



**CAREER CLUSTER**  
Hospitality and Tourism

**INSTRUCTIONAL AREA**  
Customer Relations/Emotional Intelligence

## **PRINCIPLES OF HOSPITALITY AND TOURISM EVENT**

### **PARTICIPANT INSTRUCTIONS**

#### **PROCEDURES**

1. The event will be presented to you through your reading of these instructions, including the Performance Indicators and Event Situation. You will have up to 10 minutes to review this information to determine how you will handle the role-play situation and demonstrate the performance indicators of this event. During the preparation period, you may make notes to use during the role-play situation.
2. You will have up to 10 minutes to role-play your situation with a judge (you may have more than one judge).
3. You will be evaluated on how well you meet the performance indicators of this event.
4. Turn in all your notes and event materials when you have completed the role-play.

#### **PERFORMANCE INDICATORS**

1. Explain the nature of positive customer relations
2. Demonstrate a customer-service mindset
3. Handle customer/client complaints
4. Show empathy for others

## **BUSINESS SITUATION**

You are to assume the role of a SALES REPRESENTATIVE for TRAVEL AMERICA, a local travel company that specializes in group trips across the continental United States. When checking your voicemail messages today you received a very concerning message from Pat Smith (Judge) regarding the final pricing for their upcoming trip to New York City.

Your company has worked with Pat Smith for the past 16 years helping him/her plan a yearly trip to New York City for seniors in his/her marketing program. The trip consists of a five day/four-night stay in Manhattan. Your company has typically taken care of all expenses including hotel, ground transportation, 2 Broadway shows, meals and all local tours/entry fees.

During a meeting, last summer when the trip was being planned a budget of \$1,200 per person was set up based on current pricing and the 50-people signed up for the trip. Due to increased airfare prices, the final cost per person came in at \$1,250. Pat Smith is upset and left a message for you to meet in their classroom today to discuss the trip and the fact that the final bill came in \$2,500 over budget (50 travelers X \$50) which he/she is refusing to pay. Pat wants you to make up the difference from your fees. You came up with the following three options for today's meeting.

Option #1: Drop one of the two Broadway shows from the itinerary. The savings is \$100 per person.

Option #2: Cut the last night off of the trip and make it a four-day/three-night trip. The savings would be \$60 per person for one less night in the hotel.

Option #3: Travel by coach bus to New York versus flying. Total savings would be \$200 per person

Your job is to recommend one of the three options to Pat Smith. Make sure that you support your recommendation based on its impact to the group. Important things to consider are costs, time, and overall impact to the trip.

The presentation will take place in Pat Smith's classroom. Pat will begin the conversation by greeting you and asking to hear your recommendation. Following your presentation, Pat will ask you to respond to additional questions. After you have provided your recommendation and have answered Pat's questions, Pat will conclude the conversation by thanking you for your presentation.

## **JUDGE'S INSTRUCTIONS**

### **DIRECTIONS, PROCEDURES AND JUDGE'S ROLE**

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. Performance Indicators
3. Interview Situation
4. Judge Situation Characterization  
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form  
Please use a critical and consistent eye in rating each participant.

### **JUDGE SITUATION CHARACTERIZATION**

You are to assume the role of PAT SMITH a MARKETING TEACHER that takes your high school seniors on a yearly trip to New York City. The trip consists of a five day/four-night stay in Manhattan. For the past 16 years, you have worked with Travel America a local travel company that specializes in group trips across the continental United States. Travel America has typically taken care of all expenses including hotel, ground transportation, 2 Broadway shows, meals and all local tours/entry fees.

During a meeting, last summer when the trip was being planned the budget was set at \$1,200 per person based on the 50-people signed up for the trip. This morning you left a voice mail message with your Travel America sales representative (student) requesting to meet in your classroom today to discuss the trip and the fact that the final bill came in \$2,500 over budget (50 travelers X \$50) which you are refusing to pay. You want Travel America to make up the difference from their fees.

The sales representative has come up with the following three options for you.

Option #1: Drop one of the two Broadway shows from the itinerary. The savings is \$100 per person.

Option #2: Cut the last night off of the trip and make it a four-day/three-night trip. The savings would be \$60 per person for one less night in the hotel.

Option #3: Travel by coach bus to New York versus flying. Total savings would be \$200 per person

The sales representative will recommend one of the three options to you and support their recommendation based on its costs, time restrictions and overall impact to the trip

The presentation will take place in your classroom. You will begin the conversation by greeting the sales representative and asking to hear their recommendation. Following their presentation, you will ask the student to respond to additional questions. After they have provided their recommendation and have answered your questions, you will conclude the conversation by thanking you for your presentation.

During the course of the role-play you are to ask the following questions of each participant:

1. What recommendations do you have regarding the use of the \$200 per person savings if we go with Option #3?

*Possible Solutions: Answers will vary, but participants may mention one of the following options.*

- *You could refund each participant \$200*
- *We could look at adding a Broadway show and/or additional tours*
- *Could extend the trip by a day and use the money towards hotel and meals*

2. How would we deal with parent/student concerns if we go with Option #1 or #2?

*Possible Solutions: Answers will vary, but participants may mention one of the following options.*

- *Explain the importance of staying within the budget and not increasing the cost of the trip for participants*
- *Explain that no matter which option we choose with 50 participants not everyone will agree with the decision*

3. Why wasn't your company making up the budget deficit an option?

*Possible Solutions: Answers will vary, but participants may mention one of the following options.*

- *When the original budget was developed we gave you the best pricing structure we could afford, there is no room for additional discounts or refunds*
- *We operate on small mark ups and giving a \$2,500 (\$50 X 50 participants) refund is not financially possible*

## **JUDGE'S EVALUATION INSTRUCTIONS**

### **Evaluation Form Information**

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

### **Performance Indicator Information**

1. **Explain the nature of positive customer relations:** Helping Pat Smith with the budget problem will keep the 16-year relationship going strong. Win/Win for both client and business
2. **Demonstrate a customer-service mindset:** Finding a viable option for the group so they still get to do and see what they want to in New York
3. **Handle customer/client complaints:** In this case it was basically a financial complaint. The customer wants the company to make up the budget shortfall. Coming up with possible solutions to work with is a way to have a win/win outcome
4. **Show empathy for others:** Thinking the situation through from the client's perspective gives the student a clearer picture of the problem. Put yourself in the other person's shoes. How would you feel in this situation?



**PRINCIPLES OF HOSPITALITY AND  
TOURISM, 2018**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM  
DISTRICT EVENT**

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA:**  
Customer Relations/Emotional Intelligence

Did the participant:

		Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>					
1.	Explain the nature of positive customer relations	14-15	16-17	18	
2.	Demonstrate a customer-service mindset	14-15	16-17	18	
3.	Handle customer/client complaints	14-15	16-17	18	
4.	Show empathy for others	14-15	16-17	18	
<b>21<sup>st</sup> CENTURY SKILLS</b>					
5.	Reason effectively and use systems thinking?	4	5-6	7	
6.	Communicate clearly?	4	5-6	7	
7.	Show evidence of creativity?	4	5-6	7	
8.	Overall impression and responses to the judge's questions	4	5-6	7	
<b>TOTAL SCORE</b>					

**Exceeds Expectations**

Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator

**Meets Expectations**

Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89th percentile of business personnel performing this performance indicator

**Below Expectations**

Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69th percentile of business personnel performing this performance indicator