Hospitality
Marketing/Management

Performance Indicators

Draft Performance Indicators
2001 Delta Epsilon Chi Competitive Events

Performance Indicators for this competitive event are used to define the parameters of the written exam and other activities that are part of the overall competition. These performance indicators are a draft of the final document planned for release in late 2001 for the 2002 events. This draft is the basis of events for the 2001 Delta Epsilon Chi CDC (beginning with state/provincial conferences).

Individual indicators are based on a review of prior MarkED research and on extensive review of available online and print literature—both from industry and education. Over the next year, MarkED will refine the list, edit, and evaluate individual indicators and validate the entire list with the national business community.

For additional information on these Performance Indicators, the National Curriculum Framework, or the National Marketing Education Standards, please visit the MarkED web site at www.mark-ed.org. Questions may be e-mailed to betho@mark-ed.com.
## ECONOMICS

**Basic Concepts**
- Distinguish between economic goods and services
- Explain the concept of economic resources
- Describe the nature of economics and economic activities
- Determine forms of economic utility created by marketing activities
- Explain the principles of supply and demand
- Describe the concept of price

**Economic Systems**
- Explain the types of economic systems
- Determine the relationship between government and business
- Explain the concept of private enterprise
- Identify factors affecting a business’s profit
- Determine factors affecting business risk
- Explain the concept of competition

**Cost-Profit Relationships**
- Explain the concept of productivity
- Analyze the impact of specialization/division of labor on productivity
- Explain the concept of organized labor and business
- Explain the law of diminishing returns

**Economic Indicators/Trends**
- Explain measures used to analyze economic conditions
- Explain the nature of the Consumer Price Index
- Explain the concept of Gross Domestic Product
- Determine the impact of business cycles on business activities
- Describe the nature of current economic problems

**International Concepts**
- Explain the nature of international trade
- Identify the impact of cultural and social environments on world trade
- Evaluate influences on a nation’s ability to trade
COMMUNICATION AND INTERPERSONAL SKILLS

Fundamentals of Communication

- Explain the nature of effective communications
- Apply effective listening skills
- Use proper grammar and vocabulary
- Reinforce service orientation through communication
- Explain the nature of effective verbal communications
- Address people properly
- Handle telephone calls in a businesslike manner
- Persuade others
- Make oral presentations
- Explain the nature of written communications
- Write business letters
  - Write informational messages
  - Prepare confirmation letters
- Write inquiries
- Write persuasive messages
- Prepare simple written reports
- Prepare complex written reports
- Use communications technologies/systems (e.g., e-mail, faxes, voice mail, cell phones, etc.)
  - Transfer telephone calls
  - Answer telephone switchboard
  - Process wake-up calls

Staff Communications

- Follow directions
- Explain the nature of staff communication
  - Explain the use of interdepartmental/company communications
- Give directions for completing job tasks
- Conduct staff meetings

Ethics in Communication

- Respect the privacy of others
- Describe ethical considerations in providing information

Group Working Relationships

- Treat others fairly at work
  - Develop cultural sensitivity
- Foster positive working relationships
- Participate as a team member
COMMUNICATION AND INTERPERSONAL SKILLS

**Customer Relationships**

Explain the nature of positive customer/client relations
Demonstrate a customer-service mindset
- **Greet guests**
- **Issue messages/packages to guests at check-in**
- **Escort guests to room**
- **Handle guest’s luggage**
- **Process lost and found**
- **Deliver amenities to guests**
- **Process deliveries**
- **Pick up and deliver valet service for guest**
- **Sort guest mail**
- **Process maintenance request**

**Explain the concept of gratuities (HR:039)**

Handle customer inquiries (IS:007)
- **Confirm guest’s reservation**
- **Respond to requests for facilities/services/community information**
- **Inform guests/clients of local sites/events**

**Give directions to other locations**
**Maintain waiting list**
Make/Confirm travel arrangements for guest/client
**Provide courtesy transportation**
**Assess customer’s special needs (e.g., children, disabilities, etc.)**
Provide customer service in compliance with ADA
**Arrange local sightseeing tours for guests**

