

TOUR/DRIVER GUIDES MODULE 7: PREPARATIONS, TEAMWORK & BUDGETING

INTRODUCTION

In this module the participants will learn how to execute trips professionally, as the focus will be on preparations, teamwork while on a trip, as well as budgeting and receipt handling.

OVERVIEW



Learning Goals



Knowledge

- The participants will learn about things to take into consideration when developing an itinerary and how to prepare well for a trip.



Attitude

- The participants will realize that good preparation is key in any trip.



Skills

- The participants will learn how to build itineraries and to prepare well for a trip.

SESSION 7A: Preparation & Planning

SESSION 7B: Teamwork & Multitasking

SESSION 7C: Budgeting & Receipt Handling

BEFORE YOU START, YOU NEED...

- Flipcharts
- Large paper
- Marker and pens
- Sticky notes
- Items for Marshmallow Challenge:
 - Spaghetti
 - Masking tape
 - Rope
 - Marshmallows



SESSION 7A: Preparation & Planning

AGENDA



Exercise:
Important Aspects of
an Itinerary
(30 min)



Lecture:
Developing a Trip
(30 min)



Exercise:
Your Preparation
(30 min)

INSTRUCTIONS

Exercise: Important Aspects of an Itinerary (30 min)



Explain:

Most trips would have been meticulously planned by the Tour Operator you are working with/for. Therefore, this module goes into details as to what you, as a Tour Guide, needs to do to be able to prepare effectively for an up-coming trip as well as understanding how trips are made.

Professionalism for a trip starts at home before the clients arrive. There has been extensive planning and preparation from the Tour Operator and therefore you need to continue this service once the clients are on the ground.

Instructions:

1. Divide in groups of 3. Each group will receive a specific inquiry.
2. Put yourself in the position of a Safari Department. Look through the client inquiries and pick out the top requirements of their trip. Take 5 minutes to do so.
3. What are the main points to consider from each inquiry?
4. Afterwards, a representative from each team presents their findings. Ask if anyone found any other hidden points that wasn't picked up



**INQUIRY 1 -
LAURA & JACQUES**

We are planning our Honeymoon to Uganda and really want a special and romantic experience. We want to see the gorillas and the chimpanzees as well as doing a safari. This will be a once in a lifetime trip for us, so we are wanting to stay in nice lodges and have some private dinners. We would also love to visit some community projects if possible. We look forward to hearing from you!

**INQUIRY 2 -
MARIA AND DAVID**

I am looking for a trip to Uganda from 15-26 Dec for my husband and myself. We are triathletes and love wildlife, nature, hiking, mountaineering and running. We don't mind camping or being in simple accommodation for a few days but we also like to combine that with a few luxurious nights in a nice hotel or lodge. We would also like to see the gorillas. I am also thinking of taking out children for the first part of the trip. They are two boys of 7 and 9 years old. We would have to drop them back to the airport after 5-7 days and then we continue. I look forward to hearing from you

**INQUIRY 3 -
THEO**

Hello, I am an experienced birder and therefore want to travel to Uganda to see some rare bird species. I have seen a lot of Africa so a safari is not the main reason for my visit, however I would like to see the gorillas. I would like to stay in mid-range accommodation, but since I am travelling solo, it would be nice if the guide could join me for dinner some evenings for some company and to talk more about the birds here in Uganda.

**INQUIRY 4 -
RACHEL AND DANIEL**

We are travelling from America to come see the gorillas! We have been wanting to see the gorillas for years and finally have the time to do so. We would like to spend as much time with them as possible, however we do have one small issue – which I hope won't become a big issue. My husband Dan uses a wheelchair and therefore we will need to stay in lodges/hotels that can cater to this. Also, with the gorilla trekking we will need your advice on how he can do this. We look forward to hearing from you. I am not worried about the budget as long as we can stay in places that are suitable for my husband.

