

- d) **compare** one of the organisation's promotional campaigns with the promotional **campaign** of one other leisure or tourism organisation.

What you must do to gain 1-5 marks/mark band 1

- some attempt to compare one of the organisation's promotional campaigns with the promotional campaign of one other leisure or tourism organisation, reaching straightforward conclusions, some of which are clearly presented.

Suggested task

EITHER

Prepare a flipchart sheet that can be used in a presentation to the Finance Manager. It should identify a promotional campaign for your selected organisation and another campaign from a different leisure or tourism organisation. On the flipchart sheet identify the parts of the campaign that are the same and the parts of the campaign that are different.

OR

Complete a table identifying the similarities and differences between the two campaigns. Your teacher will give you a copy of the table to complete.

What you must do to gain 6-9 marks/mark band 2

- a comparison of one of the organisation's promotional campaigns with the promotional campaign of one other leisure or tourism organisation, reaching reasoned conclusions which are usually clearly presented.

Suggested task

- i) Produce a report comparing one of your organisation's promotional campaigns with another promotional campaign from a different leisure or tourism organisation. Your teacher will give you a report structure form to guide you. Remember to explain all the points you make in the report. Explain why you think they are the same and why they are different.

What you must do to gain 10-13 marks/mark band 3

- a detailed comparison of one of the organisation's promotional campaigns with the promotional campaign of one other leisure or tourism organisation, reaching substantiated conclusions which consistently are clearly presented.

Suggested task

Produce a report comparing one of your organisation's promotional campaigns with another promotional campaign from a different leisure or tourism organisation. Your teacher will give you a report structure form to guide you. Remember to explain and justify all the similarities and differences you find between the campaigns. In your comparative report you must substantiate your findings. This can be done in a number of different ways:

- i) research sales attendance figures before and after the campaigns and make comments on your findings
- ii) carry out a survey amongst some members of staff and ask their opinion of how the campaign worked
- iii) carry out a survey amongst customers of the organisation and find out if they know about the campaign and whether they responded by visiting the facility or buying the product promoted.

Formative Feedback

- on the level of detail provided in comparisons

- on the conclusions presented

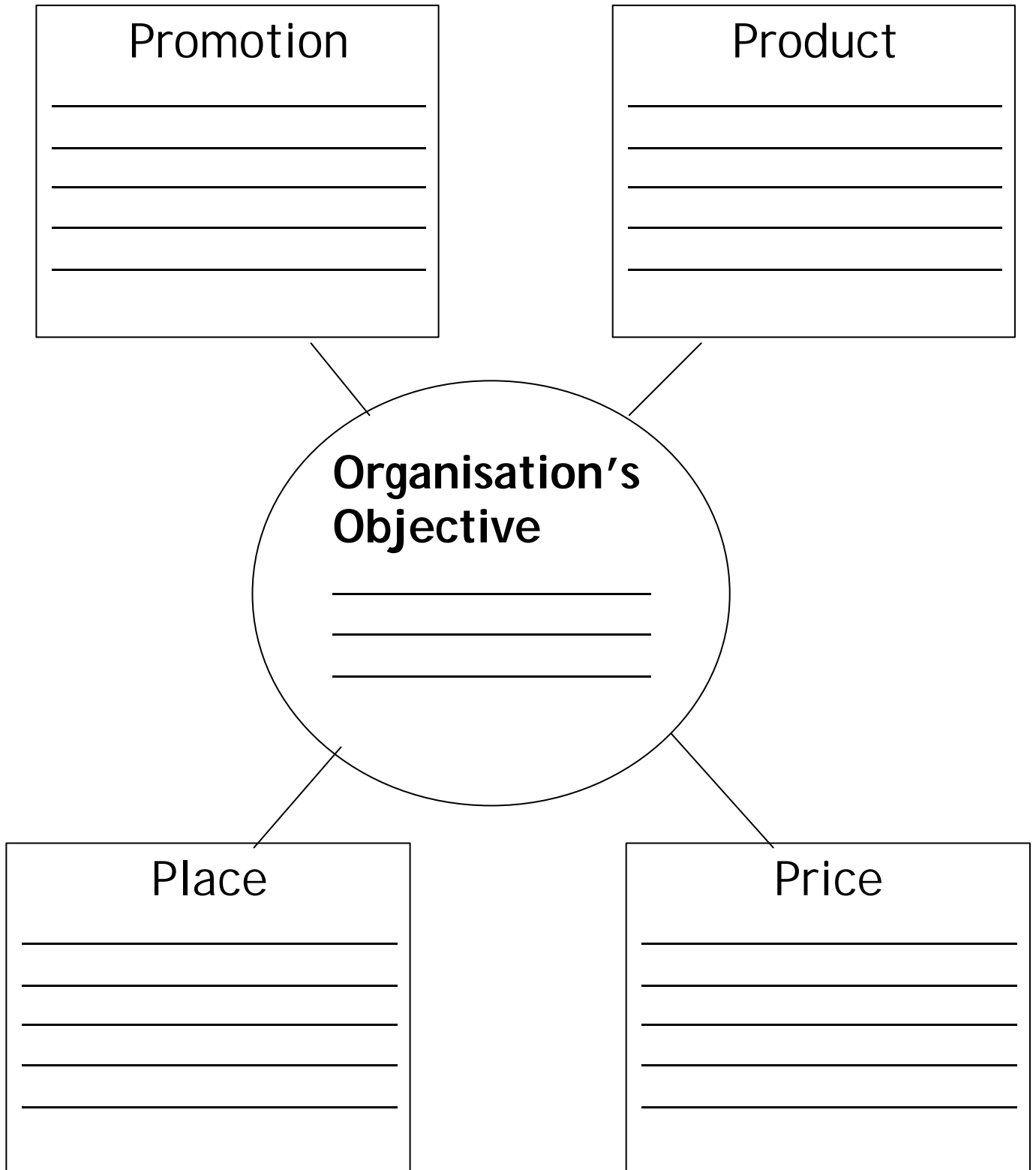
Signature:

Date:

Task a MB1

Diagram to Show How the 4Ps Work Together

4Ps



Task b MB1/2/3

Marketing Department Staff Meeting

AGENDA

.....
(Insert date of meeting)

1. Apologies for absence
2. Minutes from previous meeting
3. Promotional Techniques - an assessment
4. Promotional Materials - an assessment
5. Market research methods used to identify target markets - an assessment
6. How techniques and materials work together as a strategy (MB3 only)
7. AOB
8. Date of next meeting

Task c MB1**Name, Candidate**

From: mandywatson@ltorg.co.uk**To:** Candidate-Name@Ltorq.co.uk**Sent:** [Date]**Subject:** Promotional Techniques

We need to assess the promotional techniques we use. I am going to give you a list of techniques that we could be using. For **each** technique in the list can you:

- a) tick the ones we use
- b) describe how we use them
- c) assess how well we use them

Here is the list of techniques.