**Explain management’s role in customer relations (IS:008)**

**Dealing with Conflict**

Show empathy for others
Use appropriate assertiveness
Demonstrate problem-solving skills
- **Process room changes**
- **Walk guest to another accommodation**
- **Demonstrate negotiation skills**
Handle difficult customers
Interpret business policies to customers/clients
- **Verify customer’s identification when providing age-restricted products**
Handle customer/client complaints
Handle situations when the customer is at fault
- **Assess customer’s level of intoxication**

**Explain the nature of organizational change**
Describe the nature of organizational conflict
Explain the nature of stress management
### PROFESSIONAL DEVELOPMENT

#### Self-Understanding

- Identify desirable personality traits important to business
- Maintain appropriate personal appearance
- Maintain positive attitude
- Demonstrate interest and enthusiasm
- Demonstrate responsible behavior
- Demonstrate honesty and integrity
- Recognize personal biases and stereotypes
- Demonstrate ethical work habits
- Demonstrate orderly and systematic behavior
- Demonstrate initiative
- Demonstrate self-control
- Demonstrate appropriate creativity

**Describe traits important to the success of employees in the hospitality industry**

#### Self-Development

- Assess personal interests and skills needed for success in business
- Explain the concept of self-esteem
- Use feedback for personal growth
- Adjust to change
- Make decisions
- Set personal goals
- Use time-management principles

#### Career Planning

- Analyze employer expectations in the business environment
- Explain the rights of workers
- Identify sources of career information
- Identify tentative occupational interest
- Explain employment opportunities in marketing
- Explain employment opportunities in business

**Explain employment opportunities in the hospitality industry**

#### Job-Seeking Skills

- Utilize job-search strategies
- Complete a job application
- Interview for a job
- Write a follow-up letter after job interviews
- Write a letter of application
- Prepare a résumé
PROFESSIONAL DEVELOPMENT

Continuing Development

Describe techniques for obtaining work experience (e.g., volunteer activities, internships)
Explain the need for ongoing education as a worker
Explain possible advancement patterns for jobs
Identify skills needed to enhance career progression
Utilize resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, and mentors)

Assess the services provided by professional organizations in the hospitality industry
Use networking techniques for professional growth

BUSINESS, MANAGEMENT, AND ENTREPRENEURSHIP

Business Fundamentals

Explain the role of business in society
Describe the nature of the hospitality industry
Describe the development of the hospitality industry
Explain types of lodging accommodations in the hospitality industry
Describe the nature of the divisions of a hotel’s organizational structure (i.e., rooms division, food and beverage division, marketing and sales division, accounting division, engineering and maintenance division, and security division)
Explain the organization of the front office in hotels
Discuss the organization and structure of a hotel’s food and beverage division
Describe types of business activities
Explain marketing and its importance in a global economy
Describe marketing functions and related activities

Explain the concept of merchandising
Explain the nature and scope of purchasing

Explain company buying/purchasing policies
Explain the nature of the buying process

Determine what to buy
Prepare product specifications (specs) for purchasing food items

Determine quantities to buy
Plan quantities of food items to order (as purchased weight, edible portion weight, yield percentage)

Determine when to buy
Place orders/reorders

Place orders for items on menu
## BUSINESS, MANAGEMENT, AND ENTREPRENEURSHIP

### Business Fundamentals

- Explain the nature of buyer reputation/vendor relationships
- Conduct vendor search
- Choose vendors
- Negotiate contracts with vendors
- Review performance of vendors
- Explain the concept of production
- Explain the concept of accounting
- Summarize and disclose tips
- Post guest records
- Transfer charges between accounts
- Initiate refund process for cancellations
- Process advance payments
- Balance daily posting transactions
- Prepare a night audit report
- Prepare daily revenue report
- Calculate net sales
- Describe the nature of cash flow statements
  - Prepare cash flow statements
- Explain the nature of balance sheets
  - Prepare balance sheets
- Describe the nature of profit-and-loss statements
  - Prepare profit-and-loss statements
- Explain the concept of management
- Describe the nature of business records
  - Maintain log book
  - Maintain updated room status
  - Prepare folios
  - Maintain daily walk-in reservation sheet
  - Complete bank deposits/records
- Describe the nature of budgets
- Describe crucial elements of a quality culture
- Describe the role of management in the achievement of quality
- Explain the nature of managerial ethics
- Explain types of business ownership
- Describe current business trends
- **Describe current issues and trends in the hospitality industry**