**INQUIRY 5 -
JULIUS AND FAMILY**

We are a Ugandan family wanting to see more of our country. We have already visited Murchison Falls and Jinja, but we would like to go somewhere where we can see wildlife and relax. We only have 5 days as I must go back to work. Can you recommend where we can go in 5 days? Our children are 3, 6 & 12 so we will need rooms where we can all share.



INQUIRY 6 -
THOMAS TOURS

I am a Travel Agent operating out of the Netherlands. I have a group of 8 people (4 couples) that are visiting Uganda from the 20th December to the 2nd January. They will trek the gorillas and the chimps. One of the couples will be celebrating their 40th wedding anniversary on the trip so we will have to organise something special for them. The budget for the trip is \$11,000-\$15,000 so we will need to look at accommodation that will cater to that but that is still of good standards.



Lecture: Developing a Trip (30 min)

SAY:

It would be fantastic if all clients had unlimited budgets when coming on a safari, however that is not realistic, especially after covid-19. People are travelling with a more conscious mind – both financially and in what they expect from a trip. Therefore, it is very important to really look at the client's budget and work around that to ensure they are going to book with you.

Explain that, in order to get a trip price for a client, you must consider several factors:

- 1. What type of accommodation are they going to be staying in?*
- 2. What activities are they going to be doing?*
- 3. Are you hiring a freelance driver/vehicle?*
- 4. How many days is their trip?*
- 5. How many people will be on the trip?*
- 6. Do they need any extras?*
- 7. Commission for the Destination Management Company (DMC)*

However, to be able to get most of this information you must contact the necessary service providers and departments. Planning a trip is not a one-man-band. It takes many different people to make a trip happen and to happen successfully.

ASK:

Who else helps in putting together a trip?

SAY:

E.g. Finance Department, Accommodation Providers, etc

You, as tour guides, are one of those puzzle pieces that make a trip successful. Therefore, it is also your responsibility as a guide to be prepared for the arrival of the guests and to have assisted in the planning of an itinerary.

You may think “how do I help in planning an itinerary?”

You are the key puzzle piece as you will be the one hosting the clients once they get here. So first, the Tour Operator needs to find out if you are available for the trip. You must carefully plan your working schedules to ensure that you give yourself enough time in between trips before the next one.



Exercise: Your Preparation (30 min)



? ASK:

The following questions to the group:

1. *What do you, as a guide, need to prepare before a trip?*
2. *Do you start a trip without any preparation?*

! SAY:

Create a timeline - 1 week --> 1 day before a Trip Using post-it-notes, have the participants write down key preparational activities before the arrival of the guests and place them on the timeline

- *Reading up on the Client (names, ages, dietary requirements, etc)*
- *Ensuring you have everything you need (fuel money, chimp permits, gorilla permits, accommodation proof of payments, activity itinerary, etc)*
- *Ensuring you have all necessary emergency contacts*
- *Calling ahead to the lodges to book Guides Accommodation (if not already organised)*
- *Calling ahead to the lodges to book any Special Activities/Requests/Celebrations*
- *Checking the vehicle and undergoing a service (Module 8)*
- *Prepare yourself (physical appearance/presentation)*
- *Ensure you have the necessary equipment (binoculars, bird books, camera, first aid kit)*
- *Ensure you know the trip program most especially the arrival time of the guests.*
- *Ensure that you are on time to pick up the guests*
- *Make sure you are dressed appropriately and you have prepared appropriate attire for the entire trip*
- *Make sure your car is clean both on the floor, seat pockets and behind the seats is free of rubbish*
- *Ensure that you have drinking water in the vehicle*
- *Make sure you have enough fuel until you reach the next scheduled fuel stop.*
- *Ensure that there is a first aid box in the car*



SESSION 7B: Teamwork & Multitasking

Learning Goals



Knowledge

- Participants learn which skills are necessary for successfully collaborating and multitasking.



Attitude

- Participants become more attentive towards the need to work together.



Skills

- Participants practise skills such as problem solving, collaborating, decision-making and communicating.

