



Australian Government

SITTTSL304 Prepare quotations

Release 1

SITTTSL304 Prepare quotations

Modification History

The version details of this endorsed unit of competency set are in the table below. The latest information is at the top.

Version	Comments
1.0	E Replaces and is equivalent to SITTTSL006B Prepare quotations. Prerequisite removed.

Unit Descriptor

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.

Application of the Unit

This unit applies to any tourism, hospitality and event 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 retail travel consultants, corporate 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.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements and Performance Criteria

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.

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|---|---|
| <p>1. Calculate costs of products and services.</p> | <p>1.1 Create <i>records</i> to administer customer details and requirements.</p> <p>1.2 Source, select and interpret product and costing information to prepare the <i>quotation</i>.</p> <p>1.3 Negotiate costs with suppliers according to commercial agreements and relationships, and within scope of individual responsibility.</p> <p>1.4 Calculate commissions or mark up nett costs according to organisational procedures to determine a profitable selling price.</p> <p>1.5 Accurately calculate any additional taxes, <i>special fees and other charges</i>.</p> <p>1.6 Accurately calculate any required currency conversions.</p> <p>1.7 Calculate final cost of the product or service package or itinerary.</p> <p>1.8 Check product or service package or itinerary calculation against all individual <i>product and service components</i>.</p> <p>1.9 Keep detailed records of the method of calculation, according to organisational formats.</p> |
| <p>2. Provide quotations to customer.</p> | <p>2.1 Prepare the quotation to reflect all required customer inclusions.</p> <p>2.2 Promptly provide quotation to the customer according to organisational procedures and formats.</p> <p>2.3 Offer secondary quotations with options, as appropriate.</p> <p>2.4 Include accurate details of the cost of product and service provision and the <i>conditions and limitations of the quotation</i>.</p> <p>2.5 Record all details of the quotation accurately and file according to organisational procedures.</p> <p>2.6 Minimise use of printed materials and maximise electronic transmission and record keeping to reduce waste.</p> |
| <p>3. Update and amend quotations.</p> | <p>3.1 Adjust and update quotations to take account of changed requests or arrangements.</p> <p>3.2 Provide the most up to date quotation to customers inclusive of new conditions and limitations.</p> |

3.3 Record all details of adjusted quotations and file.

Required Skills and Knowledge

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

Required skills

- communication skills to discuss supplier costs and negotiate a rate
- literacy skills to:
 - read and interpret documents such as customer files, customer requests and complex product costing information

write records of customer details and requests, complex quotations and all quotation options in a clear format and style including accurate details of conditions and limitations specifically applicable to the quotation

- numeracy skills to:
 - interpret complex product and costing information and calculate complex costs for all products
 - interpret and calculate commissions or mark-ups
 - interpret and calculate any sales and product coordination fees
 - calculate any currency conversions
 - calculate the final customer cost
- planning and organising skills to prepare quotations in correct customer file sequence according to the earliest service dates for customers
- problem-solving skills to identify and resolve mistakes in calculations.

Required knowledge

- for the 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
- the primary components of consumer protection laws that relate to the provision of quotations including 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 unable.

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 ability to:

- prepare multiple quotations covering a diverse range of tourism, hospitality or event products and services to meet the different requirements of customers
- integrate knowledge of commissions, mark-ups and fees into quotation activities
- demonstrate knowledge of the primary components of consumer protection laws and actions that must be adhered to by organisations
- complete quotations within commercial time constraints and deadlines determined by the customer and the organisation.

Context of and specific resources for assessment

Assessment must ensure use of:

- a real or simulated tourism, hospitality or event business operation or activity which prepares quotations
- a real or simulated tourism, hospitality or events industry environment; for example:
 - a reservations area or call centre
 - a retail shopfront or mobile sales situation for the retail travel sector
 - an office environment as defined in the Assessment Guidelines
- computers, printers and software programs currently used by the tourism hospitality or event industry to prepare quotations
- current costing information found within brochures, product manuals, tariffs, price lists, supplier information kits, information databases and computerised reservations systems (CRS)
- operational documentation, e.g. details of supplier contracts and customer files
- current plain English regulatory documents distributed by government consumer protection regulators.

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:

- projects and activities that allow assessment of the

individual's ability to provide accurate quotations in response to particular customer requests or for a series of customer files

- evaluation of a range of quotations prepared by the individual
- written or oral questioning to assess knowledge of consumer protection laws that relate to the provision of quotations
- review of portfolios of evidence and third-party workplace reports of on-the-job performance by the individual.

Guidance information for assessment

The range of products and services and complexity of quotations will vary. Because of the broad industry application of this unit, it is critical that assessment is contextualised to meet the requirements of the specific industry sector, local industry operations and the particular needs of the job role.

The assessor should design integrated assessment activities to holistically assess this unit with other units relevant to the industry sector, workplace and job role, for example:

- SITHKOP404 Plan catering for events or functions
- SITTTSL303 Sell tourism products and services
- SITTTSL305 Process reservations
- SITTTSL307 Process travel-related documents
- SITTTSL308 Use a computerised reservations or operations system
- SITXEVT401 Plan in-house events or functions.

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.

Records may be:

- a computer file
- a manual file.

A ***quotation*** may be:

- for a broad range of products and services, including:
 - conferences
 - events
 - groups
 - incentive tours
 - inclusive products or optional touring products
 - individuals
 - meetings
 - multiple products and services making up a complete package or itinerary
 - one-off touring arrangements
 - series tours
 - single product or service
- prepared:
 - manually
 - using a computer
- provided by:
 - email or other electronic transmission
 - fax
 - internal communication
 - mail
 - telephone
 - verbally in a face-to-face context.

Special fees and other charges may include:

- amendment fee
- cancellation fee
- communication fee
- courier fee
- credit card fee
- itinerary preparation fee
- loyalty program (e.g. frequent flyer)

Product and service components in quotations may include:

- redemption fee
- product booking fee
- reconfirmation fee
- service fee
- transaction fee
- visa and passport handling fee.
- 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.
- 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

Conditions and limitations of the quotation (initial and subsequent) may include:

- exclusions
- general conditions and rules
- inclusion of fees, taxes and levies
- inclusions
- legislative requirements such as cooling-off period after acceptance of quotation
- life and expiry date of quotation
- methods of customer accepting quotation
- payment requirements
- prices subject to change.

Unit Sector(s)

Tourism

Competency Field

Tourism Sales and Operations