- advertising
- direct marketing
- public relations
- personal selling
- displays
- sponsorship
- demonstrations
- sales promotions

Can you e-mail me the information asap.

Thanks

Mandy

Task c MB1/2

Name, Candidate

From: mandywatson@ltorg.co.uk

To: Candidate-Name@Ltorg.co.uk

Sent: [Date]

Subject: Market Research

We need to assess the market research we use to identify our target markets. There are different methods of market research we could use. I need you to:

- a) tell me which ones we use
- b) describe how we use them
- c) assess how they are used to identify target markets

The market research methods are:

- observation
- postal surveys
- personal surveys
- telephone questionnaires
- the internet

Can you e-mail me your response asap.

Thanks

Mandy

Task c MB3**Name, Candidate**

From: mandywatson@ltorg.co.uk**To:** Candidate-Name@Ltorq.co.uk**Sent:** [Date]**Subject: Analyse Market Research Methods used to Identify Target**

We need to analyse the market research methods we use to identify target markets. There are different methods we can use and we might be able to increase our budget to undertake more research and use different methods. These are the techniques we could use:

- observation
- postal surveys
- personal surveys
- telephone questionnaires
- the Internet

Can you analyse what we do at the moment and the potential to include new methods. Remember to focus on research methods used to identify target markets.

Can you e-mail me your response asap.

Thanks

Mandy

Task c MB2/3**Name, Candidate**

From: mandywatson@lorg.co.uk**To:** Candidate-Name@Lorg.co.uk**Sent:** [Date]**Subject:** Assess Promotional Techniques

We need to assess the promotional techniques we use. We need to think about whether we are using them effectively. We might be able to increase our budget to use more techniques. Here are the techniques we could use:

- advertising
- direct marketing
- public relations
- personal selling
- displays
- sponsorship
- demonstrations
- sales promotions

Can you assess the ones we do use and then assess whether we should use any of the others?

Can you e-mail me your response asap.

Thanks

Mandy

Task d MB1

What is your organisations promotional campaign?	
Give a brief description	
What is the other Leisure and Tourism organisation you are using?	
What is the other organisations promotional campaign?	
Give a brief description	
What is similar about the campaigns?	
What is different about the campaigns?	

Task d MB2/3

Report into Promotional Campaigns

Title

Report to compare the Promotional Campaigns of (organisation A) and (organisation B)

Introduction

Give names of the two organisations and the campaigns to be compared.

Findings

Give a brief description of each campaign.

Then compare the campaigns under the following headings. Ensure any conclusions you make are researched and substantiated.

Campaign Objectives

Campaign Target Markets

Promotional Techniques used

Promotional Materials used

An evaluation of the success and monitoring of your campaign.

Conclusions

Summary of all main conclusions

Unit 2 - Marketing in Leisure and Tourism

Teacher Guidance Notes

Title of Assessment Activity: Working in the Marketing Department

Task a)

This task is in two parts. Students are required to describe the organisations 4Ps **and** explain how they work together to meet the organisations objectives.

- (i) Is where students describe the organisations 4Ps. The task at MB1 can be used as a starting point for all students and developed to move across the mark bands and gain more marks as indicated. Where students elect to present their poster in an informal meeting for MB2, an Observation Statement has been produced and is attached. It should be completed by the assessor, adopting the role of Marketing Manager. Higher marks are awarded for detail in descriptions.
- (ii) Is where students explain how the 4Ps work together to meet the organisations objectives. The task at MB1 can be used as a starting point for all students and developed to move across the mark bands. An outline diagram is attached for students to use as a starting point. Alternatively, students can enter and commence the task at the Mark Band appropriate for their potential achievement. For MB1 and 2, at least two objectives are required. For MB3, at least three objectives are required. When students select the organisations objectives, they should be encouraged to select ones that are more general and open such as:
- to make a profit
 - to maximise profit
 - to increase customer base
 - to extend the product life cycle
 - to increase year round usage

These objectives or similar, for example, would not be recommended:

- to become more involved in the community
- to increase locations throughout the country
- to promote more effectively

Higher marks are awarded for understanding of how well the 4Ps work **together** to meet the organisations objectives.

Task b)

This task requires students to produce an item of promotional material. Students could enter the task at MB1 by producing a draft item and following feedback, continue to develop their drafts in order to move through the mark bands. Alternatively, students could enter the task at the appropriate mark band for their potential. Higher marks are awarded for students showing innovation and clear links to target markets. Students are not required to produce supporting information. They should be assessed on the basis of the promotional material only.

Task c)

This task is in three parts. They can complete the task in one activity - participation in a meeting or through three (or four for MB3) separate activities. If they complete the tasks through one activity they should ensure all aspects of the task are addressed. Students are required to

- (i) assess the promotional techniques of the organisation
- (ii) assess the promotional materials of the organisation
- (iii) assess the market research methods used to identify target markets

The Meeting

The meeting task can be accessed at all MB levels, by all students. It is students performance in the meeting that will determine the mark band and mark awarded. An agenda for the meeting is provided. Students should participate in items 3, 4 and 5. Items 1, 2, 6 and 7 could be conducted by the assessor. It is recommended that no more than four students are involved in the meeting at any one time in order for the assessor/observer to accurately record candidate performance. A summary sheet is attached which assessors/observers can use to record candidate performance. An observation statement is also attached. This should be produced for each individual candidate. A copy of the summary sheet and any supporting evidence should be attached. For higher mark bands, students would normally be expected to have produced supporting notes that could be attached as evidence.

Separate Tasks

- (i) Students are required to respond to an email. The email to be used by MB1 students is different to that to be used by MB2/3 students.
- (ii) The MB1 task could be used for students that are able to achieve at MB2. They can take an alternative approach for MB2 and 3. A wider range of materials must be assessed for MB2 and MB3.
- (iii) Students are required to respond to an email. The same email is used for MB1 and MB2. There is a different email for MB3. For MB2, an alternative approach is suggested.
- (iv) This task is only for MB3.

Task d)

This task requires students to compare promotional campaigns. Students must compare campaigns and not the organisations, their individual materials or general promotional activities. For MB1, a table has been produced for students to complete. For MB2 and 3, students are encouraged to produce a report. For MB3 students will have to complete additional research in order to obtain data that can be used to substantiate conclusions.

Task a) MB1

Observation Statement

Unit: Marketing in Leisure and Tourism

Activity: Description of Organisations 4Ps

Candidate Name: <i>[Insert student name]</i> Date: <i>[Insert date of activity]</i>

Situation

Student produced a *[poster/PowerPoint presentation]* describing the selected organisations 4Ps. They gave a presentation to me to give more detail to their description.

Student Performance

Product

[Insert summary of students' description of the organisations product]

Price

[Insert summary of students' description of the organisations price]

Place

[Insert summary of students' description of organisations place]

Promotion

[Insert summary of students' description of organisations promotion]

Supporting Evidence

[Insert poster/PowerPoint presentation printout.]