AGENDA



Exercise:
Crocodile River
(30 min)



Exercise:
Marshmallow Challenge
(30 min)



Scenarios:
Multitasking
(20 min)

INSTRUCTIONS

Exercise: Crocodile River (30 min)



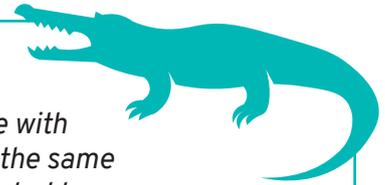
FACILITATOR'S TIP:

Being able to constructively consult with each other is key for collaboration! That is why the participants work in groups of five to six people with the following fictional story. The aim is to arrive at a joint outcome that everyone can live with through good consultation and listening to each other.

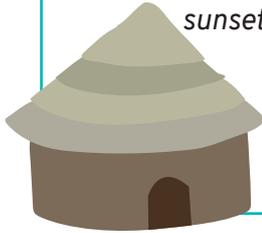
1. Read the story about the crocodile river (following next).
2. Rank the five characters, starting with the person whose behavior you find most objectionable and lastly the person whose behavior you find least objectionable. Also briefly write down the reason.



The Story of the Crocodile River



Once upon a time there was a woman named Andrea. Andrea was in love with Mike. Mike lived on the edge of a river. Andrea lived on the other side of the same river. The river between the two lovers was full of crocodiles. Andrea wanted to cross the river to be with Mike. Unfortunately, the bridge over the river had been swept away during a flood the week before. She asked Sinbad, captain of a ship, if he could take her across. He said he would if she would sleep with him beforehand. Andrea refused and she went to her friend Ivan to explain the problem to him. Ivan wanted nothing to do with it. Andrea saw no option but to accept Sinbad's terms. Sinbad kept his promise and brought Andrea to Mike. When Andrea told Mike what she had done to cross the river, Mike didn't want to hear from her anymore. Andrea felt deeply unhappy and rejected and she went to Stefan with her accident story. Stefan felt sorry for her, went to see Mike and beat him up. Andrea was happy that Mike got what he deserved. At sunset everyone heard how Andrea laughed at Mike.



Let the participants try to reach a consensus on the appropriate rank, which means going through everything until they agree that the chosen rank is the best you can agree on.

Exercise: Marshmallow Challenge (30 min)



FACILITATOR'S TIP:

The Marshmallow Challenge is a simple game that teaches valuable lessons about creativity, innovation and teamwork. The idea is to split up in small groups that will build a free-standing structure tower with a marshmallow on top. Whoever is able to place their marshmallow highest after 18 minutes will win the game.

Instructions:

1. Divide the group in small teams of 3-5 people. Make sure each team has (roughly) the same size. (In case anyone has ever played this game before, ask him/her to not join, as it will spoil the fun. Give this person a role of observer or assistant instead.)
2. Give each team 20 spaghetti sticks, 1 yard (= +/- 90 cm) of string, 1 yard of masking tape, 1 marshmallow and access to scissors.
3. They will get exactly 18 minutes to build the tallest free-standing structure, using only the gears that have been provided. They should place the marshmallow on top. At the end of the 18 minutes, you will measure whose marshmallow is placed highest. At that point, the structure should stand on its own, so no help is allowed in terms of making sure it does not collapse.
4. Any team disobeying the rules is disqualified. Make sure everyone understands the rules
5. Start the game. Walk around the room and observe the progress. Encourage the teams if needed. Audibly countdown the time at specific intervals. You can call when it's halfway through (9 minutes), 5 minutes, 3 minutes, a minute, and a final 15 seconds countdown.
6. After 18 minutes, measure the height of the marshmallow from the bottom of the structure. Call out the heights as you measure. Find the winner and make sure the whole group applauds for them.



