



Australian Government

Department of Education, Employment and Workplace Relations

SFLSOP308A Prepare quotations for floristry products

Revision Number: 1

SFLSOP308A Prepare quotations for floristry products

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to accurately calculate the costs of floristry products and services and to present quotations to customers. It requires the ability to provide quotations for products and services where some business pricing has already been undertaken by the business manager. The following unit covers those skills required by the business manager to price and develop a full floristry product range: • SFLSOP509A Research assess and develop a floristry product range No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.
------------------------	---

Application of the Unit

Application of the unit	This unit describes a key sales and operational function for a diverse range of floristry products and services and applies to the full range of industry sectors and environments. The floristry business could be a retail, studio or online floristry business and the quotation could be face-to face, via electronic means or over the telephone. This unit has particular application to those personnel who sell as a key focus of their job role and for whom quoting is an essential skill. It applies to frontline sales or operations personnel who operate with some level of autonomy or under limited supervision and guidance from others. It is undertaken by a diverse range of people such as retail floristry sales personnel, telephone sales agents, e-business sales personnel, studio florists, floral designers, florists involved in corporate or special events and owner-operators of small floristry businesses.
--------------------------------	--

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	Nil	

Employability Skills Information

Employability skills	This unit contains Employability Skills.
-----------------------------	--

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
---	--

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Source information relative to the costs of products and services.	1.1. Obtain details of specific customer requirements and preferences through discussions with customer and any information supplied 1.2. Create records to administer the customer's details and requirements. 1.3. Source and accurately select and interpret product and costing information required to prepare the quotation. 1.4. If required, negotiate costs with suppliers according to commercial agreements and relationships, and within scope of individual responsibility. 1.5. Confirm availability of supply and identify alternate sources to allow for accurate calculation and supply of costs.
2. Calculate costs of products and services.	2.1. Calculate commissions or mark-up nett costs according to the organisation's procedures and requirements to determine a profitable selling price. 2.2. Accurately calculate any additional taxes, special fees and other charges. 2.3. Accurately calculate any required currency conversions. 2.4. Seek information on competitors' sale price and make reasonable cost adjustments to ensure a price competitive product. 2.5. Accurately calculate the final cost to the customer. 2.6. Check all calculations against all product and service components. 2.7. Keep detailed and legible records of the method of calculation, according to the organisation's format.
3. Provide quotations to customer.	3.1. Prepare the quotation to reflect all inclusions required by the customer. 3.2. Promptly provide accurate quotation to the customer according to the organisation's procedures and format. 3.3. Offer secondary quotations with options, as appropriate. 3.4. Ensure all quotations include accurate details of the cost of product and service provision and the conditions and limitations of the quotation. 3.5. Record all details of the quotation accurately and

ELEMENT	PERFORMANCE CRITERIA
	legibly and keep on file according to the organisation's procedures.
4. Amend quotations and issue invoices	4.1. Adjust and update quotations to take account of changed requests or arrangements 4.2. Provide the most up-to-date quotation to customers inclusive of new conditions and limitations 4.3. Record all details of adjusted quotations and keep on file. 4.4. Prepare and provide initial and ongoing invoices to customers accepting quotations.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- research skills to identify, interpret and sort relevant information including product supply and in-house sales costing information and information on competitors' selling price
- communication skills including active listening and open and closed questioning of colleagues and customers to determine and meet customer preferences and special requirements in order to quote on suitable products and services
- literacy skills to read and comprehend the content of documents such as customer files, sales notes, documents detailing special requests, initial job specifications and sometimes unfamiliar and detailed product information documents including supply cost sheets or manuals and in-house pricing sheets or manuals
- writing skills to create customer files and to document sometimes complex customer requirements, costings and written quotations, including the conditions specifically applicable to the quotation
- numeracy skills to calculate all components, including labour costs, required for the provision of floristry product and services, to interpret the supply cost and to calculate mark-ups and or commissions and final sales cost of products to be supplied.

Required knowledge

- the costs of products and services sold by the organisation or ability to source accurate costs for all components to be included in the quote
- selling price of competitors' key product range and how it compares with the sale price of products and services provided by the organisation
- fees applicable to the floristry industry and the organisation in particular
- negotiated cost of supply, contractual arrangements and preferred supplier arrangements in place
- industry commission and mark-up procedures appropriate to the specific industry sector and those applied by the organisation
- quotation systems and procedures appropriate to the specific industry sector and the particular organisation
- formats, styles for and inclusions of quotations presented by the floristry industry and the organisation in particular, including styles that cater for those with special needs (e.g. presenting information in large print, providing photographs or sketches)
- invoicing inclusions that match the quotation, and procedures for issuance
- the primary components of consumer protection laws that relate to the provision of quotations. These would include the business's responsibility in relation to nominating and charging cancellation fees and price increases, providing refunds; inability to supply products as described and substitution of suitable product

REQUIRED SKILLS AND KNOWLEDGE

components.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- ability to prepare and provide multiple accurate quotations in response to multiple customer requests. These must be prepared over a period of time and cover a diverse range of floristry products and services to ensure consistency of performance and ability to respond to different requirements.
- knowledge of industry and organisational practices that relate to commissions, mark-ups and fees
- knowledge of consumer protection laws
- completion of quotations within commercial time constraints and deadlines determined by the customer and the organisation.

