

Training Package	Tourism, Hospitality and Events (SIT07v2.3)		HSC Requirements and Advice
Unit title	Prepare quotations		
Unit code	Competency field	Sector	HSC Indicative Hours
SITTTSL006B	Tourism Sales and Operations	Tourism	15

Unit descriptor	<p>This unit describes the performance outcomes, skills and knowledge required to calculate the costs of products and services accurately and to present quotations to customers. It requires the ability to provide quotations for products and services where some costing and pricing has already been undertaken in the product development phase. As such it underpins SITTPPD003B Source and package tourism products, which deals with the more advanced skills to actually source, price and package product.</p> <p>No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.</p>
Prerequisite units	<p>This unit must be assessed after the following prerequisite unit:</p> <ul style="list-style-type: none"> SITTTSL002A Access and interpret product information.
Application of the unit	<p>This unit describes a key sales and operational function for a diverse range of domestic and international tourism and hospitality products and services and applies to the full range of industry sectors. The tourism or hospitality organisation could be a principal (the supplier) or an agent quoting on products and services on behalf of the principal.</p> <p>The unit has particular application to those personnel who sell as a key focus of their job role. It applies to frontline sales or operations personnel who operate with some level of autonomy or under limited supervision and guidance from others. It is undertaken by a diverse range of people such as 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 businesses.</p> <p>The range of products and services and complexity of quotations will vary according to the industry sector. 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 tourism industry operations and the particular needs of the job role.</p>
Employability skills	<p>The required outcomes described in this unit of competency contain applicable facets of employability skills. The <i>Employability Skills Summary</i> of the qualification in which this unit is packaged, will assist in identifying employability skill requirements.</p>

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Context of and specific resources for assessment	Methods of assessment	Assessing employability skills
<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • ability to prepare and provide multiple accurate quotations in response to multiple customer requests covering a range of tourism products and services and ideally as a component of integrated work activity • knowledge of industry practices in relation to commissions, mark-up and fees • project or work activities that show the candidates' ability to prepare quotations within the context of the particular industry sector in which they are working or seeking work; for those undertaking generic pre-employment training, assessment must cover a range of industry contexts to allow for a broad range of vocational outcomes • completion of quotations within typical workplace time constraints and the deadlines determined by the customer and the organisation. 	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> • demonstration of skills within a fully equipped industry-realistic office environment using appropriate computers, printers, information programs, publications and software programs currently used in the tourism industry to assist the quotations function or demonstration within the applicable sales environment for the sector e.g. a conference venue for the Events sector or touring environment for the Guiding and Tour Operations sectors • use of relevant and current product information to support the quotation process, e.g. brochures, timetables, tariffs and product sales kits • use of a full range of operational documentation, e.g. details of supplier contracts and customer files. 	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> • evaluation of integrated activities completed by the candidate, including sourcing information on destinations, selling products and issuing documents • evaluation of a range of quotations prepared by the candidate • case studies to assess ability to provide accurate quotations in response to particular customer requests or for a series of customer files • written and oral questioning or interview to test knowledge of the principles that underpin quotation procedures and the consumer protection regulations that would apply • review of portfolios of evidence and third party workplace reports of on the job performance by the candidate. <p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> • SITTTSL005A Sell tourism products and services • SITTTSL007B Receive and process reservations • SITTTSL010B Control reservations or operations using a computerised system. 	<p>Employability skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts.</p> <p>Employability skills embedded in this unit should be assessed holistically with other relevant units that make up the skill set or qualification and in the context of the job role.</p>

Required Skills and Knowledge		HSC Requirements and Advice
This section describes the essential skills and knowledge and their level, required for this unit.		
<p>The following skills must be assessed as part of this unit:</p> <ul style="list-style-type: none"> • literacy skills to read and interpret documents such as customer files, customer requests and complex product costing information • writing skills to create customer files and document complex customer requests, complex costings and complex written quotations, including the conditions specifically applicable to the quotation • numeracy skills to calculate complex costing components. 	<p>The following knowledge must be assessed as part of this unit:</p> <ul style="list-style-type: none"> • key principles and elements of calculating costs and components of quotations • product knowledge appropriate to the specific tourism or hospitality industry sector and the products included in the quotation • negotiated cost of supply, contractual arrangements and preferred supplier arrangements in place • industry commission and mark-up procedures appropriate to the specific industry sector • quotation systems and procedures appropriate to the specific industry sector • broad and working knowledge of legal and consumer protection issues that relate to providing quotations and to the products covered by the quotation. 	<p>Key Terms and Concepts</p> <ul style="list-style-type: none"> • commissions • conditions and limitations of quotations • fees • mark-up • products • quotation • records • services • special fees and charges.