Assessment

[Insert summary of overall performance as related to mark band descriptors.]

Mark Band:

Mark awarded

Signed

Date

Task a) MB1

Observation Statement

Unit: Marketing in Leisure and Tourism

Activity: Description of Organisations 4Ps

Candidate Name:	Date
-----------------	------

Situation

Student produced a _____ describing the selected organisations 4Ps.
They gave a presentation to me to give more detail to their description.

Student Performance

Product

Price

Place

Promotion

Supporting Evidence

Assessment

Mark Band:

Mark awarded

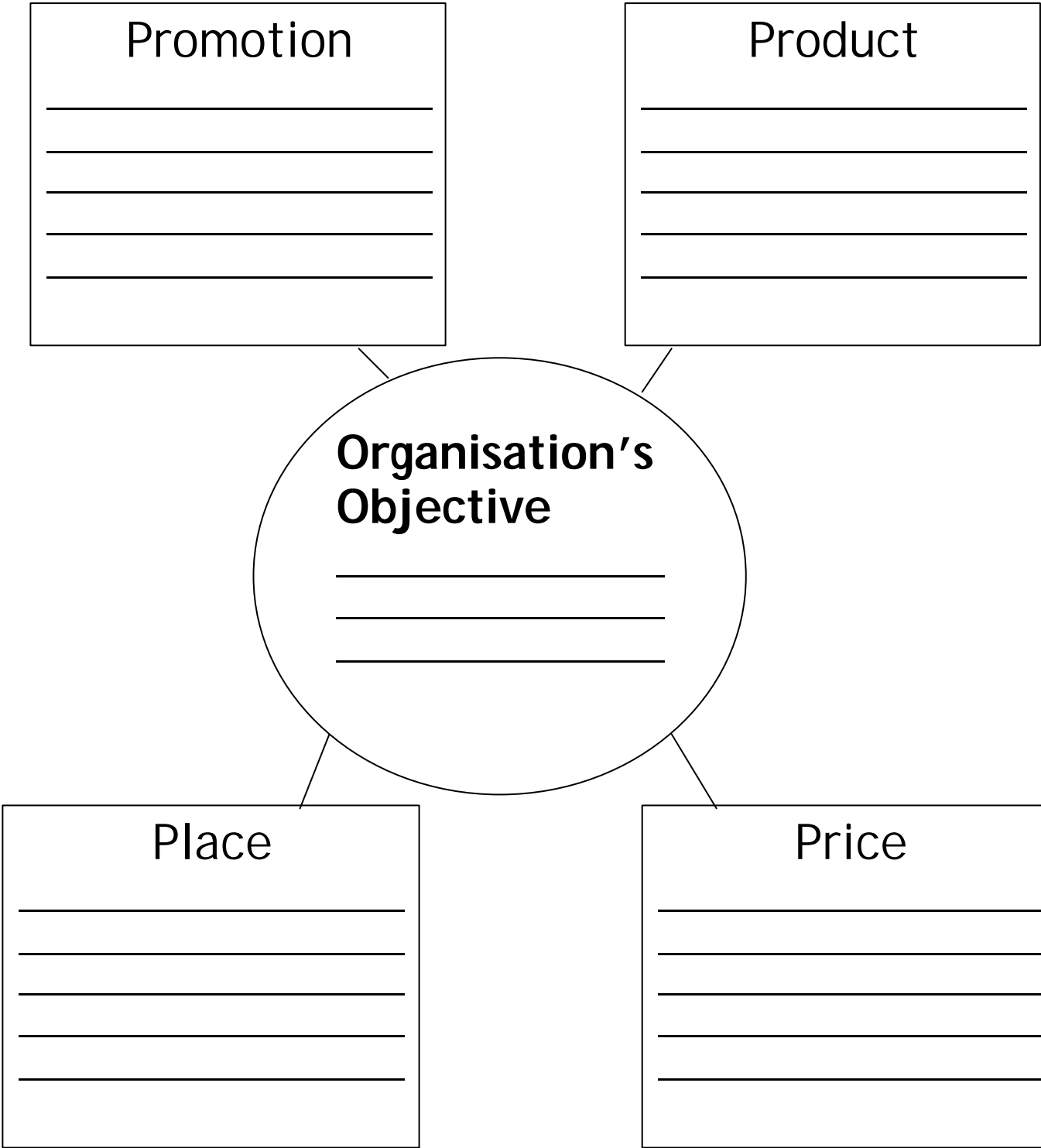
Signed

Date

Task a MB1

Diagram to Show How the 4Ps Work Together

4Ps



Task c) MB1/2/3

Marketing Department Staff Meeting

AGENDA

.....
[Insert Date of Meeting]

1. Apologies for absence
2. Minutes from previous meeting
3. Promotional Techniques - an assessment
4. Promotional Materials - an assessment
5. Market research Methods used to Identify Target Markets - an assessment
6. AOB
7. Date of next meeting

Assessment Feedback Sheet

Unit 2: Marketing in Leisure and Tourism

a) Describe the 4Ps in relation to the selected organisation and show how they work together to meet the organisation's objectives.

STUDENT NAME:							
	Mark band 1		Mark band 2		Mark band 3		Mark awarded
Criteria and mark ranges	<ul style="list-style-type: none"> A basic description of the 4Ps in relation to the selected organisation; some attempt to show how they work together to meet the organisation's objectives 	1-4	<ul style="list-style-type: none"> A sound description of the 4Ps in relation to the selected organisation; an explanation of how they work together to meet the organisation's objectives 	5-7	<ul style="list-style-type: none"> A detailed description of the 4Ps in relation to the selected organisation; a thorough understanding of how they work together to meet the organisation's objectives 	8-10	
Comments and page references	<p>Description of the 4Ps</p> <p><i>Product</i></p> <p><i>Price</i></p> <p><i>Place</i></p> <p><i>Promotion</i></p> <p><i>Overall</i></p> <p>The explanation of how they work together to meet the organisations objectives</p>						

Assessor:

Signed:

Date:

Internally Verified:

Signed:

Date:

Assessment Feedback Sheet

Unit 2: Marketing in Leisure and Tourism

b) Include an item of promotional material you have produced for the organisation, designed to attract a particular target market

STUDENT NAME:							
	Mark band 1		Mark band 2		Mark band 3		Mark awarded
Criteria and mark ranges	<ul style="list-style-type: none"> A simple design for the item of promotional material that includes basic information about the organisation but not clearly targeted at a particular market 	1-6	<ul style="list-style-type: none"> An effective and imaginative design for the item of promotional material that includes all necessary information for an identified target market 	7-10	<ul style="list-style-type: none"> A well-structured, innovative and creative item of promotional material that shows an in-depth understanding of target marketing 	11-14	
Comments and page references	<p>Design and structure of material</p> <p>Creativity and innovation of material</p> <p>Information provided in material</p> <p>Links to target market within material</p>						