### Technological Tools

- Identify ways that technology impacts business
  - Operate electronic key system
  - Operate message alert/waiting system
  - Operate two-way radio
  - Operate Telex terminal
  - Operate central reservation terminal equipment
## BUSINESS, MANAGEMENT, AND ENTREPRENEURSHIP

### Technological Tools

- Operate posting equipment
- Demonstrate basic word-processing skills
- Demonstrate basic presentation software skills
- Demonstrate basic database skills
- Demonstrate basic spreadsheet skills
- Demonstrate basic search skills on the Web

**Explain ways that technology impacts the hospitality industry**

**Use check authorization system**

### Business Risks

- Explain types of business risk
- Identify speculative business risks
- Describe the concept of insurance
  - Obtain insurance coverage
  - Settle insurance losses

**Explain routine security precautions**

- **Explain hotel security considerations**
  - Process requests for guest information
  - Control master keys
  - Issue room keys
  - Issue safe deposit box
  - Access and release safe deposit box

- **Explain procedures for reducing bad check losses**
- **Explain procedures for handling robbery situations**
- **Handle emergency situations in hospitality**
- **Open/Close business facility**
- Develop strategies to protect digital data
- Establish policies/procedures for preventing internal theft
- Develop policies and procedures for preventing vendor theft

- **Develop procedures for safeguarding cash**
- Develop procedures for preventing burglary

- **Develop emergency procedures for a hospitality establishment**

**Follow safety precautions**

- **Clean service and work areas**
  - Practice safe and sanitary handling/disposal of wastes/recyclables
- Explain procedures for handling accidents
- Explain procedures for dealing with workplace threats
- Correct hazardous conditions
- Establish fire-prevention program
- Establish safety policies and procedures

- **Develop policies and procedures for responsible alcohol service and intervention**
- Develop safety policies/procedures to prevent sanitation problems
- Establish pest control program
- Set up waste disposal plan

**Explain the nature of risk management**
BUSINESS, MANAGEMENT, AND ENTREPRENEURSHIP

Business Regulation

Describe legal issues affecting businesses
- Describe the nature of legally binding contracts
- Explain the nature of personnel regulations
- Explain the nature of workplace regulations (including OSHA, ADA)
  - Explain the nature of regulations affecting the hospitality industry
- Explain the nature of trade regulations
- Explain the nature of environmental regulations
- Explain the nature of tax regulations on business
- Explain the nature of businesses' reporting requirements
  - Record and report sales tax

Organizing

Develop project plan
Describe ethics in personnel issues
Plan and organize the work efforts of others
  - Schedule employees
  - Coordinate the preparation of guest rooms
Delegate responsibility for job tasks
Establish standards for job performance
Develop a personnel organizational plan
  - Develop job descriptions
Establish personnel policies
Explain the nature of wage and benefit programs
  - Develop compensation plan

Staffing

Determine hiring needs
  - Establish staffing and service ratios for group events
Recruit new employees
Select new employees
Conduct exit interviews
Dismiss/fire employees
Maintain personnel records

Leading

Orient new employees
  - Orient new employees (management's role)
  - Explain the role of training and human resource development
    - Explain the nature of management/supervisory training
    - Conduct training class/program
BUSINESS, MANAGEMENT, AND ENTREPRENEURSHIP

Leading

Explain the nature of leadership in organizations
Explain ways to build employee morale
Explain the concept of staff motivation
Explain the relationship between communication and employee motivation
Explain the concept of employee participation in decision making
Provide feedback about work efforts
Encourage team building
Handle employee complaints and grievances
Ensure equitable opportunities for employees
Assess employee morale
Assess employee performance
Explain the nature of remedial action

Controlling

Explain the nature of overhead/operating costs
Explain employee's role in expense control
Control use of supplies
Describe the nature of managerial control (control process, types of control, what is controlled)
Identify routine activities for maintaining business facilities and equipment
Plan maintenance program
Negotiate service and maintenance contracts
Negotiate lease or purchase of facility
Explain the nature of operating budgets
Develop company's budget
Use budgets to control operations

**Determine cost-effective operating hours**
Develop expense-control plans
Develop food cost-control plans
Develop and maintain energy conservation program
Analyze cash-flow patterns
Calculate financial ratios
Interpret financial statements

