

Overview

This standard is about organising and coordinating business travel and accommodation. It includes confirming travel or accommodation requirements and the budget available. You research, organise and agree arrangements for travel and accommodation, making sure they meet organisational and travellers' requirements and are best value for money. You keep accurate records for all aspects of the travel or accommodation arrangements and store this securely in accordance with organisational and legal requirements.

It is for professionals in business administration roles who organise and coordinate business travel and accommodation.

Performance criteria

You must be able to:

1. confirm travel or accommodation requirements with colleagues
2. confirm the budget available for travel or accommodation
3. research the available travel or accommodation to meet requirements
4. contact travellers to check their draft itineraries
5. book the best value travel or accommodation available within the budget
6. obtain foreign currency, travel insurance and visas, if required
7. obtain all documents and information for travel or accommodation to meet the requirements
8. collate all documents and information for travel or accommodation against itineraries
9. maintain records of travel or accommodation that is requests and bookings
10. store confidential information and financial records securely in line with legal and organisational policy and procedures
11. arrange payments for travel or accommodation to meet supplier requirements
12. solve any problems with travel or accommodation arrangements in line with organisational policy and procedures
13. provide itineraries, documents and information to the travellers by the required deadline
14. confirm that itineraries, documents and information meet travellers' requirements
15. respond to travellers' requests for additional information, if required
16. maintain a record of the external services and suppliers used for travel and accommodation
17. evaluate the external services and suppliers used to identify those that provide best value
18. follow the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Knowledge and understanding

You need to know and understand:

1. why it is important to confirm the requirements for travel and accommodation
2. how to confirm the budget available for travel or accommodation and how this varies for different people, functions and levels within an organisation
3. where travel and accommodation budget information is held and how it access it
4. how to organise and support business travel or accommodation to meet different colleague and travellers' expectations
5. the main types of travel or accommodation arrangements that are required
6. the organisational policies and procedures to follow when booking travel and accommodation
7. the sources of information, services and suppliers that are used to make travel or accommodation arrangements
8. how to get best value for money when making travel or accommodation arrangements
9. how to identify if foreign currency, insurance and visas are required and how to obtain these
10. how to keep records of travel or accommodation requests, bookings and financial records
11. the types of travel and accommodation information that are confidential and how to follow current legislation when storing them
12. how to obtain travel and accommodation documents and information to provide them to travellers
13. how to make payment for travel or accommodation using organisational procedures
14. the types of problems that may occur with travel or accommodation arrangements
15. the correct procedures to follow to respond to any problems that occur
16. why it is important to evaluate the travel or accommodation services and suppliers used and record the findings of the evaluation for future use
17. the legal, organisational, codes of practice and policies relevant to your role and the activities being carried out

Skills

1. communicating
 1. confirming
3. decision making
4. evaluating
5. managing time
6. negotiating
7. planning
8. problem solving
9. researching
 1. organising

INSBA017



Organise and coordinate business travel and accommodation

Developed by	Skills CFA
Version Number	1
Date Approved	08 Feb 2021
Indicative Review Date	01 Mar 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAA321, CFABAA322
Relevant Occupations	Administration, Administration and Secretarial Occupations, Business, Business and Related Associate Professionals, Administration and Law
Suite	Business and Administration
Keywords	Business; administration; travel; accommodation
