



Australian Government

SITTTVL005 Prepare customer quotations

Release: 1

SITTTVL005 Prepare customer 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 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:	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

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>

Assessment Requirements for SITTTVL005 Prepare customer 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 three quotations, each including at least three different product or service components from the list in the knowledge evidence
- across the above quotations the following product or service components must be included on at least one occasion each:
 - international airfare
 - domestic airfare
 - cruise
 - packaged touring
 - tour land arrangements
- integrate commissions, mark-ups and fees into each of the above quotations
- complete above 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
 - costs and features of products sold
 - sources of costs for products, services and fees
 - commission and mark-up rates and procedures
 - formats for and inclusions of quotations presented to customers
- conditions and limitations of quotation considerations:
 - changes to pre-existing quotation or booking
 - exclusions
 - general conditions, rules and legislative requirements
 - inclusion of fees, taxes and levies
 - expiry date of quotation
 - methods of customer accepting quotation

- payment requirements
- itineraries and prices being subject to change
- product and service components of quotations:
 - accommodation
 - attractions
 - air product
 - cruise product
 - tours
 - transportation
 - travel insurance
 - vehicle rental
- additional fees and other charges that apply to customer bookings
- 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 and future credits
 - supplying products as described or substituting suitable products when product is unavailable.

Assessment Conditions

Skills must be demonstrated in a safe environment, incorporating the use of industry-realistic simulations and scenarios where required.

Assessment must ensure access to:

- computers, information systems and software currently used by the travel industry
- internet
- storage for computer data
- current costing information for travel products and services
- operational documentation
- details of supplier contracts and customer files
- current plain English regulatory documents distributed by government consumer protection regulators
- customers and suppliers with whom the individual can interact. These can be:
 - customers and suppliers 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.

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