Assessor:

Signed:

Date:

Internally Verified:

Signed:

Date:

Assessment Feedback Sheet

Unit 2: Marketing in Leisure and Tourism

c) Assess the range of promotional techniques and materials the organisation uses, including market research methods used to identify target markets

STUDENT NAME:							
	Mark band 1		Mark band 2		Mark band 3		Mark awarded
Criteria and mark ranges	<ul style="list-style-type: none"> A description with some assessment of the main promotional techniques and materials the organisation uses and of the research methods used to identify target markets 	1-5	<ul style="list-style-type: none"> An assessment of the main promotional techniques and materials the organisation uses and of the research methods used to identify target markets 	6-9	<ul style="list-style-type: none"> A detailed assessment of the range of promotional techniques and materials the organisation uses, showing how they work together as a strategy and an analysis of the research methods used to identify target markets 	10-13	
Comments and page references	<p>Assessment of promotional techniques</p> <p>Assessment of promotional materials</p> <p>Coverage of ho techniques and materials work together as a strategy</p> <p>Assessment and/or analysis of the research methods used to identify target markets</p>						

Assessor:

Signed:

Date:

Internally Verified:

Signed:

Date:

Assessment Feedback Sheet

Unit 2: Marketing in Leisure and Tourism

d) Compare one of the organisation's promotional campaigns with the promotional campaign of one other leisure or tourism organisation

STUDENT NAME:							
	Mark band 1		Mark band 2		Mark band 3		Mark awarded
Criteria and mark ranges	<ul style="list-style-type: none"> Some attempt to compare one of the organisation's promotional campaigns with the promotional campaign of one other leisure or tourism organisation, reaching straightforward conclusions, some of which are clearly presented 	1-5	<ul style="list-style-type: none"> A comparison of one of the organisation's promotional campaigns with the promotional campaign of one other leisure or tourism organisation, reaching reasoned conclusions, some of which are usually clearly presented 	6-9	<ul style="list-style-type: none"> A detailed comparison of one of the organisation's promotional campaigns with the promotional campaign of one other leisure or tourism organisation, reaching substantiated conclusions, some of which consistently are clearly presented 	10-13	
Comments and page references	<p>The detail in the comparison of one of the organisations promotional campaigns with the campaign of one other leisure or tourism organisation</p> <p>The reasoning and substantiation of the conclusions</p> <p>The clarity of the presentation</p>						

Assessor:

Signed:

Date:

Internally Verified:

Signed:

Date:



Leisure and Tourism




Unit 3 - Customer Service in Leisure and Tourism

Student Assessment Activities

advancing learning, changing lives

Professional Development and Training

TITLE OF ASSESSMENT ACTIVITY	Excellence in Customer Service
SUBJECT	Customer Service in a Leisure and Tourism Organisation
UNIT NUMBER AND TITLE	Unit 3: Customer Service in Leisure and Tourism

	GET READY:	<p>You need to produce a review of the customer service provided by a selected leisure and tourism organisation. You also need to produce a record of your involvement in a variety of real or simulated customer service situations.</p>
	GET SET:	<p>You are working for your selected leisure and tourism organisation. The company wants to improve their customer service to make sure they are better than the competition. You have been asked to work with a small group of staff on a project called 'Excel Yourself - Excel Us'. You are going to do a number of activities on behalf of the organisation. Some of the activities are to do with training staff to provide better customer service. Other activities are to obtain information so that you can see where improvements and training are needed.</p> <p>You will need a number of other documents to help you complete these tasks - ask your teacher for them as you need them.</p>
	GO:	<p>You need to produce a review of the customer service provided by a selected leisure and tourism organisation. You also need to produce a record of your involvement in a variety of real or simulated customer service situations.</p> <p>Here's what you must include:</p> <ol style="list-style-type: none"> describe the situations that require staff to have contact with customers and the type of customer records that need to be completed include an assessment of the ways in which the chosen organisation meets the needs of its different customers, the methods of communication used by the staff and the ways used to deal with complaints evaluate the appropriateness of the customer service provided by the organisation. <p>You also need to produce a record of your involvement in a variety of real or simulated customer service situations, which should:</p> <ol style="list-style-type: none"> include evidence of your dealings with a variety of customers and the outcomes from your handling of a customer complaint.



TITLE OF ASSESSMENT ACTIVITY - Excellence in Customer Service

What must be included in your portfolio:

You need to produce a review of the customer service provided by a selected leisure and tourism organisation. Your work must:

- a) **describe** the situations that require staff to have contact with customers **and** the type of customer records that need to be completed.

What you must do to gain 1-3 marks/mark band 1

- a description of some situations that require staff to have contact with customers and an indication of the type of customer records that would be completed for most of the situations.

Suggested task

Choose ONE of the following:

- i) Draw a plan of your selected organisation. Produce a storyboard that takes new staff around the organisation and describes situations where they would have contact with customers. Your storyboard should show what the customer experiences and the types of records that would be completed for each situation.
- ii) Produce a staff booklet for your organisation. Your booklet must describe situations where staff would have contact with customers and show records that would be completed.
- iii) Take photographs of different people in your organisation. Put your photographs on a large piece of card or paper. For each photograph make a 'bubble' and describe a situation where that member of staff would have contact with a customer and the records that would be completed.
- iv) Produce a notice board for the staff room. Your notice board is to support staff in the organisation. The notice board needs to remind them of where they will have contact with customers and the records that they will have to complete.

What you must do to gain 4-5 marks/mark band 2

- a clear and coherent description of a range of situations that require staff to have contact with customers and a clear statement of the type of customer records that would be completed for each situation.

Suggested task - follow the same one as you chose for mark band 1

- i) Add detail to your storyboard or add more situations. Make sure your storyboard includes the types of records that would be completed for each situation.
- ii) Add detail to the descriptions in your staff booklet or add more situations. Make sure you show records that would be completed.
- iii) Describe more situations for each member of staff you have photographed or add detail to the ones you have completed so far. Remember to include details of records that would be completed.
- iv) On your noticeboard make sure there is information that describes each of the situations. Add more situations and also make sure you have included records that need to be completed.

What you must do to gain 6-7 marks/mark band 3

- a well structured and exemplified description of a wide range of situations that require staff to have contact with customers and a description of the type of customer records that would be completed for each situation.

Suggested task - keep with the one you have worked on

- i) Add more detail to your storyboard or even turn it into a script for a training video. For each situation you have included make sure you describe the record(s) that would be completed.
- ii) Your staff booklet must provide detailed descriptions of situations where staff would have contact with customers and describe all records that would be completed in each situation.
- iii) For each photograph make a 'bubble' and provide a detailed description of a situation where that member of staff would have contact with a customer and all the records that would be completed. You might need to add more photographs. You must describe a record for each situation described.
- iv) The notice board needs to provide a detailed description of situations that require staff in your organisation to have contact with customers and a description of the records that are completed in each situation.