**Determine profitability of menu items**
Analyze the revenue contribution of food service operations to a hotel's profitability

Analyze operating results in relation to budget/industry
Prepare financial statements for audit
### BUSINESS, MANAGEMENT, AND ENTREPRENEURSHIP

#### Planning

- Explain the nature of business plans
- Determine technical assistance needed by business owners
- Develop company objectives (for a strategic business unit)
- Develop strategies to achieve company goals/objectives
- Explain external planning considerations
- Identify assumptions for creating projected cash flow statements
- Identify assumptions for creating projected profit-and-loss statements (for a new business)
- Develop business plan

### DISTRIBUTION

#### Nature and Scope

- Explain the nature and scope of distribution
  - **Explain the concept of place (distribution) in the hospitality industry**
- Explain the nature of channels of distribution
- Describe the use of technology in the distribution function
- Explain legal considerations in distribution
- Describe ethical considerations in distribution

#### Order Fulfillment

- Explain the relationship between customer service and distribution
- Prepare invoices
- Use an information system for order fulfillment

#### Warehousing/Stock Handling

- Explain the receiving process
  - **Explain stock-handling techniques used in receiving deliveries**
  - Determine processing priorities
  - Check incoming stock
    - Inspect food deliveries
  - Reconcile shipping/receiving discrepancies
  - File claims for lost/damaged goods
  - Process returned/damaged product
  - Process returns to vendors
  - Establish receiving schedules
- Explain storing considerations
  - Maintain supplies, condiments, etc.
  - Stock server line and stand
## DISTRIBUTION

### Topic
DISTRIBUTION

### Performance Indicators
**Warehousing/Stock Handling**
- Store food products to prevent contamination and spoilage
- Store kitchen utensils
- Select appropriate storage equipment
- Plan storage space

Explain the nature of warehousing
Explain shipping processes

### Topic
Inventory Control

### Performance Indicators
**Maintain inventory levels**
- Stock brochure racks
- Issue and retrieve special items such as irons, cribs, or roll-away beds

Complete inventory counts
- Prepare guest key inventory
- Organize inventory counts

Explain the nature of inventory control systems
- Calculate inventory shrinkage
- Establish food and beverage requisition procedures

### Topic
Management of Distribution

### Performance Indicators
Coordinate distribution with other marketing activities
Explain the nature of channel-member relationships
Explain the nature of channel strategies
Select channels of distribution
Evaluate channel members

## FINANCING

### Topic
FINANCING

### Performance Indicators
**Nature and Scope**
- Explain the nature and scope of financing
- Describe the use of technology in the financing function
- Analyze critical banking relationships

### Topic
Extending Credit

### Performance Indicators
- Explain the purposes and importance of credit
  - Run credit check report
  - Collect payment
  - Make critical decisions regarding acceptance of bank cards
FINANCING

Obtaining Business Credit

- Explain the purpose and importance of obtaining credit (business)
- Identify risks associated with obtaining business credit
- Describe sources of financing for businesses
- Explain loan evaluation criteria used by lending institutions
- Determine financing needed for business operations
- Determine financing needed to start a business
- Complete loan application package

MARKETING-INFORMATION MANAGEMENT

Nature and Scope

- Describe the need for marketing information
  - Describe information helpful to retailers in planning
  - Assess marketing-information needs
- Explain the nature and scope of the marketing-information management function
  - Develop marketing-information management system
- Explain the role of ethics in marketing-information management
- Describe the use of technology in the marketing-information management function

Information Gathering

- Identify information monitored for marketing decision making
- Describe sources of secondary data
  - Search the Internet for marketing information
  - Monitor internal records for marketing information
  - Design a group convention profile
  - Collect marketing information from others (e.g., customers, staff, vendors)
  - Conduct an environmental scan to obtain marketing information
  - Assess trading area
  - Explain factors to consider when selecting a store site
  - Conduct location feasibility study
- Explain the nature of marketing research in a marketing-information management system
  - Complete a property analysis
### MARKETING-INFORMATION MANAGEMENT

**Topic: Information Processing**
- Describe techniques for processing marketing information
- Explain the use of databases in organizing marketing data
- Design a database for retrieval of information
- Use database for information analysis
- Interpret descriptive statistics for marketing decision making

