SHORT COURSE / COURSE OUTLINE

Travel Sales, Upselling & Ancillary Services

Build practical skills for everyday travel-industry situations.

Duration	Units	Assessment format
12 learning hours	4	30 questions / 60 minutes

Who this programme is for

Travel agency and tourism customer-facing teams.

Duration and learning approach

The published course duration is a programme-specific learning allocation. The 80/20 TQT rule for levelled qualifications is not applied to this course. Confirm the delivery timetable and assessment arrangements before enrolment.

The learning plan includes reading, demonstrations, practical work and feedback. Time spent reading a page is not the sole measure of learning; keep evidence of completed activities.

Programme information and enrolment

Delivery, evidence and assessment

Online learning

Use the programme materials and practice activities in sequence. Compare your output with the feedback and record the decisions you would revise.

ATP-supported learning

Where delivered through an ATP, agree the timetable, access arrangements, feedback and assessment dates with your provider.

How to use the learning materials

Begin with the unit outcomes. Study the mapped explanations and worked examples, then produce the activity evidence before opening suggested answers. Record the source, calculation or reasoning behind each decision. Revise the output after feedback. A completed reading checklist does not by itself demonstrate that an outcome has been achieved.

Mock and final examinations

Multiple-choice examination: 30 questions, 60 minutes.

Mock examinations are formative practice. Use feedback to revisit the linked units; a mock score does not award a certificate. Final examinations assess the specified knowledge and applied decisions through the configured question format. Practical outputs develop skills that multiple-choice questions alone cannot directly demonstrate. Confirm the available final assessment, supervision, submission and scheduling arrangements in the learner portal or with WTTA/your ATP.

Evidence integrity and support

Use fictional customer details for practice. Identify your sources and distinguish supplied case assumptions from real operating rules. Submit your own work, keep a record of revisions, and request reasonable learning or assessment arrangements through the published learner-support procedures. Current supplier and official requirements take priority over training examples.

WTTA learner policies and support

Unit and duration map

Unit	Learning hours	Mock questions	Final questions
1. Needs-based recommendations	3	3	9
2. Ancillary services	3	5	8
3. Ethical upselling	3	4	8
4. Closing and follow-up	3	3	5

International application

Activities use varied travel, destination and service contexts. Transfer the method rather than copying a fictional price or local assumption. Check geography, seasonality, traveller requirements, supplier conditions and source dates whenever the itinerary changes.

Resource access

Syllabuses are public. The linked teaching materials and practice environments require access to the corresponding programme. Keep the unit and outcome codes below in your learning log so feedback can be traced to the syllabus.

UNIT 1 / 3 HOURS

Needs-based recommendations

Learning outcomes

- U1.1 - Translate the traveller brief into weighted selection criteria.

- U1.2 - Present a justified recommendation with a transparent total price.

Content and scope

Discover needs before recommending

A relevant recommendation begins with the traveller’s priorities, not the agency’s commission.

Build a needs brief that supports selling

Discovery should produce a usable decision brief, not just a friendly conversation.

Compare value and total cost fairly

Like-for-like comparison makes hidden differences visible.

Practical application

Evidence task

Use only these fictional facts, prices, people and rules. This exercise creates no booking, payment, travel permission or formal examination result. One adult needs return flights, one checked bag and a return airport transfer. The firm total budget is USD 250. Dates and arrival times suit all options. The customer values flexibility but will not exceed the budget. Prices include all stated mandatory taxes and fees.

- Write five discovery questions and compare two fictional options for a traveller with a tight budget and essential baggage.

- Create a brief with three essentials, two preferences and one pending question.

- Write a two-option comparison with price, convenience and conditions.

Review criteria

- 2 points: The brief identifies bag and return transfer as required, USD 250 as a firm limit and flexibility as a preference. Award 1 if partly correct and 0 if missing or incorrect.

- 2 points: A totals USD 245; B USD 240, saving USD 5 and leaving USD 10. B with the upgrade is USD 275, USD 25 over budget. Award 1 if partly correct and 0 if missing or incorrect.

- 2 points: The recommendation explains value and future fare differences without calling the upgrade unrestricted free changes. Award 1 if partly correct and 0 if missing or incorrect.

- 2 points: The selected total is USD 240; both declined extras are excluded, and pickup details remain pending. Award 1 if partly correct and 0 if missing or incorrect.

- 2 points: The insurance answer seeks approved terms or an authorised specialist response rather than guessing coverage. Award 1 if partly correct and 0 if missing or incorrect.

- 2 points: Conversion is 12/40 = 30%; accuracy is 10/12 = 83.3% to one decimal, with an assigned baggage-quality correction. Award 1 if partly correct and 0 if missing or incorrect.

