WORKSHEET 3.5

# Following One Event Through

*Subchapter 3.5 · case in the book: Budapest*

When your sales team promises a client something beyond the hotel's standard, on which document does that promise reach the kitchen, the bar and the accounts office? And has your internal audit ever followed a single event through all of those documents, from the first proposal to the last email?

This worksheet turns the tools of the subchapter into a form you can fill in. The texts come from the book; the empty columns are for your own property. Adapt it before use: an unadapted checklist is exactly what the book warns against.

## Practical application: what to do in your property

| Step (from the book) | Done? | What we found / owner |
|---|---|---|
| A line for contractual promises: Tóth added a line headed "Contractual commitments" to the banquet event order. Sales fills it in at handover, and every commitment carries the name of the person who delivers it. | | |
| Contracts that list: The contract template no longer attaches the proposal as a whole. Each sustainability commitment is listed individually, with what the client will receive afterwards and when. | | |
| Rule and promise reconciled: The terrace received three hundred unbreakable reusable cups, so that the safety rule and the promise no longer conflict. Before any outdoor reception, the bar checks the commitments line, not only the house rule. | | |
| Evidence before confirmation: Szabó wrote to the client the next day: reusable ware at dinner, not at the reception; the cause lay in a hotel process that was being changed. She enclosed the weighed food waste and the week's waste figures, as far as they could be attributed. Confirmations to clients now go out only after banqueting has supplied the evidence, and promised evidence travels with the invoice. | | |

These steps are the book's method, not requirements of ISO 20121. Evidence can take whatever form suits the property; a separate document is needed only where an applicable requirement, or the property's own system, makes it necessary.

## Verification Pact: what is believed, tested against the standard

| What is commonly believed | What actually holds | Our position |
|---|---|---|
| Internal audits must be organised by department | No. The audit programme sets the methods (9.2.2); the standard requires processes and their interactions (4.4) | |
| What a proposal says is a sales matter, not an audit subject | No. Interested-party requirements the hotel takes up belong to the system (4.2); communication must not mislead (7.4) | |

| What is commonly believed | What actually holds | Our position |
|---|---|---|
| Every process needs a written procedure | No. Formalisation is possible, not mandatory (4.4, note); documented information to the extent necessary (8.1) | |
| The internal audit checks conformity with the standard | Only partially true. Also the organisation's own requirements (9.2.1 a) and effective implementation (9.2.1 b) | |
| An event's cycle ends when the guests leave | No. It runs to the post-event phase (3.8) | |
| ISO 19011 requires process audits | No. It is guidance; the hotel chooses its methods (9.2.2) | |

## Common mistakes: a self-check

| Mistake (from the book) | Present here? | Action / owner |
|---|---|---|
| Auditing by organisation chart, so that every department passes and the gaps between them are never examined. | | |
| Leaving proposals out of the audit, although that is where the hotel tells clients what it will do. | | |
| Attaching the whole proposal to the contract, so that everything becomes binding and nothing is listed. | | |
| Stopping when the guests leave, when invoicing and follow-up are the last handovers. | | |
| Reading only forward along the documents, and never backward along the cost centre and delivery notes. | | |
| Attributing a finding to a person, when each person was right by their own document. | | |
| Treating a house rule as untouchable without checking it against the promises it overrides. | | |
| Confirming to a client from memory rather than from evidence. | | |

## Operative synthesis

- **Does our internal audit follow at least one event a year from proposal to follow-up?: Only a traced event shows whether the system is effectively implemented (9.2.1 b)**
- **Does every contract list sustainability commitments individually?: A proposal attached as a whole makes everything binding and lists nothing**
- **Does every contractual commitment have a field and a named person on the banquet event order?: A criterion absent from the working document controls nothing (8.1)**
- **Has anyone compared house rules with commitments?: A sensible rule can silently defeat a promise**
- **Does promised evidence reach the client with or soon after the invoice?: A post-event promise belongs to no department unless someone is named**

- **Does sales check with banqueting before confirming anything to a client?: A confirmation from memory can mislead (7.4)**
- **Act on immediately. Take the last large event with a sustainability promise and write each promise on its own line. Next to each, find the working document where it appears and the person who delivered it.**
- **Plan for. Write process audits into the audit programme, chosen by risk, and give the banquet event order a line for contractual commitments with a named person for each.**
- **Monitor going forward. Track, event by event, how many promises arrive at every station and how many confirmations to clients rest on evidence. Those two numbers show whether the handovers are holding.**

## Action plan for our property

| Action | Owner | Due | How we will know it worked |
|---|---|---|---|
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Source: Francesco Dore, The Helm and the Lens, Volume 8b «The Lens», subchapter 3.5. Edizioni Effedore, 2026. Clause references are paraphrased; this sheet does not reproduce the text of ISO 20121, ISO 19011 or ISO/IEC 17021-1. It is not legal advice: the law that applies is that of the place where the property operates.