

Competency Standard

UNIT TITLE: PREPARE AND SUBMIT QUOTATIONS		NOMINAL HOURS: 40
UNIT NUMBER: D2.TCS.CL5.20 D2.TTA.CL2.16		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to prepare and forward accurate and comprehensive quotations for products and services to customers.		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Identify the context for the quotation</p> <p>1.1 Identify the focus for <i>quotations</i></p> <p>1.2 Identify the <i>details for the quotation</i></p> <p>Element 2: Prepare the quotation</p> <p>2.1 Establish <i>files to record the quotation</i></p> <p>2.2 <i>Identify appropriate supplier and provider alternatives</i></p> <p>2.3 <i>Calculate costs of products and services required for the quotation</i></p> <p>2.4 Identify <i>terms and conditions</i> that apply to the quotation</p> <p>2.5 <i>Submit draft quotation</i> for approval</p> <p>2.6 <i>Amend draft quotation</i>, as required</p> <p>2.7 Record and file the approved quotation</p>	<p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.</p> <p>This unit applies to all organisations that prepare and submit quotations for products and services to customers or potential customers within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> 1. Travel Agencies 2. Tour Operation <p><i>Quotations</i> may be prepared using manual or electronic/automated systems and can be prepared for:</p> <ul style="list-style-type: none"> • Single or multiple products and services • Groups or individuals • One-off arrangements or a series of arrangements • Tours, trips, travel and transfers • Accommodation, meals and entertainment 	

<p>Element 3: Submit the quotation</p> <p>3.1 Identify the required <i>submission method</i></p> <p>3.2 Provide the quotation</p> <p>3.3 <i>Explain and expand on the quotation</i></p> <p>3.4 <i>Encourage questions</i> from the client</p> <p>3.5 <i>Advise client of action to make booking</i></p> <p>Element 4: Follow-up the quotation</p> <p>4.1 <i>Advise client of any changes</i> that will affect the provided quotation</p> <p>4.2 Provide additional advice and assistance, as requested</p> <p>4.3 <i>Maintain contact with the client</i></p> <p>4.4 <i>Implement actions to close the sale</i></p> <p>4.5 <i>Record changes</i> to, and communications, regarding the quotation</p>	<ul style="list-style-type: none"> • Guiding services • Entry to attractions • Venue and equipment hire • Meetings, events, functions and conferences. <p><i>Details for the quotation</i> may be related to:</p> <ul style="list-style-type: none"> • Name and contact details of the client including details of the traveller where the contact is not the user • Proposed itinerary, including destinations (intermediary and final destinations), services and activities required, attractions to be visited • Accommodation and dining/catering requirements • Budget • Dates and times, including specific days, seasonal imperatives and duration • Customer numbers and classification, including adults, children, babies and groups • Preferred travel options, including destination travel requirements • Reasons for trip, function • Non-negotiable elements that relate to the quotation • Previous history of the client in relation to bookings made. <p><i>Files to record the quotation</i> may include:</p> <ul style="list-style-type: none"> • Paper-based files • Electronic files. <p><i>Identify appropriate supplier and provider alternatives</i> may be related to:</p> <ul style="list-style-type: none"> • Assessing alternatives against the identified requirements for the quotation • Evaluating the alternatives against the given criteria for the quotation • Accommodating host enterprise requirements in relation to the use of preferred suppliers, providers and carriers
--	--

- Aligning with established client preferences and individual client market research data/feedback
- Determine and select suppliers, providers and carriers to be provided as options to the client.

Calculate costs of products and services should include:

- Ensuring comprehensiveness and accuracy of all information provided
- Negotiating costs with suppliers, providers and carriers to obtain optimal prices
- Calculating commissions that apply to the quotation
- Calculating mark-up net costs
- Applying host enterprise procedures to determine selling prices
- Including all relevant and legitimate taxes, fees and other charges to provide a quotation that has no hidden charges
- Incorporating currency conversions into the statement of prices, where applicable
- Factoring allowable discounts
- Considering and including package deals, where appropriate
- Taking into account seasonal and other premiums that may apply to bookings
- Estimations based on current year prices.

Terms and conditions may relate to:

- Terms and methods of payment, including dates for payment of deposits and final payment
- Notifications regarding final confirmation of the booking and, where relevant, numbers
- Cancellations and penalties and charges that apply
- Procedures and charges that apply to name and date changes for the booking
- Guarantees and warranties that apply to the products and services covered by the quotation

- Exclusion and limitation of liability clauses
- Identification of the period for which the quotation is valid
- Whether or not the quotation is subject to change with or without notice
- Reference to associated terms and conditions as imposed by third party providers
- General industry rules, regulations and codes.

Submit draft quotation may include:

- Provision of draft quotation to supervisor, manager or designated internal departments
- Verifying inclusions, exclusions and calculations included in the quotation
- Checking accuracy and comprehensiveness of the quotation
- Ensuring the quotation conforms with internal formatting and presentation requirements
- Checking the legitimacy of the quotation.

Amend draft quotation may include:

- Revising draft quotation on the basis of feedback received and/or errors and omissions identified
- Representing revised draft quotation for approval
- Preparing secondary quotations, as appropriate, to supplement primary quotation as deemed appropriate by the nature and extent of client requirements.

Submission method may include:

- Telephone
- Facsimile
- E-mail
- Mail
- Internal communication to other personnel and/or departments
- In-person presentation to client or group of clients.