Formative Feedback - on description of situations

Formative Feedback - on description of customer records

Signature:

Date:



TITLE OF ASSESSMENT ACTIVITY - Excellence in Customer Service

What must be included in your portfolio:

You need to produce a review of the customer service provided by a selected leisure and tourism organisation. Your work must:

- b) include an **assessment** of the ways in which the chosen organisation meets the needs of its different customers, the methods of communication used by the staff **and** the ways used to deal with complaints.

What you must do to gain 1-5 marks/mark band 1

- a description with some assessment of the ways in which the organisation meets the needs of some customers, the methods of communication used by staff and they ways used to deal with complaints. The assessments are straightforward and broadly relevant and some are clearly presented.

Suggested task

i) EITHER

The Quality Department want to assess how good or bad the organisation is at meeting customer needs. They have produced a table that you are to complete. Your teacher will give you Table 1 to complete.

OR

You have been asked to produce a PowerPoint presentation for the Quality Department assessing how good or bad your selected organisation is at meeting different customer needs.

ii) EITHER

The Quality Department has been so impressed with your work they have asked you to do some more assessment for them. They now want you to assess the methods of communication used by staff in the organisation. You need to say how good or bad they are. There is another table for you to complete. - your teacher will give you Table 2.

OR

The Quality Department has asked you to identify some job roles within the organisation and to report on the methods of communication they use. Comment on how good or bad these methods are. Send an e-mail on your findings to the Quality Department Manager.

iii) EITHER

You have been asked to tell the Quality Department about how well two complaints that you observed have been handled. You are to produce a PowerPoint presentation and assesses how good/bad each complaint was dealt with

OR

Attend a meeting with the Quality Department Manager assessing how good or bad each complaint was dealt with. Your teacher will give you the agenda for the meeting (Agenda 1)

OR

You are to prepare a report on your findings on how the organisation deals with complaints.

What you must do to gain 6-9 marks/mark band 2

- an assessment of the ways in which the organisation meets the needs of a range of customers, the methods of communication used by staff and the ways used to deal with complaints. The assessments are relevant and are usually clearly presented.

Suggested task - you should follow the same option as you chose for mark band 1

i) EITHER

You must make sure that Table 1 is completed in some detail. You also need to make sure you have considered a range of customers. Remember this is about customer service. The content must be relevant and clearly presented.

OR

You must make sure you have assessed customer service for a range of customers and given some detail in your PowerPoint presentation. The content must be relevant and clearly presented.

ii) EITHER

You must make sure that Table 2 is completed in some detail with a focus on assessment. Check it is all relevant and clearly presented.

OR

The Quality Department has asked you to look at different members or staff in your organisation and report on the methods of communication they use. For each method of communication you need to say how good or bad it is in different situations. Send an e-mail on your findings to the Quality Department Manager. Make sure it is detailed, relevant and clearly presented.

iii) EITHER

You have been asked to tell the Quality Department about how well the complaints procedure is working. You are to produce a PowerPoint presentation which assesses how good/bad the procedure is, making reference to different complaints you have observed or researched. Your assessments must be relevant and clearly presented.

OR

Attend a meeting with the Quality Department Manager assessing how good or bad the complaints procedure in the organisation is. Your teacher will give you the agenda for the meeting (Agenda 2). Make sure you have notes prepared to help you in your meeting. During the meeting, make sure your contribution is relevant and clearly presented.

OR

Remember to add detail to your findings given in the report assessing how the organisation deals with the complaints. Make sure your report is relevant and clearly presented.

What you must do to gain 10-13 marks/mark band 3

- a detailed assessment of the ways in which the organisation meets the needs of a wide range of customers, the methods of communication used by staff and the ways used to deal with complaints. The assessments are accurate, valid, relevant and are consistently clearly presented.

Suggested task - you should follow the same task as for mark bands 1 and 2

i) EITHER

When completing Table 1 make sure your assessments are detailed, relevant, accurate and valid. You need to have looked at the needs of many different customers.

OR

You must make sure you have assessed customer service for a range of customers and given some detail in your PowerPoint presentation. Your assessments must be clearly presented and must be accurate, valid and relevant.

ii) EITHER

You must make sure when completing Table 2, that your assessments are detailed, accurate, relevant and valid. Your assessments should relate to different staff, in different situations, using different methods of communication.

OR

You will look at a range of different staff members and different types of communication each member of staff uses and make an assessment on each and give a summary. You are to send an e-mail on your findings to the Quality Department Manager. You must make sure your assessments are detailed, accurate, valid and relevant and consistently clearly presented.

OR

You are to prepare and present a PowerPoint presentation to report your findings on how different members of staff use different types of communication. Remember to make your assessments detailed, accurate, valid, relevant and consistently clearly presented.

iii) The project continues to be well supported because of the good work you are doing. You have been asked to tell the Quality Department about how well the complaints procedure is working. As part of your assessment of the procedure you will also investigate a range of complaints the organisation has had and assess how well these were dealt with to support your overall judgements about the procedure.

EITHER

You are to produce a PowerPoint presentation which assesses how well the organisation deals with complaints. Your assessment must be detailed, valid, relevant, accurate and consistently clearly presented

OR

Attend a meeting with the Quality Department Manager assessing how good or bad the organisation is at dealing with complaints. Make your assessments detailed, accurate, valid, relevant and consistently clearly presented. Your teacher will give you the Agenda for the meeting (Agenda 3). You should take notes you have prepared to the meeting and your teacher can use them as evidence. Any additional notes you make during the meeting should also be given to your teacher.

OR

Produce a detailed written report on your findings assessing how the organisation deals with complaints. Ensure your assessments are detailed, accurate, valid and relevant and consistently clearly presented.

Formative Feedback on the assessment of ways in which the organisation meets the needs of its customers

Formative Feedback on the assessment of methods of communication used by staff

Formative Feedback on the assessment of the ways used to deal with complaints.

Signature:

Date:



TITLE OF ASSESSMENT ACTIVITY - Excellence in Customer Service

What must be included in your portfolio:

You need to produce a review of the customer service provided by a selected leisure and tourism organisation. Your work must:

- c) **evaluate** the appropriateness of the **customer service** provided by the organisation.

What you must do to gain 1-7 marks/mark band 1

- an ability to review and comment appropriately on the level of customer service provided by the organisation, reaching straightforward conclusions.

Suggested task

- i) You are to act as a mystery shopper in your chosen organisation. Produce a mystery shopper checklist, like the one attached, that you can use to grade your organisation's customer service.
- ii) Produce a PowerPoint presentation to summarise your main findings in preparation for a meeting.

What you must do to gain 8-12 marks/mark band 2

- an ability to review and evaluate in some depth the level of customer service provided by the organisation, reaching reasoned conclusions and suggesting improvements.

Suggested task

i) EITHER

Produce a mystery shopper checklist, like the one attached. Add benchmarking criteria to grade the customer service provided by your organisation.