7. Facilitate a reflective session by asking members of each group to explain how they experienced it. Ask some to reflect on the strategy they chose, some on how they worked together on a team and others on how it felt when their structure collapsed or when they ran out of time.
8. After that, share some general observations you made.
9. Mention that the Marshmallow Challenge is a famous exercise that thousands of people from all over the world have participated in, ranging from small children to CEOs of big companies.
10. Generally, children tend to be better at this than adults. Why? Because adults often tend to spend too much time overthinking and agreeing on the right approach. Children, however, tend to experiment from the start: they will test things out and learn from these experiences. They will find out that marshmallows tend to be too heavy for the spaghetti sticks and will come up with alternatives, whereas adults often assume it will be ok and will stick to their ideas. After they find out that their assumptions are incorrect, they will run out of time.
11. Afterwards, make the link with their work as a tour/driver guide. How are the lessons they have learned reflected in their work? Which skills are important to work well with your manager, other guides and even your participants from your tour? After all, you can only make a tour a success together!
12. Write the most important skills on a large sheet of paper and use these skills as a basis for the next assignment. Skills that are important: listening to each other, communicating clearly, giving feedback, taking responsibility and initiative, decision-making and conflict management.



Scenarios: Multitasking (20 min)



The last assignment from this training continues on the previous one. When multitasking it is also important to communicate clearly, to take responsibility, to listen well, to make decisions and sometimes to be able to deal with conflicts well.

In the following cases various things come up that participants have to deal with as a tour guide. Read the case out loud and have each person write their own answers to the following questions:

? ASK:

1. What has the highest priority for you and why?
2. What skills are required of you as a guide in this situation?

Scenario 1: Jinja Drive

During a tour in Jinja, a lot happens within a short period of time. In the car to Jinja you are first called by your manager that you have forgotten how many people are going on next week's tour. You don't know this by heart, so you have to look this up. During your manager's call, two tourists in your tour group get into an argument about whether or not the window should be open. You just hang up with your manager and notice that the car is making a weird noise. It eventually turns out that you can't go any further and you are standing outside the car with the whole tour group, while it is still about 30 kilometers to Jinja. Meanwhile, the two quarrelling tourists still have not stopped, and they are now quarrelling about what needs to be done to arrive in Jinja.



Scenario 2: The Delayed Suitcase

You are about to start a 2-week trip in the West of the country. Your clients consist of a family of six: two parents and their three young children and the grandmother. It turns out that the suitcase of both the grandmother and one of the children did not arrive. At the airport they say that it will probably arrive somewhere next week, but they don't look too sure. On the way to Lake Mburo it turns out that grandma's medicines are in the delayed suitcase. Also the favourite toy of one of the boys is missing and he starts to make a scene. One of the other children is nauseous and needs to throw up. Due to all the drama it turns out you have left your wallet in the shop of the petrol station, 20 km before. What do you do?



Scenario 3: Food Poisoning

You have seen it all before: clients not being used to local chicken and falling sick the next day. However, this time not only one of the clients falls sick: you feel bad as well! You have just arrived in a remote area and your own health situation starts to deteriorate quickly. You don't have any energy, have an enormous headache and feel like throwing up. In the meantime the ill client starts complaining. What do you do?



In short, everything that asks a lot of a guide happens in a short time. Continue with the two questions above and then have a group discussion about the answers.



SESSION 7C: Budgeting & Receipt Handling

Learning Goals



Knowledge

- The participants will have a basic understanding of financial management during trips



Attitude

- The participants will take care of financial management



Skills

- The participants are able to set up budgets and deal with receipts and payment vouchers correctly.

AGENDA



Lecture: Introduction into Financial Management
(20 min)



Exercise: Budgeting
(45 min)



Lecture: Receipt Handling
(15 min)

INSTRUCTIONS

Lecture: Introduction into Financial Management (20 min)



Explain.



ASK:

- 1) Ask the group split up in small groups of 2 to 3 people and discuss the following questions: How would they describe financial management? What does it entail? Why is it important? Do they like it? Who is the one in charge of it at their company?



ASK:

- 2) Ask the group if there are any specific things they would like to learn when it comes to financial management and write them down on a flipchart. Make sure to try and answer most of them throughout the day, or if you are unable to answer questions yourself: make sure to help the participants to find the answer.



