



Australian Government

Department of Education, Employment and Workplace Relations

PRMCL25B Provide quotation for cleaning services

Release: 1

PRMCL25B Provide quotation for cleaning services

Modification History

Not Applicable

Unit Descriptor

Unit descriptor

This unit of competency covers the skills and knowledge required to calculate the cost of services accurately and to present quotations to clients. The unit also covers responding to a client request to variations to specifications.

The unit requires the ability to assess the client's requirements, calculate the costs of the service options and provide the client with a quotation detailing proposed service, its cost and conditions. A comprehensive knowledge and understanding of the range of cleaning methods available and the associated utilisation of equipment and chemicals as well as the company's quoting policies and procedures is essential to perform this task.

Application of the Unit

Not Applicable

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Not Applicable

Elements and Performance Criteria Pre-Content

Not Applicable

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

1 Calculate costs of services	<p>1.1 Create <i>client record</i> to administer the client's details and requirements in accordance with <i>company requirements</i></p> <p>1.2 Source, select and interpret product and costing information in accordance with <i>company requirements</i></p> <p>1.3 Calculate costs, taxes and profit margin in accordance with <i>company requirements</i></p> <p>1.4 Check all calculations and keep detailed and legible records of method of calculations in accordance with <i>company requirements</i></p>
2 Provide quotation to client	<p>2.1 Ensure all quotations include accurate details of the cost of service and the <i>conditions and limitations of quotation</i> in accordance with <i>legislative and company requirements</i></p> <p>2.2 Provide quotations to client in company format in accordance with <i>company requirements</i></p> <p>2.3 Offer options, with secondary quotations, in accordance with <i>company requirements</i></p> <p>2.4 Record all details of the quotation accurately and legibly and retain on file in accordance with <i>company requirements</i></p>
3 Respond to request for variation of existing contract	<p>3.1 Determine the <i>appropriate person</i> with authority to respond to client request for a <i>variation</i> in accordance with <i>company requirements</i></p> <hr/> <p>3.2 Assess request against existing contract conditions, the additional work required and the capacity to respond in accordance with <i>company requirements</i></p> <p>3.3 Prepare accurate costing and provide quotation for requested changes in accordance with <i>company requirements</i></p> <p>3.4 Update <i>client record</i> and record all details of the quotation in accordance with <i>company guidelines</i></p>

Required Skills and Knowledge

Refer to Evidence Guide

Evidence Guide

EVIDENCE GUIDE

The evidence guide identifies the requirements to be demonstrated to confirm competence for this unit. Assessment must confirm sufficient ability to use appropriate skills and knowledge to provide a quotation or respond to a variation request. Assessment of performance should be over a period of time covering all categories within the range statement that are applicable in the working environment.

Critical aspects of competency

- Assessing the client's service requirements.
- Understanding the resource implications of the particular cleaning methods being proposed.
- Assessing the equipment, chemical and consumable requirements of the work order.
- Calculating costs of providing services.
- Compliance with company and legislative requirements.
- Implementing company policies and procedures for preparation of quotation.
- Outcomes achieved in relation to customer service and company requirements for preparing and presenting quotations.
- Presenting service offer, costing and conditions.

Knowledge needed to achieve the performance criteria

Knowledge and understanding are essential to apply this unit in the workplace, to transfer the skills to other contexts and to deal with unplanned events. The knowledge requirements for this unit are listed below.

- Client specifications.
- Effective and compatible cleaning methods for various surface types.
- Types of cleaning equipment and their appropriate uses.
- Types of chemicals and their appropriate uses.
- Product knowledge.
- Knowledge of job specification for variation requests.
- Contractual requirements for variation requests.
- Relevant industrial awards and other industrial agreements.
- Relevant consumer protection issues and fair trading and trade practices requirements.
- Awareness of applicable legislation, regulations, codes of practice and industry advisory standards.
- Communication and negotiation techniques.
- Company management structure and reporting procedures.
- Company procedures and practices.
- Emergency response and evacuation procedures.
- Injury, dangerous occurrence and incident reporting.
- Knowledge of biological and viral control procedures.
- OHS legislation and procedures.
- Routes of entry and potential symptoms of exposure from chemicals.

Specific skills needed to achieve the performance criteria

To achieve the performance criteria, some complementary skills are required. These are:

- preparation of concise and accurate written quotations and associated business correspondence

- reading existing contracts and site plans
- performing the mathematical calculations required for the preparation of quotations on the cost of services or service variations and planning and allocating resources data sheets
- communicating clearly and concisely using written and verbal modes
- customer service
- handling and disposal of chemicals safely
- handling and disposal of contaminated and toxic waste
- performing the mathematical calculations required for the dilution and mixing of chemicals as specified on product labels
- planning and organising work
- problem solving and critical analysis
- reading, interpreting and responding appropriately to directions and safety instructions in equipment manuals and material safety data sheets and on chemical labels
- requesting advice or further information
- scheduling and rostering
- seeking and receiving feedback
- sourcing, organising and recording information
- working as part of a team.