OR

Conduct a survey of the customers of your organisation. Prepare a questionnaire that can be completed that relates to key customer service quality criteria.

ii) Present your findings, in preparation for a meeting to discuss them, as either:

- a newsletter
- a flip chart
- a PowerPoint presentation
- a report

Summarise both the good and the bad points that you found.

You must provide reasoned conclusions **and** suggest improvements.

What you must do to gain 13-17 marks/mark band 3

- an ability to analyse and evaluate the customer service provided by the organisation, reaching substantiated conclusions, suggesting improvements and justifying the recommendations.

Suggested task

- i) The Quality Department are keen to know what customers think of the customer service provided by the organisation. The project team has been asked to investigate how good the customer service is.

EITHER

Produce a mystery shopper checklist, like the one attached. Add benchmarking criteria to grade the customer service provided by your organisation.

OR

Conduct a survey of the customers of your organisation. Prepare a questionnaire that can be completed that relates to key customer service quality criteria.

- ii) The Quality Department has asked the project team to produce the findings in different formats.

EITHER

- a newsletter
- a flip chart
- a PowerPoint presentation
- a report

Your team have said you can choose the format you want to use. You must concentrate on conclusions you can substantiate from your findings and you must justify the improvements and recommendations you are suggesting.

MYSTERY SHOPPER CHECKLIST - EXAMPLE

TYPE OF ORGANISATION: LEISURE CENTRE

Service Standard		Y	N	Comments
Appearance				
Lighting	All working, welcoming			
Fascia				
Doors				
Staff	Clean, tidy, uniform, name badge			
Health, Safety and Hygiene				
Notices				
Toilets	Clean, hygiene regularly checked			
Fire Exits				
Floors	Clean, no spillages or wet surfaces, no loose carpeting			
Communication				
Rapport				
Greeting	Eye contact, smile			
Body Language				
Personality	Friendly, helpful			
Information and Advice				
Signage	Clear			
Displays	Up-to-date, eye catching, informative			
Staff				
Information sheets				

Completed by:

Date:

Time:

Formative Feedback on detail given in evaluation

Formative Feedback on substantiation of conclusions

Formative Feedback on justification of improvements suggested

Signature:

Date:



TITLE OF ASSESSMENT ACTIVITY - Excellence in Customer Service

What must be included in your portfolio:

You need to produce a review of the customer service provided by a selected leisure and tourism organisation. You must also produce a record of your involvement in a variety of real or simulated customer service situations, which should:

- d) include evidence of your dealings with a **variety** of customers and the outcomes from your **handling of a customer complaint**.

What you must do to gain 1-5 marks/mark band 1

- an ability to communicate with some customers in a manner that is helpful and friendly and to deal in part with a customer complaint.

Suggested task

- i) EITHER
When on work experience in a leisure and tourism organisation, collect evidence of your dealings with customers.

OR
Take part in role plays or leisure and tourism activities that your teacher has organised for you.
- ii) Respond to the complaint letter attached.

What you must do to gain 6-9 marks/mark band 2

- an ability to communicate clearly with a range of customers in a manner that is helpful and friendly and to deal appropriately with a customer complaint.

Suggested task

i) EITHER

When on work experience in a leisure and tourism organisation, collect evidence of your dealings with customers. Make sure you have evidence of at least two different types of customer in different situations. Your evidence should show you have dealt with the customers in a manner that is helpful and friendly and you must have communicated clearly.

OR

Take part in role plays or leisure and tourism activities that your teacher has organised for you. You need to deal with at least two different types of customer in different situations.

ii) Respond to the complaint letter attached.

What you must do to gain 10-13 marks/mark band 3

- an ability to consistently and confidently communicate with a wide range of customers in a manner that is helpful and friendly and to deal fully and confidently with a customer complaint.

Suggested task

i) EITHER

When on work experience in a leisure and tourism organisation, collect evidence of your dealings with customers. Make sure you have evidence of at least three different types of customer in different situations. Your evidence should show you have dealt with customers confidently and communicated effectively and clearly and have been helpful and friendly.

OR

Take part in role plays or leisure and tourism activities that your teacher has organised for you. You need to deal with at least three different types of customer in different situations.

ii) Respond to the complaint letter attached.

Task d ii) MB1/2/3

3 Any Street
Anytown
AN2 3AN

Date

Gray Leisure
44 Milton Lane
Anytown
AN1 4DG

Dear Sir

I wish to make a complaint regarding my visit to your leisure centre on Thursday evening.

I arrived after a hard days work, looking forward to a relaxing swim and sauna. When I was in the changing rooms I realised I didn't have the change for the locker. The receptionist told me she only had two pound coins so couldn't change a £5 note. I had to leave my things on the bench.

After my swim, I got back to the changing rooms and found my mobile phone was missing. When I got dressed I complained to the receptionist. I then had to explain it all to the Duty Manager. All I got from him was 'your membership clearly says we are not liable for belongings'.

I am disgusted that you don't have the service where I can get the change to use the lockers. I don't see why I should have to pay for a new mobile phone just because you couldn't change a £5 note.

I told the Duty Manager that I was going to complain and I expect you to pay for a new mobile phone for me.

I look forward to hearing from you.

Yours faithfully

Guy Derry

GRAY LEISURE DUTY LOG

Time	Action
18.35	Securicor collected takings for the day
19.15	Mr Derry complained that he had his mobile phone stolen from the changing rooms. He had not placed his belongings in a locker. I pointed out that it is clearly stated in our policy that the company cannot be held responsible for personal belongings whilst on the premises. Unfortunately, Mr Derry was not happy when he left and said he would be writing to complain.
21.10	Mrs Davies slipped in the shower as someone had removed the rubber mat for cleaning purposes. Also entered into the Accident Book.

Formative Feedback on dealing with customers

Formative Feedback on handling a complaint

Signature:

Date:

Assessment Feedback Sheet

Unit 3: Customer Service in Leisure and Tourism

a) Describe the situations that require staff to have contact with customers and the type of customer records that need to be completed

STUDENT NAME:							
	Mark band 1		Mark band 2		Mark band 3		Mark awarded
Criteria and mark ranges	<ul style="list-style-type: none"> A description of some situations that require staff to have contact with customers and an indication of the type of customer records that would be completed for most situations 	1-3	<ul style="list-style-type: none"> A clear and coherent description of situations that require staff to have contact with customers and a clear statement of the type of customer records that would be completed for each situation 	4-5	<ul style="list-style-type: none"> A well-structured and exemplified description of a wide range of situations that require staff to have contact with customers and a description of the type of customer records that would be completed for each situation. 	6-7	
Comments and page references	<p>Description of situations that require staff to have contact with customers</p> <p>Description of customer records</p> <p>Link between situations and records</p>						

Assessor:

Signed:

Date:

Internally Verified:

Signed:

Date:

