



Australian Government

SITXCCS019 Prepare quotations

Release: 1

SITXCCS019 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 type of organisation and quotations can be for any product or service. It applies to frontline sales or operations personnel who operate with some level of independence and under limited supervision.

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

Client and Customer Service

Unit Sector

Cross-Sector

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 customer file to administer customer details and requirements.
- 1.2. Source, select and interpret product or service 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. Calculate any additional taxes, fees or other charges.
 - 1.5. Check product or service package cost calculation against all individual product and service components.
 - 1.6. Determine final cost of product or service package and record on customer file according to organisational procedures.
2. Provide quotations to customer.
 - 2.1. Prepare quotation to reflect customer requirements and provide to customer according to organisational procedures and formats.
 - 2.2. Include accurate details of cost of product and service provision, and conditions and limitations of quotation.
 - 2.3. 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 customer 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 on customer 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 product or service costing information.
Writing skills to:	record customer details and requests and quotations in a clear format and style, with accurate details of conditions and limitations specifically applicable to the quotation.
Numeracy skills to:	- interpret product or service costing information and calculate costs for all products or services - 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 computer systems and software to prepare quotations.

Unit Mapping Information

No equivalent unit.

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 SITXCCS019 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 for three different customers, each including at least three different product or service components
- integrate commissions, mark-ups and fees into each of the above quotations as applicable
- 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:

- for products or services provided by the 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
 - prices being subject to change
- 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.

Assessment must ensure access to:

- computers, information systems and software
- internet
- storage for computer data
- current costing information for products and services
- operational documentation
- details of supplier contracts and customer files
- current plain English regulatory documents distributed by government consumer protection regulators.

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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