Resources required to assess this unit

The following resources should be available:

- access to company policy documents and procedures for preparing and documenting quotations
- access to relevant databases and information sources
- access to plain English version of relevant statutes and procedures
- work order instructions, work plans and schedules
- assessment instruments, including personal planner and assessment record book.

Gaining evidence to assess this unit

For valid and reliable assessment of this unit, the competency should be demonstrated over a period of time and be observed by the assessor.

The competency is to be demonstrated in a range of situations that may include customer/workplace interruptions and involvement in related activities normally experienced in the workplace.

Assessment of competency may be made through practical demonstrations in the work environment. Consistency of outcomes over a period of time should be the basis for assessing practical job requirements. A further option for off-the-job assessment may be by way of a work-related project supplemented by supervisor reports.

Key competency levels

There are a number of processes that are learnt throughout work and life that are required in all jobs. They are fundamental processes and generally transferable to other work functions. Some of these are covered by the key competencies, although others may be added.

Information below highlights how these processes are applied in this unit of competency.

- | | | |
|------------------------------|---|---|
| 1 Perform the process | 2 Perform and administer the process | 3 Perform, administer and design the process |
|------------------------------|---|---|

How can communication of ideas and information be applied?	2	Source appropriate product, equipment specifications and costing information relevant to the particular quoting situation.
How can information be collected, analysed and organised ?	2	Collect and analyse information from client's tender brief and develop service option(s) for the client.
How are activities planned and organised ?	2	Plan and organise work to ensure client's quotation deadline is met and prioritise order of quotations to be provided to various customers.
How can teamwork be applied?	2	Acquire information from management and client to support quotation and meet deadlines.
How can the use of mathematical ideas and techniques be applied?	2	Calculate the costs of services to clients including cost of equipment, chemicals and other products required.
How can problem-solving skills be applied?	2	Communicate with management and client to gain information to resolve problems.
How can the use of technology be applied?	2	Record data for future use such as quotations and stock/equipment control.

Range Statement

RANGE STATEMENT

The range statement links the required knowledge and organisational and technical requirements to the workplace context. It describes any contextual variables that will be used or encountered when applying the competency in work situations. It allows for different work practices and work and knowledge requirements as well as for differences between organisations and workplaces. The following variables are listed in alphabetical order and may be present for this particular unit.

Appropriate person(s) may include:

- manager
- self
- supervisor.

Client records may be a computer or manual file and include:

- contact details
- customer files and databases
- details of previous quotations
- details of previous service provision
- use of contractors.

Company requirements may include:

- access and equity policy, principles and practice
- business and performance plans
- client communication procedures
- client confidentiality procedures
- client service standards
- communication channels and reporting procedures
- company goals, objectives, plans, systems and processes
- company issued identification badge/card/pass
- company policy and procedures
- company service standards
- defined resource parameters
- dress and presentation requirements
- duty of care, code of conduct, code of ethics
- emergency response and evacuation procedures
- maintenance procedures for equipment and PPE
- OHS control procedures (e.g. health and safety plans, job plans, job safety analysis, risk assessments, safe operating practices/procedures, safe work instructions, work method statements, safe system of work statements)
- OHS policies and procedures
- personnel practices and guidelines
- policies and procedures relating to own role, responsibility and delegation
- quality and continuous improvement processes and standards
- records and information systems and processes
- rights and responsibilities of employees and employers
- training (induction, refresher and new skills) materials
- use of contractors
- work site access security clearance procedures.

Conditions and limitations of quotations may include:

- date of quotation
- general conditions and rules
- inclusions and exclusions
- life/expiry date of quotation
- payment details
- rise and fall of costs.

Legislative requirements may include:

- Australian Standards, quality assurance and certification requirements
- award and enterprise agreements
- codes of practice
- national industry standards
- relevant Commonwealth/state/territory legislation and local government regulations that affect company operation:
 - anti-discrimination and diversity
 - availability of chemical registers/manifests
 - chemical controls
 - consumer protection

- environmental protection issues
- equal employment opportunity
- freedom of information
- industrial equipment certificates of competency or licences
- industrial relations
- OHS Acts and regulations
- privacy
- trade practices
- workplace consultative arrangements.

Variation requests may occur due to:

- change in the level of the client's business
- contractor initiated
- emergencies
- irregular requirements (shampoo carpet, window cleaning)
- new building work.

Work order information may include:

- access to work site and egress points
- budget allocations
- completion times/dates
- insufficient people to complete the work task(s)
- job requirements and tasks
- legislative requirements and local government
- OHS requirements and emergency response procedures
- resource requirements - equipment and chemicals
- specific client requirements e.g. relationships with other activities, dress and presentation requirements
- use of signage and barriers
- work schedules
- working in isolated and remote locations
- work site contact person(s).
-

Unit Sector(s)

Not Applicable

Functional Area:

Functional Area: Core. Cleaning Operations