



Australian Government

Department of Education, Employment and Workplace Relations

## PRSTS317A Provide estimate and quote

Release: 1

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### **Modification History**

Not applicable.

### **Unit Descriptor**

This competency standard covers the process of providing an estimate and quote on security systems to clients. It requires the ability to identify the needs of clients and prepare an accurate quote which provides full details of security equipment and system provisions. Competency also requires a knowledge of interpreting plans, designs and specifications and calculating labour and material costs. These work functions would be carried out under routine supervision within organisational guidelines.

**Functional Area:** Elective, Technical Security

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**Functional Area:** Elective, Technical Security

### **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

### Elements and Performance Criteria

Element	Performance Criteria
1 Identify customer needs	<ul style="list-style-type: none"><li>1.1 Security assessment is undertaken in accordance with organisational requirements to determine client requirements</li><li>1.2 Specialised system requirements of clients are identified and installation requirements are considered in accordance with legislative and organisational requirements</li><li>1.3 Occupational Health and Safety standards, statutory requirements, Australian Standards, manufacturers specifications and organisational requirements are interpreted</li><li>1.4 Appropriate plans, drawings and texts are interpreted in order to identify correct size, type and quantity of material and equipment for estimation</li><li>1.5 Ability to provide client security system is assessed in accordance with client security requirements and organisational and legal requirements</li></ul>
2 Estimate costs	<ul style="list-style-type: none"><li>2.1 Organisation's rate schedules and / or industry based labour rates and conditions are identified and applied to establish costings according to organisational policy and procedures</li><li>2.2 Where equipment or materials are to be obtained from a supplier, quotations are obtained to ensure fair comparisons between suppliers</li><li>2.3 Equipment, materials and other relevant items availability and delivery dates are confirmed with supplier, where required</li><li>2.4 Site inspection is carried out to identify installation method and possible problems are considered and allowances for contingencies are made based on findings</li><li>2.5 Costs estimated plan to return a profit on provision of security systems to client requirements where</li></ul>

- appropriate
- 3 Document and confirm quotation with client
- 3.1 Quotation is prepared providing clear and concise information including all details of security system to be provided in accordance with organisational requirements
  - 3.2 Quotation is presented promptly to client which reflects client security requirements according to organisational requirements and accepted timeframes
  - 3.3 Client is consulted and any changes or variations are negotiated to meet client and organisational requirements
  - 3.4 Client file is created and required documentation is accurately updated to include all relevant details in accordance with organisational policy and procedures

## Required Skills and Knowledge

Not applicable.

## 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 an estimate and quote on security systems. Assessment of performance should be over a period of time covering all categories within the Range of Variables statements that are applicable in the learning environment.

### **What critical aspects are required for evidence of competency?**

Determine security equipment requirements for provision of security system.

Determine prices and estimates for labour, equipment, materials and other relevant items.

Determine availability of equipment/materials.

Calculate estimations to return a profit where appropriate.

Ensure estimates allow for provision of security system which meets client requirements.

Prepare accurate quotes for clients which provide full details of security equipment/system provision.

### **What specific knowledge is needed to achieve the performance criteria?**

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

legislation and regulations applicable to quoting and providing security equipment/system services

organisational policies and procedures (personal presentation, documentation procedures, records and information systems)

types and functions of security equipment and systems

requirements of company pricing including schedules, policy and procedures

computer applications in relation to costing

contractual requirements for estimating and quoting for service provision

principles of duty of care, code of conduct and code of ethics

organisational policies and procedures related to the analysis of client requirements and selection of services

rights and responsibilities of customers.

### **What specific skills are needed to achieve the performance criteria?**

To achieve the performance criteria, some specific skills are required. These include the ability to:

accurately record and report information

present a professional image to members of the public and colleagues

apply active listening and questioning techniques

handle customer complaints courteously

communicate effectively with and relate to people from different social, cultural and ethnic backgrounds and of varying physical and mental abilities

calculate time, measurements and quantities

operate a computer

read and interpret plans, designs and specifications

organise work utilising time management skills

comply with relevant legislative and regulatory requirements.

### **What resources may be required for assessment?**

Access to a suitable venue and access to designs and specifications, unit prices of equipment, materials and labour to make an estimate.

Case studies.

Occupational Health and Safety guidelines.

Assessment instruments, including personal planner and assessment record book.

Access to a registered provider of assessment services.

**What is required to achieve consistency of performance?**

For valid and reliable assessment of this unit, the competency should be demonstrated over a period of time and observed by the assessor. The competency is to be demonstrated in a range of situations, which may include involvement in related activities normally experienced in the workplace.