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
1 Calculate costs of products and services.	1.1 Create records to administer the customer's details and requirements.	<p>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <i>Bold italicised</i> wording in the performance criteria is detailed below.</p> <p><i>Customer records</i> may be:</p> <ul style="list-style-type: none"> • a computer file • a manual file. 	<p>Learning experiences for the HSC must address:</p> <p>Define:</p> <ul style="list-style-type: none"> • record • records management. <p>An understanding of:</p> <ul style="list-style-type: none"> • what is a record • what is not a record • when a record should be made • workplace/organisation record-keeping obligations. <p>Knowledge of types of customer records including:</p> <ul style="list-style-type: none"> • electronic profile • booking card • booking/client file • file diary. <p>Required customer details including:</p> <ul style="list-style-type: none"> • name, initial and title • age of any children or infants • contact details at home and work • date(s) of travel • origin and destination(s) • tourism product details • club membership or loyalty program details (eg frequent flyer number) • special requirements (eg special meals) • method of payment and associated details. <p>Knowledge of quotation systems and procedures appropriate to the industry sector and workplace/organisation.</p> <p>A knowledge of legal and consumer protection issues relating to provision of quotations.</p>
	1.2 Source and accurately select and interpret product and costing information required to prepare the quotation .	<p>Quotations:</p> <ul style="list-style-type: none"> • may be for a broad range of <i>products and services, including:</i> <ul style="list-style-type: none"> - single product or service 	<p>Learning experiences for the HSC must address:</p> <p>Importance of accessing relevant and correct information in a tourism workplace/organisation.</p>

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		<ul style="list-style-type: none"> - multiple products and services making up a complete itinerary - inclusive products or optional touring products - groups - individuals - one-off touring arrangements - series tours - incentive tours - meetings - conferences • may be prepared: <ul style="list-style-type: none"> - manually - using a computer • may be provided by: <ul style="list-style-type: none"> - telephone - verbally in a face-to-face context - fax - email or other electronic transmission - mail - internal communication. 	<p>A range of sources of information including:</p> <ul style="list-style-type: none"> • manual or online information and reservation systems • brochures/flyers • product manuals • product sales kits • tariff sheets • confidential tariff contracts • internet product websites • preferred agreements • tour operators/wholesalers. <p>Opportunities for students to access and use a range of information sources and interpret their content.</p> <p>Knowledge of a range of products and services appropriate to the industry sector.</p> <p>Opportunities to interpret a range of product and costing information including:</p> <ul style="list-style-type: none"> • supplier and agent details • validity dates • seasonality • restrictions • inclusions/exclusions • child and infant costing • currency • conditions of sale • government and other taxes. <p>An understanding of variations in pricing and their application to:</p> <ul style="list-style-type: none"> • transportation • accommodation • tours • admissions • performances • meals • portorage • tips • insurance • foreign exchange.

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	1.3 If required, negotiate costs with suppliers according to commercial agreements and relationships, and within scope of individual responsibility.		<p>Learning experiences for the HSC must address:</p> <p>An understanding of:</p> <ul style="list-style-type: none"> • negotiated cost of supply • contractual arrangements • preferred supplier arrangements • commercial agreements.
	1.4 Calculate commissions or mark-up nett costs according to organisation procedures and requirements to determine a profitable selling price.		<p>Learning experiences for the HSC must address:</p> <p>Calculations common to a tourism industry workplace/organisation including:</p> <ul style="list-style-type: none"> • addition • subtraction • multiplication • division • percentages. <p>Procedures for ‘rounding off’ figures when estimating costs.</p> <p>Knowledge of industry practices in relation to:</p> <ul style="list-style-type: none"> • fees • mark-up • commissions.
	1.5 Accurately calculate any additional taxes, <i>special fees and other charges</i> .	<p><i>Special fees and charges</i> may include:</p> <ul style="list-style-type: none"> • service fee • transaction fee • itinerary preparation fee • visa and passport handling fee • loyalty program (eg frequent flyer) redemption fee • product booking fee • amendment fee • cancellation fee • reconfirmation fee • courier fee • credit card fee • communication fee. 	<p>Learning experiences for the HSC must address:</p> <p>A knowledge of a range of possible fees and charges including those for:</p> <ul style="list-style-type: none"> • service • credit card transactions • visa and passport • taxes • booking • amendments and cancellations.