**Topic: Information Reporting**
- Write marketing reports
- Present report findings and recommendations

**Topic: Marketing Planning**
- Explain the concept of marketing strategies
- Identify considerations in implementing international marketing strategies
- Explain the concept of market and market identification
- **Describe the nature of target marketing in the hospitality industry**
- Select target market
- **Determine potential lodging markets**
- Explain the nature of marketing plans
- Explain the role of situational analysis in the marketing-planning process
- Conduct SWOT analysis for use in marketing planning process
- Explain the nature of sales forecasts
- Forecast sales
- **Forecast servings of each food item**
- **Forecast reservations**
- Develop marketing plan
- Describe measures used to control marketing planning
- Evaluate performance of marketing plan
- Conduct marketing audits

### PRICING

**Topic: Nature and Scope**
- Explain the nature and scope of the pricing function
  - **Explain the concept of price in the hospitality industry**
- Describe the role of business ethics in pricing
- Explain the use of technology in the pricing function
- Explain legal considerations for pricing
PRICING

Determining Prices

- Explain factors affecting pricing decisions
- Select approach for setting a base price (cost, demand, competition)
- Determine cost of product (breakeven, ROI, markup)
- Calculate break-even point
- Identify strategies for pricing new products (for imitative new products, for innovative new products)
- Select product-mix pricing strategies (product line, option-product, captive-product, by-product, product bundle)
- Determine discounts and allowances that can be used to adjust base prices
- Use psychological pricing to adjust base prices
- Select promotional pricing strategies used to adjust base prices
- Determine geographic pricing strategies to adjust base prices
- Identify segmented pricing strategies that can be used to adjust base prices

Set prices
Adjust prices to maximize profitability

PRODUCT/SERVICE MANAGEMENT

Nature and Scope

- Explain the nature and scope of the product/service management function
- Identify the impact of product life cycles on marketing decisions
- Describe the use of technology in the product/service management function
- Explain business ethics in product/service management

Quality Assurances

- Describe the uses of grades and standards in marketing
  - Explain the affect of housekeeping standards on repeat business
  - Identify standards for purchasing fresh food items
  - Maintain restaurant quality control standards
- Explain warranties and guarantees
- Identify consumer protection provisions of appropriate agencies
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<tr>
<th>Topic</th>
<th>PRODUCT/SERVICE MANAGEMENT</th>
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<td><strong>Product Mix</strong></td>
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<td>Explain the concept of product in the hospitality industry</td>
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<td>Describe services offered by the hospitality industry</td>
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<td>Explain the nature of function space set-ups</td>
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<td>Explain the concept of product mix</td>
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<td><strong>Explain the nature of product extensions in the hospitality industry</strong></td>
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<td>Describe the nature of product bundling</td>
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<td>Plan product mix</td>
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<td><strong>Select menu items</strong></td>
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<td>Determine services to provide customers</td>
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<td><strong>Plan variety of guest activities</strong></td>
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<td><strong>Select guest service options for establishment</strong></td>
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<tr>
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<th>Positioning</th>
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<td>Describe factors used by marketers to position products/businesses</td>
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<td>Explain the nature of branding</td>
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<td>Explain the role of customer service in positioning/image</td>
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<td><strong>Monitor guest satisfaction with services/facility</strong></td>
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<td>Develop strategies to position product/business</td>
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<td><strong>Explain environmental factors conducive to customer satisfaction</strong></td>
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<td>Determine space requirements and allocation</td>
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<td>Design store’s layout</td>
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<td>Create desired atmosphere</td>
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<td>Evaluate hotel properties</td>
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<th>Retail Product Considerations</th>
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<td>Explain the nature of merchandising plans (budgets)</td>
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<td>Plan stock</td>
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<td>Plan reductions</td>
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<td>Plan purchases</td>
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<td>Plan gross margin</td>
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<td><strong>Prepare merchandising plans (budgets)</strong></td>
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<td><strong>Nature and Scope</strong></td>
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<td></td>
<td>Explain the communication process used in promotion</td>
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<td>Explain the role of promotion as a marketing function</td>
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<td>Explain the types of promotion</td>
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<td><strong>Describe the concept of promotion in the hospitality industry</strong></td>
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<td>Identify the elements of the promotional mix</td>
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## PROMOTION