Evidence of underpinning knowledge understanding of processes and principles can be gained through thorough questioning and by observation of previous work.

**Assessment against this unit may involve the following:**

Continuous assessment in a setting that simulates the conditions of performance described in the elements, performance criteria and range of variables statement that make up the unit.

Continuous assessment in the workplace, taking into account the range of variables affecting performance.

Self-assessment on the same terms as those described above.

Simulated assessment or critical incident assessment, provided that the critical incident involves assessment against performance criteria and an evaluation of underpinning knowledge and skill required to achieve the required performance outcomes.

**Key competency levels**

There are a number of processes that are learnt throughout work and life which 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 competency standard.

**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)**

Information and ideas with regard to developing an understanding of client expectations and requirements may be shared and discussed with colleagues, supervisor and/or clients.

**How can information be collected, analysed and organised? (2)**

Occupational Health and Safety standards, quality assurance requirements, manufacturers specifications and organisational policy and procedures may be accessed to ensure compliance.

**How are activities planned and organised? (2)**

Work tasks may be prioritised and coordinated or sequenced as required to ensure availability of materials and meet agreed completion dates.

**How can team work be applied? (2)**

Assistance may be provided among team members to carry out and fulfil quotation requirements.

**How can the use of mathematical ideas and techniques be applied? (2)**

Mathematics may be applied as an aid to measure and calculate materials and labour.

**How can problem solving skills be applied? (2)**

In the application of skills and knowledge to identify and resolve client complaints or to recognise service delivery complications.

**How can the use of technology be applied? (1)**

To access company pricing schedules and company pro-formas for the preparation of estimates and quotes.

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## Range Statement

The Range of Variables provides information about the context in which the unit of competency is carried out. It allows for different work practices and work and knowledge requirements as well as for differences between organisations and workplaces. The following variables may be present for this particular unit:

**Assessment may involve**

discussions with client  
visual inspections  
review of client floor plans and supporting documentation  
questioning police, insurance companies and other bodies.

**Clients may include:**

property agent  
tenant  
building supervisor  
project manager  
corporations  
general public  
government agencies.

**Specialist system requirements may be:**

use of special tools  
system manuals and documentation  
product training  
software/hardware development.

**Installation requirements may be:**

use of special tools or equipment (e.g. drill, ladder, scaffolding, cherry picker  
sub-contract labour.

**Applicable legislation, codes and national standards may relate to:**

relevant Commonwealth/State/Territory legislation which affect organisational operation:  
Occupational Health and Safety  
environmental issues  
equal employment opportunity  
industrial relations  
anti-discrimination and diversity

licensing arrangements  
Australian Standards, quality assurance and certification requirements  
relevant industry Codes of Practice  
award and enterprise agreements  
trade practices  
privacy requirements.

**Organisational requirements may relate to:**

legal and organisational policy and procedures including personnel practices and guidelines  
organisational goals, objectives, plans, systems and processes  
legislation relevant to the operation, incident and/or response  
employer and employee rights and responsibilities  
business and performance plans  
policies and procedures relating to own role, responsibility and delegation

quality and continuous improvement processes and standards  
client service standards  
defined resource parameters  
Occupational Health and Safety policies, procedures and programs  
emergency and evacuation procedures  
duty of care, code of conduct, code of ethics  
access and equity policy, principles and practice  
records and information systems and processes  
communication channels and reporting procedures.

**Manufacturers specifications may be found in:**

printed instruction leaflets  
operators manuals  
equipment specifications  
attachments to equipment  
plans and diagrams  
warranty documents.

**Security systems may be:**

electronic  
mechanical  
computerised  
procedural.

**Rate schedules may include:**

labour rates  
standard unit costs  
standard equipment costs  
standard materials costs  
standard installation costs  
standard service costs  
standard monitoring costs.

**Possible problems may include:**

insurance  
time penalties  
disputes  
availability  
delivery  
competencies  
restricted site access  
building progress  
weather and environmental conditions  
cash flow.

**Quotations are written and may include:**

company identification information  
results of security assessment  
client brief  
recommended security system and agreed security system  
system capabilities  
system specifications and configuration  
equipment and/or system type

equipment locations and positions  
service and maintenance  
limits of system  
costs, timelines, warranty/guarantee/liability terms and conditions if applicable  
suitable sign-off arrangements by company and client  
terms of trade.

**Changes or variations may include:**

changes and variations in cost, equipment, services  
changes and variations in installation, monitoring  
changes and variations in starting and/or completion dates  
variations of warranty/guarantee/liability terms and conditions  
variations in exclusions and terms of trade.

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variations in exclusions and terms of trade.

## **Unit Sector(s)**

Not applicable.