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	1.6 Accurately calculate any required currency conversions.		<p>Learning experiences for the HSC must address:</p> <p>Calculation of currency conversion using the bank selling rate (BSR) and bank buying rate (BBR):</p> <ul style="list-style-type: none"> • from Australian dollars into foreign currency • from foreign currency into Australian dollars.
	1.7 Accurately calculate the final cost to the customer.		<p>Learning experiences for the HSC must address:</p> <p>Calculations for a range of quotations of varying difficulty.</p> <p>An understanding of the consequences of incorrect calculations for:</p> <ul style="list-style-type: none"> • the customer • the workplace/organisation • the employee. <p>The importance of checking calculations.</p>
	1.8 Check all calculations against all <i>product and service</i> components.	<p>Some examples of <i>products and services</i> included in quotations are:</p> <ul style="list-style-type: none"> • domestic products and services • international products and services • transportation • transfers • accommodation • entertainment • tours • cruises • entrance to attractions or sites • tour guiding services • activities • meals • functions • special items with customer’s corporate branding • venue hire • speaker services • audiovisual services • meeting or event equipment • special event consumable items • catering. 	<p>Learning experiences for the HSC must address:</p> <p>A knowledge of a range of product and service components that may be included in quotations including:</p> <ul style="list-style-type: none"> • domestic products and services • international products and services • transportation • transfers • accommodation • entertainment • tours • cruises • entrance to attractions or sites • tour guiding services • activities • meals • functions • special items with customer’s corporate branding • venue hire • speaker services • audiovisual services • meeting or event equipment

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
	1.9 Keep detailed and legible records of the method of calculation, according to organisation formats.		<ul style="list-style-type: none"> • special event consumable items • catering. <p>Learning experiences for the HSC must address: Recording calculations appropriately.</p>
2 Provide quotations to customer.	2.1 Prepare the quotation to reflect all inclusions required by the customer.		<p>Learning experiences for the HSC must address: Current industry practice in relation to preparing reports.</p> <p>Knowledge of components of a quotation including:</p> <ul style="list-style-type: none"> • selling price • inclusions and exclusions • options as appropriate • cost of items that are subject to availability • prices subject to change • inclusion of fees, taxes and levies • payment requirements • general conditions and rules • date of current quote • life/expiry date of quotation. <p>Preparation of quotations across a range of customers and covering a range of tourism products and services.</p> <p>Presentation of quotations for customers in a structured format according to tourism industry and/or workplace/organisation guidelines.</p>
	2.2 Promptly provide accurate <i>quotation</i> to the customer according to organisation procedures and formats.		<p>Learning experiences for the HSC must address: An understanding of the importance of:</p> <ul style="list-style-type: none"> • explaining inclusions, exclusions and conditions of the quotation to the customer • providing an opportunity for customer questions regarding the quotation. <p>A range of methods to provide quotations to customers:</p> <ul style="list-style-type: none"> • face-to-face

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			<ul style="list-style-type: none"> • telephone • electronically • facsimile • letter. <p>An understanding of:</p> <ul style="list-style-type: none"> • methods of customer acceptance of quotations • ‘cooling off’ period for customer after acceptance of quotation.
	2.3 Offer secondary quotations with options, as appropriate.		
	2.4 Ensure all quotations include accurate details of the cost of product and service provision and the <i>conditions and limitations of the quotation</i> .	<p><i>Conditions and limitations of the quotation</i> (initial and subsequent) may include:</p> <ul style="list-style-type: none"> • inclusions • exclusions • cost of items that are subject to availability • prices subject to change • inclusion of fees, taxes and levies • general conditions and rules • payment requirements • date of current quotation • life and expiry date of quotation • changes of conditions of pre-existing quotation or booking • changes to provision of pre-existing booking • legislative requirements such as cooling-off period after acceptance of quotation • methods of customer accepting quotation. 	
	2.5 Record all details of the quotation accurately and legibly and keep on file according to organisation procedures.		<p>Learning experiences for the HSC must address:</p> <p>The importance of recording information that is:</p> <ul style="list-style-type: none"> • clear • legible • accurate • concise • appropriate in terms of industry terminology and abbreviations.

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	2.6 Minimise use of printed materials and maximise electronic transmission and filing of all documents to reduce waste and negative environmental impacts.		
3 Update and amend quotations.	3.1 Adjust and update quotations to take account of changed requests or arrangements.		<p>Learning experiences for the HSC must address:</p> <p>Updating and amending quotations as a result of:</p> <ul style="list-style-type: none"> • change of date • change of product/services required • addition/reduction of services required • excessive exchange rate change • number in group • expiry of option(s) • late booking fee(s).
	3.2 Provide the most up-to-date quotation to customers inclusive of new conditions and limitations.		<p>Learning experiences for the HSC must address:</p> <p>Workplace/organisation systems and protocols for preparation of quotations including:</p> <ul style="list-style-type: none"> • naming standards • version control • tracking processes.
	3.3 Record all details of adjusted quotations and keep on file according to organisation procedures.		