Explain and expand on the quotation may include:

- Providing personal interpretation and explanation of the quotation
- Providing supplementary information as required
- Explaining the reasons for charges and fees included in the quotation
- Assisting the client to understand the reputation and expertise of nominated suppliers, providers and carriers
- Providing supporting brochures and marketing materials to assist with understanding of the quotation.

Encourage questions may include:

- Providing opportunity for client to contact the organisation and/or person who prepared the quotation
- Asking client if they have questions
- Being available to respond to questions that are asked
- Providing accurate and comprehensive responses to questions that are asked.

Advise client of action to make booking may include:

- Including organisational contact details in the quotation
- Advising client of web-based opportunities to lodge a booking
- Notifying client of any early-bird discounts or bonuses that apply to placement of bookings before a nominated date
- Confirming need for deposit to accompany booking, where applicable.

Advise client of any changes may include:

- Contacting client to advise of price changes that impact on the supplied quotation
- Advising client of changes to proposed itinerary as caused by natural and other causes, including changes occasioned by fire, political unrest, closure of third party providers, restrictions on travel

- Providing a revised quotation incorporating identified changes
- Filing the paper-based revised quotation and updating required electronic files.

Maintain contact with the client may include:

- Adhering to enterprise schedule of contacts with clients
- Being sensitive to client resentment to contact
- Determining client preferences for contact
- Apologising for contact that is inconvenient
- Accommodating client requests to cease contact.

Implement actions to close the sale may include:

- Monitoring, identifying and responding appropriately to client buying signals, including verbal and non-verbal cues
- Encouraging customer to make purchase decisions through the use of appropriate and acceptable verbal and non-verbal prompts, including the provision of supplementary information, statement of comparisons, selling the benefits of the quotation, reminding client of timing limitations that apply to the quotation, advising client of imminent price rises that may impact on the products and services included in the quotation
- Providing approved marketing materials and gifts to encourage a buying decision
- Providing testimonials from satisfied clients
- Supplying sample products and services, including the provision of complimentary trips to significant, large group and/or VIP clients
- Congratulating the client when they make their positive buying decision
- Thanking the client for their business
- Encouraging the client to make further purchases.

Record changes may include:

- Up-dating quotation files

- Notifying relevant other personnel and departments
- Notifying suppliers, providers and carriers, where appropriate.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- Enterprise policies and procedures in regard to supplying quotations including requirements relating to costing and pricing, use of preferred suppliers, format for quotation submission and acceptable strategies for selling
- Knowledge of the products and services (including special deals and packages) offered by the organisation including products and services available through approved suppliers, providers and carriers
- Principles of selling
- Ability to use research, communication, negotiation and sales closure techniques
- Knowledge of contractual arrangements with preferred suppliers, providers and carriers, including their terms and conditions that apply to clients
- Knowledge of industry commission and mark-up standards and practices
- Knowledge of host country legislation that applies to consumer protection and fair trading
- Ability to process statistical information, manipulate figures and calculate prices
- Ability to operate a computer reservation system and determine the availability of bookings as required by the quotation requirements.

Linkages To Other Units

- Access and retrieve computer-based data
- Communicate on the telephone
- Develop and update local knowledge
- Work effectively with colleagues and customers
- Establish and maintain a business relationship

- Produce documents, reports and worksheets on a computer
- Prepare business documents
- Use common business tools and technology
- Manage legal requirements for business compliance
- Develop and update tourism industry knowledge
- Promote products and services to customers
- Operate a computerised reservation system
- Access and interpret product information
- Apply advance airfare rules and procedures
- Book and coordinate supplier services
- Construct and ticket a non-air travel plan
- Construct and ticket domestic airfares
- Construct and ticket promotional international airfares
- Construct and ticket regular international airfares
- Maintain product information inventory
- Receive and process reservations
- Source and package tourism products and services
- Source and provide destination information and advice
- Build and maintain a team approach to service delivery
- Promote tourism products and services
- Source and present information.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures in regard to supplying quotations including requirements relating to costing and pricing, use of preferred suppliers, format for quotation submission and acceptable strategies for selling
- Demonstrated ability to prepare and present a written quotation for travel-related products and services (including travel to and from a given destination via at least two intermediary stop-overs, accommodation, meals, destination travel arrangements, activities, attractions and a sample itinerary) to align with nominated client requirements
- Demonstrated ability to prepare and present a written quotation for an event or function-related booking (travel, accommodation, meals, and associated requirements as indicated) to align with nominated client requirements.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace application of practices to prepare and submit quotations.

Resource Implications

Training and assessment must include the use of real or simulated enquiries, real or simulated clients, real or simulated booking requirements, real destinations, real events, real activities, real prices and costs, and real interpersonal interactions.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Analysis of quotations and itineraries produced, including evaluations of accuracy, presentation, accuracy and alignment of quotation with stated requirements
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit		
<i>Level 1 = competence to undertake tasks effectively</i>		
<i>Level 2 = competence to manage tasks</i>		
<i>Level 3 = competence to use concepts for evaluating</i>		
Key Competencies	Level	Examples
Collecting, organising and analysing information	3	Determine quotation requirements
Communicating ideas and information	1	Explain quotations to client
Planning and organising activities	2	Schedule activities to accommodate client needs and available supplier/carrier provisions
Working with others and in teams	2	Liaise with internal and external colleagues to develop itinerary and quotation
Using mathematical ideas and techniques	2	Calculate costs and selling prices
Solving problems	1	Resolve clashes in itinerary and quotation requirements
Using technology	3	Use the internet and computerised reservation systems to determine quotations and itineraries