Context of and specific resources for assessment

Assessment must ensure:

- access to a fully equipped office or sales environment using appropriate computers, printers, information programs, publications and software programs currently used in the floristry industry to assist the quotations function
- use of relevant and current product information to support the quotation process, e.g. brochures, price lists and product sales manuals
- use of a full range of operational documentation, e.g. details of supplier contracts, customer files and invoices.

Method of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- evaluation of integrated project or work activities completed by the candidate, including sourcing information on products, selling and designing products
- evaluation of a diverse range of quotations prepared by the candidate including those of differing complexities

EVIDENCE GUIDE

- project or work activities that show the candidate's ability to prepare quotations covering the requirements of differing industry contexts e.g. quotations for retail floristry shops, studio environments, telephone sales environments, e-businesses
- case studies to assess ability to provide accurate quotations in response to particular customer requests or for a series of customer files
- written and oral questioning or interview to test knowledge of the formats for and inclusions of quotations and the consumer protection regulations that would apply
- review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- BSBDES402A Interpret and respond to a design brief
- SFLSOP306A Provide quality service to floristry customers
- SFLSOP307A Sell floristry products.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customer may be:

- business to business customer e.g. retailer to an event co-ordinator
- e-business
- studio
- new
- regular
- retail
- corporate.

Information supplied may include:

- notes, documents or files outlining customer requirements, prepared by self or colleagues through discussions or correspondence with the customer
- customer preferences for:
 - flower and plant materials (common, exotic and Australian wildflowers)
 - colour
 - wrapping
 - baskets
 - decorative pots
 - buckets and decorative pails
 - containers (bowls, vases)
- themes for an event or special occasion
- corporate livery or branding requirements
- purpose of the occasion:
 - wedding
 - funeral
 - corporate function
 - special occasions (Mother's Day, St Valentine's Day).
- various floral components required for an event or special occasion
- number of items required
- proposed size of items

RANGE STATEMENT	
	• budget or price limits of the customer • delivery requirements • requirements for on-site set-up, maintenance, breakdown, and disposal of floristry products for an event or special occasion • date required.
Records may be:	• a computer file • a manual file.
Product and costing information may include:	• internal organisational price lists or manuals including: • pre-priced costs for the organisation's set product range • pre-priced costs for components of a custom- made product • labour • delivery • pre-determined service fees. • supplier price lists, product description sheets or manuals including seasonal availability and differing seasonal costs • supplier information and fee schedule for hire equipment and items.
Quotation:	• may be for a broad range of products and services, including: • a single floristry product • multiple products and services making up a complete range for a special occasion or event • regular provision of floristry products for corporate clients • may be prepared: • manually • using a computer. • may be provided by: • telephone • verbally in a face-to-face context • fax • email or other electronic transmission • mail • internal communication.

RANGE STATEMENT	
<i>Special fees and charges</i> may include:	• service fee • consultation fee • relay fee • hire fee • transaction or credit card fee • loyalty program redemption fee • amendment fee • cancellation fee • reconfirmation fee • courier fee • organisation's delivery fee • special sourcing fee to locate and transport items of special request such as non seasonal flower and plant materials.
Some examples of <i>products and services</i> included in quotations are:	• flowers including: • fresh (common, exotic and Australian wildflowers) • dry and preserved • artificial. • plant materials including: • fresh (common, exotic and Australian foliage) • dry and preserved • artificial • potted plants • fruit and vegetables. • horticulture products • ancillary items and merchandise including: • chocolates, fruit, nuts, alcohol • hampers • gift items of any type • novelties such as balloons and toys • flower preservatives and conditioning agents • presentation materials including: • wrapping • gift cards and message items • incorporation of corporate materials provided by the customer.

RANGE STATEMENT

- services such as:
 - design consultancy
 - event styling
 - relay organisation
 - transportation and delivery
 - labour for management of on-site events or special occasions
 - on-site installation and disposal of floral displays
 - on-site maintenance of all floral displays throughout the life of an event or special occasion.
- large , small or themed corporate displays including components constructed off-site and assembled on-site for:
 - exhibition centres
 - ball rooms
 - restaurants and reception centres
 - theatres
 - galleries
 - hotels
 - government buildings
 - hospitals
 - corporate offices
 - marquees
 - gardens
 - cruise boats
 - churches or chapels.
- floral arrangements for events and special occasions:
 - corporate events
 - balls and banquets
 - themed events
 - industry and other awards presentations
 - theatrical performances
 - trade shows
 - exhibitions
 - floral festivals
 - weddings

RANGE STATEMENT	
	• parties e.g. birthdays and engagements • celebrations e.g. Christmas and St Valentine's Day • religious celebrations e.g. communions, bar mitzvahs • funerals.
<i>Conditions and limitations of the quotation</i> (initial and subsequent) may include:	• inclusions • exclusions • items that are subject to availability • prices subject to change • inclusion of fees, taxes and levies • deposit and payment requirements • payment options including payment plans • date of current quotation • life and expiry date of quotation • changes of conditions of pre-existing quotation or booking • changes to provision of pre-existing booking • legislative requirements such as cooling-off period after acceptance of quotation • methods of customer accepting quotation.

Unit Sector(s)

Unit Sector	Floristry
--------------------	-----------

Competency field

Competency field	Floristry Sales and Operations
-------------------------	--------------------------------

Co-requisite units

Co-requisite units		