



Australian Government

SITTTSL006 Prepare quotations

Release: 1

SITTTSL006 Prepare quotations

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 tourism, travel, hospitality or events industry sector 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, visitor information officers, account managers for professional conference organisers, event coordinators, tour guides, restaurant managers, banquet coordinators or managers, resort activities coordinators, tour desk officers, reservations sales agents, and owner-operators of small tourism organisations.

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

Pre-requisite Unit

Nil

Competency Field

Tourism Sales and Operations

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 records to administer customer details and requirements.

- 1.2.Source, select and interpret product and costing information to prepare quotation.
- 1.3.Negotiate costs with suppliers according to commercial agreements and relationships, and within scope of individual responsibility.
- 1.4.Calculate commissions or mark-up net costs according to organisational procedures to determine a profitable selling price.
- 1.5.Calculate any additional taxes, special fees and other charges.
- 1.6.Calculate any required currency conversions.
- 1.7.Calculate final cost of product or service package or itinerary.
- 1.8.Check product or service package or itinerary calculation against all individual product and service components.
- 1.9.Keep detailed records of method of calculation, according to organisational formats.
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:	interpret documents, customer files, customer requests and complex product costing information.
Writing skills to:	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

SITTTSL304 Prepare quotations

Links

Companion Volume implementation guides are found in VETNet -

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

Assessment Requirements for SITTTSL006 Prepare quotations

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- prepare a quotation covering at least three different tourism, travel, hospitality or event product and service components from the list in the knowledge evidence for at least five different customers with different product and service requirements
- integrate knowledge of commissions and mark-ups and fees into each of the above quotations
- complete activities within commercial time constraints and deadlines determined by the customer and the organisation.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- specific industry sector and organisation:
 - quotation systems and procedures
 - features of products sold
 - sources of costs for products, services and fees
 - sources of negotiated cost of supply, contractual arrangements and preferred supplier arrangements
 - commission and mark-up rates and procedures
 - formats for and inclusions of quotations presented to customers
- conditions and limitations of quotation considerations:
 - changes of conditions of pre-existing quotation or booking
 - changes to provision of pre-existing booking
 - cost of items that are subject to availability
 - date of current quotation
 - exclusions
 - general conditions and rules
 - inclusion of fees, taxes and levies
 - legislative requirements
 - life and expiry date of quotation
 - methods of customer accepting quotation
 - payment requirements

- prices being subject to change
- product and service components of quotations:
 - accommodation
 - activities
 - convention facilities
 - cruises
 - domestic products and services
 - entertainment
 - entrance to attractions or sites
 - food, beverage and catering
 - functions
 - international products and services
 - meals
 - meeting or event equipment
 - speaker services
 - special event consumable items
 - special items with customer's corporate branding
 - technical equipment and services:
 - audio-visual
 - pyrotechnics
 - rigging
 - sound and lighting
 - special effects
 - stage design and construction
 - venue styling
 - tour guiding services
 - tours
 - transfers
 - transportation
 - travel insurance
 - vehicle rental
 - venue hire
- special fees and other charges that apply to customer bookings:
 - amendment fee
 - cancellation fee
 - communication fee
 - courier fee
 - credit card fee
 - itinerary preparation fee
 - loyalty program redemption fee

- product booking fee
- reconfirmation fee
- service fee
- transaction fee
- visa and passport handling fee
- primary components of consumer protection laws that relate to providing quotations and, organisational responsibility for:
 - nominating and charging cancellation fees
 - providing information on potential price increases
 - providing refunds
 - supplying products as described or substituting suitable products when product is unavailable.

Assessment Conditions

Skills must be demonstrated in a tourism, travel, hospitality or events business operation or activity that prepares quotations. This can be:

- an industry workplace
- a simulated industry environment set up for the purposes of assessment.

Assessment must ensure access to:

- computers, information systems and software currently used by the tourism, travel, hospitality and event industries to produce and store quotations and product-related information
- internet and email
- printers and scanners
- storage for computer data
- telephone
- current costing information found within brochures, product manuals, tariffs, price lists, supplier information kits, information databases and computerised reservations systems (CRS)
- operational documentation
- details of supplier contracts and customer files
- current plain English regulatory documents distributed by government consumer protection regulators
- customers with whom the individual can interact; these can be:
 - customers in an industry workplace who are assisted by the individual during the assessment process; or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors; and:

- have worked in industry for at least three years where they have applied the skills and knowledge of this unit of competency.

Links

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