



Australian Government

SITTTVL005 Prepare customer quotations

Release: 1

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Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to calculate the costs of products and services and to present quotations to customers. It requires the ability to provide quotations for products and services where business pricing has already been determined.

The unit applies to any travel industry organisation and quotations can be for any international or domestic product. The organisation could be a principal (the supplier) or an agent quoting on products and services on behalf of the principal.

It applies to frontline sales or operations personnel who operate with some level of independence and under limited supervision. This includes travel consultants, inbound tour coordinators, reservations sales agents, and owner-operators of small travel organisations.

The skills in this unit of competency must be applied in accordance with Commonwealth and State/Territory legislation, Australian standards and industry codes of practice.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Travel

Unit Sector

Tourism

Elements and Performance Criteria

ELEMENTS

Elements describe the essential outcomes

1. Calculate costs of products and services.

PERFORMANCE CRITERIA

Performance criteria describe the performance needed to demonstrate achievement of the element.

- 1.1. Create client profile to administer customer details and requirements.
- 1.2. Source, select and interpret product and costing information

- to prepare quotation.
- 1.3. Calculate commissions or mark-up net costs according to organisational procedures to determine a profitable selling price.
 - 1.4. Use relevant system to calculate any additional taxes, special fees and other charges.
 - 1.5. Use relevant system to calculate any required currency conversions.
 - 1.6. Check product or service package or itinerary calculation against all individual product and service components.
 - 1.7. Determine final cost of product or service package or itinerary and record on client profile according to organisational procedures.
2. Provide quotations to customer.
 - 2.1. Prepare quotation to reflect required customer inclusions.
 - 2.2. Promptly provide quotation to customer according to organisational procedures and formats.
 - 2.3. Include accurate details of cost of product and service provision, and conditions and limitations of quotation.
 - 2.4. Offer secondary quotations with options, as appropriate.
 - 2.5. Record details of quotation accurately and file according to organisational procedures.
 - 2.6. Minimise use of printed materials and maximise electronic transmission and record keeping to reduce waste.
 3. Update and record quotations.
 - 3.1. Adjust and update quotations to take account of changed requests or arrangements.
 - 3.2. Provide most up-to-date quotation to customer inclusive of current conditions and limitations.
 - 3.3. Record all details of adjusted quotations and file.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS

DESCRIPTION

- | | |
|--------------------|---|
| Reading skills to: | <ul style="list-style-type: none"> • interpret documents, customer files, customer requests and complex product costing information. |
| Writing skills to: | <ul style="list-style-type: none"> • record customer details and requests, complex quotations and all quotation options in a clear format and style, with accurate details of conditions and limitations specifically applicable to the quotation. |

- Oral communication skills to:
- discuss supplier costs and negotiate a mutually agreeable rate.
- Numeracy skills to:
- interpret complex product and costing information and calculate complex costs for all products
 - interpret and calculate any sales and product coordination fees.
- Problem-solving skills to:
- identify and resolve mistakes in calculations.
- Planning and organising skills to:
- prepare quotations in correct customer file sequence according to the earliest service dates for customers.
- Technology skills to:
- use features of electronic databases.

Unit Mapping Information

Supersedes and is equivalent to SITTTSL006 Prepare quotations.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694>