Assessment Feedback Sheet

Unit 3: Customer Service in Leisure and Tourism

- b) Include an assessment of the ways in which the chosen organisation meets the needs of its different customers, the methods of communication used by the staff and the ways used to deal with complaints

STUDENT NAME:							
	Mark band 1		Mark band 2		Mark band 3		Mark awarded
Criteria and mark ranges	<ul style="list-style-type: none"> A description with some assessment of the ways in which the organisation meets the needs of some customers, the methods of communication used by staff and the ways used to deal with complaints. The assessments are straightforward and broadly relevant and some are clearly presented. 	1-5	<ul style="list-style-type: none"> An assessment of the ways in which the organisation meets the needs of a range of customers, the methods of communication used by staff and the ways used to deal with complaints. The assessments are relevant and are usually clearly presented. 	6-9	<ul style="list-style-type: none"> A detailed assessment of the ways in which the organisation meets the needs of a wide range of customers, the methods of communication used by staff and the ways used to deal with complaints. The assessments are accurate, valid, relevant and consistently clearly presented. 	10-13	
Comments and page references	<p>Assessment of the ways in which the organisation meets the needs of customers</p> <p>Assessment of the methods of communication used by staff</p> <p>Assessment of the ways used to deal with complaints</p> <p>Accuracy, validity, relevance and presentation of assessments</p>						

Assessor:

Signed:

Date:

Internally Verified:

Signed:

Date:

Assessment Feedback Sheet

Unit 3: Customer Service in Leisure and Tourism

c) Evaluate the appropriateness of the customer service provided by the organisation

STUDENT NAME:							
	Mark band 1		Mark band 2		Mark band 3		Mark awarded
Criteria and mark ranges	<ul style="list-style-type: none"> An ability to review and comment appropriately on the level of customer service provided by the organisation, reaching straightforward conclusion 	1-7	<ul style="list-style-type: none"> An ability to review and evaluate in some depth the level of customer service provided by the organisation, reaching reasoned conclusions and suggesting improvements 	8-12	<ul style="list-style-type: none"> An ability to analyse and evaluate the customer service provided by the organisation, reaching substantiated conclusions and justifying the recommendations 	13-17	
Comments and page references	<p>Detail and depth of the evaluation of the customer service provided by the organisation</p> <p>Reasoning and substantiation of conclusions</p> <p>Suggestion and justification of recommendations</p>						

Assessor:

Signed:

Date:

Internally Verified:

Signed:

Date:

Assessment Feedback Sheet

Unit 3: Customer Service in Leisure and Tourism

d) Include evidence of your dealings with a variety of customers and the outcomes from your handling of a customer complaint

STUDENT NAME:							
	Mark band 1		Mark band 2		Mark band 3		Mark awarded
Criteria and mark ranges	<ul style="list-style-type: none"> An ability to communicate with some customers in a manner that is helpful and friendly and to deal in part with a customer complaint 	1-5	<ul style="list-style-type: none"> An ability to communicate clearly with a range of customers in a manner that is helpful and friendly and to deal appropriately with a customer complaint 	6-9	<ul style="list-style-type: none"> An ability to consistently and confidently communicate with a wide range of customers in a manner that is helpful and friendly and to deal fully and confidently with a customer complaint 	10-13	
Comments and page references	<p>Range of customers dealt with</p> <p>Ability to communicate when dealing with customers</p> <p>Manner when dealing with customers</p> <p>Effectiveness in dealing with customer complaint</p>						

Assessor:

Signed:

Date:

Internally Verified:

Signed:

Date:

Unit 3 - Customer Service in Leisure and Tourism

Teacher Guidance notes

Title of Assessment Activity: Excellence in Customer Service

Task a)

There are two requirements for this task. Students are required to describe situations that require staff to have contact with customers. They are also required to describe customer records used in each situation. For students to gain higher marks, they must be linked. There are four different approaches given to this task. Each of them can be accessed at MB1 and developed to move across the Mark Bands. At higher marks, there should be detail in descriptions of both situations and records and descriptions should be exemplified.

Task b)

This task is in three parts and has been written as three separate activities to ensure students address each requirement. All parts of the task require students to assess different aspects of the organisations customer service. This task relates to the internal workings of the organisation - their practices and procedures. Students are given a choice of how to complete each part of the task. All tasks are initiated at Mark Band 1 and developed through the Mark Bands. Students with the potential to access higher Mark Bands might still benefit from starting work at Mark Band 1 so that formative feedback can be given to support development.

(i) Students can complete a table which has been provided. The same table can be used for each Mark Band. Detail is required for higher marks and students need to show their assessments are accurate, valid and relevant. Alternatively, they can produce a PowerPoint presentation. The same task is appropriate for all three Mark Bands as it is the quality of the students work that determines the mark awarded.

(ii) There are two alternatives for this part of the task. Students can complete a table that has been provided. They will need to identify the methods of communication and put them into the table as given in the example eg telephone. This will need to be applied to their selected organisation and might include fax, email, meeting, presentation, pager, tannoy, mobile phone etc. Alternatively, they have been asked to send an email to the Quality Department Manager. This could be produced in draft form or, where a centre provides students with an email facility, it could be forwarded to the assessor. Finally, they can produce a PowerPoint presentation of their findings.

(iii) There are three options for this part of the task. The first is to produce a PowerPoint presentation. The second is to attend a meeting with the Quality Manager. There are three different agendas for the meeting depending on the ability of the candidate. They should be given the agenda appropriate for their ability and potential. If the latter option is chosen, assessors will need to complete an Observation Statement and a pro-forma for this part of the task is attached. The third option allows students to submit a written report.

Task c)

This task requires students to review the customer service in the organisation from the point of view of the end user - the customer. It is written in two parts: to undertake the research and to present the findings. At the lower Mark Bands it is suggested that candidate participate in a Mystery Shopper exercise. To assist the process, a Mystery Shopper Checklist for a leisure centre has been provided. This is not complete. Students will need to complete this fully if they are going to use it for reviewing customer service in a leisure centre. If their selected organisation is not a leisure centre, it can be adapted to be relevant to their chosen organisation. It is merely a guide to the type of checklist that should ideally be completed. This approach can be used for all Mark Bands.

For the higher Mark Bands, another approach is suggested - conducting a survey of the organisations customers. For this approach they will need to produce a questionnaire or similar that can be used to determine customers view of the customer service of the organisation.

For the lower Mark Bands, a PowerPoint presentation has been suggested. For the higher Mark Bands, there is a range of presentation methods suggested.

Task d)

This task requires students to deal with customers in real or simulated situations. The task is written with two approaches: through work experience or through simulated role plays. Students can mix approaches where their evidence may come from both sources.

Where students evidence is produced through work experience it must be in leisure and tourism contexts. If their performance is not observed by an assessor, a Witness Testimony is required from a member of staff within the organisation that observed the situation. Alternatively, students can produce a Personal Statement. In either case, this must include details of the customer, the situation and Students performance. It should be signed and dated by the witness and the candidate. There should be a summative statement by an assessor confirming the authenticity and accuracy of the evidence and summarising the assessment decisions. A blank Witness Testimony and a completed Witness Testimony, taken from the Teachers Guide, is attached.