 **Explain:**

3) *Financial management includes bookkeeping, projections, financial statements and financing which forms the foundation for reaching any organization's goals through sound business decisions.*

 **Explain:**

4) *Financial management is the way to know if the business is making a profit. Financial management helps the business to decide what it can afford in terms of store or office location, inventory purchases, employees, and equipment. You need sound financial information to set your prices and select your vendors. Financial management gives you the tools to plan for overall business growth, for diversification of your product lines, or for reaching new markets. Financial management helps you decide which products, services, and markets are profitable. Effective financial management gives you tools to chart your course into the future, adjust your direction when needed, and help you find your way through challenging times.*

 **Explain:**

5) *If the business' growth requires financing (loans), financial management provides the information to know how much you can afford to borrow for your business. Financial management gives you not only the documentation needed for a loan application, but also helps you discuss your business circumstances with a lender in terms that improve your ability to qualify for the loan.*

Exercise: Budgeting (45min)



Instructions:

 **SAY:**

During a trip you will often have to budget your expenses. How to go about this differs from company to company.

 **SAY:**

Creating a budget is the first place to start with your financial management practice. A budget is a financial plan that details the projections on Incomes and expenditures on a short or long term basis. A budget is a tool that helps you:

- *Track your expenses*
- *Economize when you need to*

Once you create a budget, use it to compare what you've budgeted with your actual income and expenditures.

Show this sample budget list, which covers most typical business budget lines. If any of the budget lines are unclear, elaborate on them.

Please note that many of these expenditures may have been paid by the tour operator at forehand, or will be paid through invoice. Nevertheless, it is still worthwhile to be familiar with these budget lines.



Category	Budgeted	Actual Expenditure
Incomes		
Income source 1		
Total Income		
Expenditures		
Petrol		
Car mechanics		
Accommodation		
Food		
Activity budget		
Airtime, etc.		
Unforeseen costs		
Total Expenditures		
Surplus/(Deficit)		



ASK:

Ask the group to split up in groups of 3 and create a budget for a trip. Provide them the following information:



SAY:

You will be going on a trip for 2 weeks, which follows the highlights of Western Uganda. You will do so with one Supercustom vehicle and 6 clients: two couples, of which one couple has brought their 2 young children. Accommodation has been paid at forehand, but many of the smaller activities have not. You are expected to pay them on the spot, although you have received the budget for it. Petrol is also not yet paid, nor is any meal outside of the lodges.



FACILITATOR'S TIP:

Note that the different groups might have very different budgets depending on the choices they made. Ask the groups to explain how they went about it.

Finally, explain that many tourism companies limit the use of cash as this is generally considered safer. For example, bank cards or mobile money may be used for small expenses, prepaid petrol cards may be used at petrol stations and accommodation is often paid through invoice. Explain these practices if necessary.



Lecture: Receipt Handling (15 min)



Explain:

Explain that handling receipts correctly is important for bookkeeping. Bookkeeping is the organized process of tracking all income and expense transactions. Bookkeeping is a critical component of financial management and it is crucial to follow the procedures of a company correctly.

SAY:

Explain that without proper receipts, a company is not likely to refund any expenses. That is why it is important to store the original receipts safely. Also, make sure to make pictures of any receipt immediately after receiving it, and to store it online.

A Sales Receipt should have the following items;

- Name and Company details
- Title of the document - "Sales Receipt"
- Date
- Customer Name/Details
- Type of Service offered
- Amount paid and method of payment (Cash).

Sometimes you may make payments for which you won't receive a receipt, such as expenses on the market, boda-bodas or tips. In such cases you can use a Payment Voucher, as these are used to record such expenditures. In this case, you use a template and fill in the details yourself. If possible, let it be signed. Look out for these critical items:

- Name and Company Details
- Title of Document (Payment Voucher)
- Date
- All expenses with Unit Price, Units and Amount fields
- Total Amount
- Signature by both parties.