Mapped learning resources

Discover needs before recommending

Build a needs brief that supports selling

Compare value and total cost fairly

IATA: travel and tourism learning topics

UNIT 2 / 3 HOURS

Ancillary services

Learning outcomes

- U2.1 - Select ancillary services relevant to an expressed need.

- U2.2 - Explain optional costs and limitations without implying they are compulsory.

Content and scope

Explain ancillary services accurately

An ancillary service is an additional product or service that should solve a genuine travel need.

Build relevant extras into a transparent offer

A useful extra fills a real gap in the travel plan.

Discuss insurance within your role

Helpful advice is accurate about limits and clear about specialist referral.

Practical application

Evidence task

Use only these fictional facts, prices, people and rules. This exercise creates no booking, payment, travel permission or formal examination result. One adult needs return flights, one checked bag and a return airport transfer. The firm total budget is USD 250. Dates and arrival times suit all options. The customer values flexibility but will not exceed the budget. Prices include all stated mandatory taxes and fees.

- Prepare an ancillary checklist for baggage, transfer and insurance.

- Prepare an extra-service check for a bag, seat and transfer.

- Rewrite “Everything is covered” as an accurate referral response.

Review criteria

- 2 points: The brief identifies bag and return transfer as required, USD 250 as a firm limit and flexibility as a preference. Award 1 if partly correct and 0 if missing or incorrect.

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Mapped learning resources

Explain ancillary services accurately

Build relevant extras into a transparent offer

Discuss insurance within your role

IATA: travel and tourism learning topics

UNIT 3 / 3 HOURS

Ethical upselling

Learning outcomes

- U3.1 - Recognise pressure-selling and misleading comparisons.

- U3.2 - Use evidence-based benefits and respect a decision to decline.

Content and scope

Upsell with value, transparency and choice

Ethical upselling explains a relevant, verified benefit and the full extra cost, then respects the decision.

Translate features into verified customer benefits

A feature matters only when it helps the traveller's actual objective.

Handle objections without pressure

An objection is information about the customer's decision, not an obstacle to defeat.

Practical application

Evidence task

Use only these fictional facts, prices, people and rules. This exercise creates no booking, payment, travel permission or formal examination result. One adult needs return flights, one checked bag and a return airport transfer. The firm total budget is USD 250. Dates and arrival times suit all options. The customer values flexibility but will not exceed the budget. Prices include all stated mandatory taxes and fees.

- Rewrite a pushy upgrade offer as a transparent, needs-based recommendation.

- Write a benefit-led offer and a respectful response to rejection.

- Respond to price, uncertainty and relevance objections in three short dialogues.

Review criteria

- 2 points: The brief identifies bag and return transfer as required, USD 250 as a firm limit and flexibility as a preference. Award 1 if partly correct and 0 if missing or incorrect.

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Mapped learning resources

Upsell with value, transparency and choice

Translate features into verified customer benefits

Handle objections without pressure

IATA: travel and tourism learning topics

UNIT 4 / 3 HOURS

Closing and follow-up

Learning outcomes

- U4.1 - Confirm informed acceptance before commitment.

- U4.2 - Plan useful follow-up with an owner, time and consent record.

- U4.3 - Calculate a defined conversion measure and evaluate it alongside recommendation quality.

Content and scope

Close accurately and follow up respectfully

A successful close confirms understanding; it does not simply collect a payment.

Practice workshop: a transparent travel offer

Recommend, explain and close without hiding optional costs or pressuring the traveller.

Close with a complete service summary

The final summary checks understanding before commitment.

Measure conversion without ignoring quality

A sales measure is useful only when its definition and evidence are consistent.

Practical application

Evidence task

Use only these fictional facts, prices, people and rules. This exercise creates no booking, payment, travel permission or formal examination result. One adult needs return flights, one checked bag and a return airport transfer. The firm total budget is USD 250. Dates and arrival times suit all options. The customer values flexibility but will not exceed the budget. Prices include all stated mandatory taxes and fees.

- Draft a closing summary and calculate conversion for 9 bookings from 30 relevant enquiries.

- Prepare the comparison and calculate conversion if 8 of 32 relevant enquiries become confirmed bookings.

- Draft a closing summary for the workshop’s lower-cost option with an approved transfer.

- Calculate 12 from 40 and propose a balanced review with two quality checks.

Review criteria

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Mapped learning resources

Close accurately and follow up respectfully

Practice workshop: a transparent travel offer

Close with a complete service summary

Measure conversion without ignoring quality

IATA: travel and tourism learning topics