Where students evidence is to be produced through simulated role plays, examples of situations that could be used are attached. An Observation Statement or Assessment Checklist must be completed for each situation for each candidate. This must give details of the type of customer, the situation and students performance. An example of an Assessment Checklist, taken from the Teachers Guide is attached.

Students must also deal with a complaint. A complaint letter from a customer, together with information in the duty log, is attached.

Observation Statement

Unit: Customer Service in Leisure and Tourism

Activity: Assessing Ways of Dealing with Complaints

Candidate Name: *[Insert student Name]*

Date: *[Insert Date of Activity]*

Situation

Candidate attended a meeting to discuss the ways the organisation deals with complaints. I adopted the role of Quality Manager in their selected organisation.

Candidate Performance

Assessment of the ways the organisation deals with complaints

[Insert summary of students' performance indicating the extent to which their discussions:

- *applied to the organisation*
- *were*
 - *descriptive*
 - *accurate*
 - *valid*
 - *relevant*
 - *detailed*
 - *consistently clearly presented*
- *made an assessment*
- *needed prompting by the 'Quality Manager'*

Supporting Evidence

[Insert details of any supporting evidence the candidate used to assist their involvement in the discussion eg flipchart, notes, PowerPoint etc. Attach supporting evidence to the Observation Statement]

Assessment

[Insert summary of overall performance as related to mark band descriptors.]

Signed

Date

MYSTERY SHOPPER CHECKLIST

TYPE OF ORGANISATION: LEISURE CENTRE

Service Standard		Y	N	Comments
Appearance				
Lighting	All working, welcoming			
Fascia				
Doors				
Staff	Clean, tidy, uniform, name badge			
Health, Safety and Hygiene				
Notices				
Toilets	Clean, hygiene regularly checked			
Fire Exits				
Floors	Clean, no spillages or wet surfaces, no loosed carpeting			

Communication				
Rapport				
Greeting	Eye contact, smile			
Body Language				
Personality	Friendly, helpful			
Information and Advice				
Signage	Clear			
Displays	Up-to-date, eye catching, informative			
Staff				
Information sheets				

Completed by:

Date:

Time

3 Any Street
Anytown
AN2 3AN

Date

Gray Leisure
44 Milton Lane
Anytown
AN1 4DG

Dear Sir

I wish to make a complaint regarding my visit to your leisure centre on Thursday evening.

I arrived after a hard days work, looking forward to a relaxing swim and sauna. When I was in the changing rooms I realised I didn't have the change for the locker. The receptionist told me she only had two pound coins so couldn't change a £5 note. I had to leave my things on the bench.

After my swim, I got back to the changing rooms and found my mobile phone was missing. When I got dressed I complained to the receptionist. I then had to explain it all to the Duty Manager. All I got from him was 'your membership clearly says we are not liable for belongings'.

I am disgusted that you don't have the service where I can get the change to use the lockers. I don't see why I should have to pay for a new mobile phone just because you couldn't change a £5 note.

I told the Duty Manager that I was going to complain and I expect you to pay for a new mobile phone for me.

I look forward to hearing from you.

Yours faithfully

Guy Derry

GRAY LEISURE DUTY LOG

Time	Action
18.35	Securicor collected takings for the day
19.15	Mr Derry complained that he had his mobile phone stolen from the changing rooms. He had not placed his belongings in a locker. I pointed out that it is clearly stated in our policy that the company cannot be held responsible for personal belongings whilst on the premises. Unfortunately, Mr Derry was not happy when he left and said he would be writing to complain.
21.10	Mrs Davies slipped in the shower as someone had removed the rubber mat for cleaning purposes. Also entered into the Accident Book.

Task b MB1/2/3**TABLE 1**

TABLE TO ASSESS HOW WELL THE ORGANISATION MEETS CUSTOMER NEEDS

Name of organisation:

Types of customer	How effective is the organisation at meeting customer needs
Individuals	
Groups	
People of different ages	
People from different cultures	
Non-English speakers	
People with specific needs, eg sight, hearing impairment	
Business men and women	

Date completed:

METHODS OF COMMUNICATION USED BY STAFF

Method of communication ¹	How is it used?	Assessment	
		What is good about it?	What is bad about it?

¹Telephone, email, mobile phone, face to face, memo

Quality Department Meeting

Agenda

Date

1. Apologies for absence
2. Minutes of previous meeting
3. Complaint 1
4. Complaint 2
5. AOB
6. Date of next meeting

Quality Department Meeting

Agenda

Date

1. Apologies for absence
2. Minutes of previous meeting
3. Complaint 1
4. Complaint 2
5. Complaint 3
6. AOB
7. Date of next meeting

Quality Department Meeting

Agenda

Date

1. Apologies for absence
2. Minutes of previous meeting
3. Complaint 1
4. Complaint 2
5. Complaint 3
6. Complaint 4
7. Complaint Procedure
8. AOB
9. Date of next meeting

Task d) MB1/2/3

Customer Service Scenario 1

A prospective customer comes into your gym and wants to discuss the different types of membership appropriate to him so that he can work out the best scheme for his needs.

Preparation

Ensure you have researched and have details about

- Peak & off-peak memberships
- Any discounts for employees of certain businesses in the area
- Family, couple or single memberships
- Any special offers such as non join up fee during this particular month

Documentation

Ensure you have a Membership Application form and Membership Enquiry Form.

Customer Service Scenario 2

You are a holiday rep for a well known tour operator in a resort in Spain. A family approaches you when on hotel duty. They are planning to spend a day touring the area and want your advice. They don't want to go on an organised excursion as they want to arrange this independently.

Preparation

- what sort of transportation can you offer him eg car hire, bus and train times
- how many are going on this day & what their ages and needs might be
- suitable types of venues that might appeal to the him and his party

Documentation

Ensure you have booking forms for car hire, trains and buses, entrance to attractions and a receipt booklet

Customer Service Scenario 3

You work as a volunteer for a National Trust site. Your job is to take groups around and explain the different exhibits. You are approached by an elderly lady with hearing difficulties who needs additional help to get the most from her visit.

Preparation

- make sure you have information about the site, including a plan of the facility and details of the main exhibits
- consider ways of communicating with the customer
- what resources the facility has to support the customer

Customer Service Scenario 4

You work for Easyjet as a check in agent. You have to check in:

- a business woman flying to Barcelona who approaches you while speaking on her mobile phone
- a family consisting of a grandmother, mother and three children aged 5, 8 and 3. It is the first time the children have flown and the grandmother is a nervous flyer.

Preparation

- consider the information you will need to give to each customer
- make sure you have a plan of the airport so that you can give directions if required
- consider the needs of the customer