### Nature and Scope

- Describe the use of business ethics in promotion
- Describe the use of technology in the promotion function
- Describe the regulation of promotion

### Advertising

- Explain the types of advertising media
- Explain components of advertisements
  - Write promotional messages that appeal to targeted markets
- Explain the nature of direct advertising strategies
  - Describe considerations in using databases in advertising
- Create web site
  - Develop web site design/components
- Calculate media costs
- Select advertising media
  - Buy advertisements
- Evaluate effectiveness of advertising

### Publicity/Public Relations

- Write a news release
- Obtain publicity
- Analyze costs/benefits of company participation in community activities
- Develop a public relations plan

### Sales Promotion

- Prepare store/department for special event
  - Explain promotional methods used by hotels/motels
  - Implement creative display techniques and theme options for banquet service
- Dismantle/Store displays/display fixtures/forms
- Post events and information
- Create promotional signs
- Develop a sales packet for a hospitality industry
- Design frequency marketing program
- Analyze use of specialty promotions
- Develop a sales promotion plan

### Management of Promotion

- Explain the nature of a promotional plan
  - Coordinate activities in the promotional mix
  - Use past advertisements to aid in promotional planning
  - Prepare promotional budget
### PROMOTION

**Management of Promotion**

- Manage promotional allowances
- Explain the use of advertising agencies
- Develop an advertising campaign
- Develop promotional plan for a business

### SELLING

**Nature and Scope**

- Explain the nature and scope of the selling function
- Explain the role of customer service as a component of selling relationships
  - Explain key factors in building a clientele
- Explain company selling policies
- Explain business ethics in selling
  - **Describe the rights of customers in the hospitality industry**
- Describe the use of technology in the selling function
- Describe the nature of selling regulations

**Product Knowledge**

- Acquire product information for use in selling
  - Analyze product information to identify product features and benefits

### Process and Techniques

- Explain the selling process
  - Prepare for the sales presentation
  - Establish relationship with client/customer
  - Address needs of individual personalities
- Determine customer/client needs
  - Identify customer’s buying motives for use in selling
  - **Explain factors that motivate people to choose a hospitality site**
- Facilitate customer buying decisions
- Differentiate between consumer and organizational buying behavior
- Assess customer/client needs
- Recommend specific product
  - **Take customers’ food order**
  - Demonstrate product
  - Prescribe solution to customer needs
    - **Recommend hospitality services**
    - **Conduct walk-through for on-site tour**
**SELLING**

**Process and Techniques**

- Convert customer/client objections into selling points
- Close the sale
  - **Ask for booking**
- Demonstrate suggestion selling
  - **Upsell property features to guests**
- Sell good/service/idea to individuals
  - **Make hospitality reservation for customer/client**
  - **Register guests/clients**
- Sell good/service/idea to groups
  - **Process group arrivals**
- Plan follow-up strategies for use in selling
  - **Change/Cancel customer’s reservation**

**Support Activities**

- Calculate miscellaneous charges
  - **Process complimentary offers and coupons/discounts**
- **Process cash sales**
- **Process travelers checks**
- **Assist with currency exchange**
- **Process credit sales**
  - **Verify customer’s credit at check-in**
- **Accept checks from customers**
- **Cash guest/client checks**
- **Operate register/terminal**
- **Prepare cash drawers/banks**
- **Maintain appropriate cash level**
- **Maintain petty-cash fund**
- **Open/Close register/terminal**
- **Process special orders**
  - **Process special food requests**
  - **Arrange special services for customers**
- **Sell gift certificates**
- **Process telephone orders**
- **Process advance room reservations**
- **Prepare for day’s arrivals**
  - **Block rooms for arriving guests**
- **Perform bucket (room rack) check and resolve discrepancies**
- **Process guest checkout**
  - **Process group checkout**
- **Process sales documentation**
- **Prospect for customers**
  - **Write sales letters**
- **Create a presentation software package to support sales presentation**
SELLING

Management of Selling Activities

Coordinate selling effort with other departments
Plan strategies for meeting sales quotas
Analyze sales reports
  Maintain catering sales records
  Analyze food and beverage sales income report
  Analyze restaurant sales (average check, seat turnover, sales per square foot)
  Analyze room sales/occupancy rates
Explain the nature of sales management
Explain the nature of sales training
Analyze technology for use in the sales function