

Training Package	Tourism (THT02)	HSC Requirements and Advice
Title:	Prepare quotations	
Unit Code	Unit Descriptor:	HSC Indicative Hours:
THTSOP05B	This unit deals with the skills and knowledge required to calculate the costs of products and services accurately and to present quotations to customers. This unit applies to many sales staff across multiple tourism sectors including travel consultants, reservations sales agents and event co-ordinators or managers. Generally, this unit relates to the provision of quotations for products and services where some costing and pricing has already been undertaken in the product development phase. As such it underpins the unit THTPPD03B Source and package tourism products and services which deals with the more advanced skills to actually source, price and package product.	10

Essential Knowledge and Skills to be Assessed	Critical Aspects of Assessment	Context of Assessment and Resource Implications	Assessment Methods	HSC Requirements and Advice
<p>The following knowledge and skills must be assessed as part of this unit:</p> <ul style="list-style-type: none"> product knowledge as appropriate to specific industry sector quotation systems and procedures as appropriate to the specific industry sector negotiated costs, contractual arrangements and preferred supplier arrangements in place industry commission/mark up procedures as appropriate to the specific industry sector legal and consumer protection issues in specific relation to providing quotations. 	<p>Evidence of the following is critical:</p> <ul style="list-style-type: none"> ability to accurately cost and quote on a range of tourism products and services within enterprise acceptable timeframes knowledge of industry practices in relation to commissions and mark-up. 	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> demonstration of skills in preparing and providing quotations for multiple products and to meet different customer needs (ideally as a component of integrated work activity). demonstration of skills within a fully-equipped industry-realistic office environment using appropriate computers, printers, information programs and publications use of a full range of operational documentation eg. details of supplier contracts and customer files. the completion of co-ordinating quotations and maintaining files within timeframes and constraints that reflect typical industry practice. 	<p>Assessment methods must be chosen to ensure that the skills required to prepare and provide quotations can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.</p> <p>The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> evaluation of integrated activities completed by the candidate (may include destinations, products, quotations and ticketing) 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 which underpin quotation procedures and the consumer protection regulations which would apply review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate. 	<p>Key Terms and Concepts</p> <ul style="list-style-type: none"> commission contractual arrangements currency conversion customer records exclusion inclusion mark-up negotiated costs nett cost options preferred supplier product costing product and service knowledge quotation quotation system restriction secondary quotation selling price taxes.

		Linkages with Other Units		
		<p>This unit must be assessed with or after the following unit. That unit describes skills and knowledge that are essential to this unit of competence:</p> <ul style="list-style-type: none"> • THTSOP03B Access and interpret product information <p>This unit also has strong linkages to other Sales and Office Operations units and combined training and assessment is recommended. Depending on the industry sector or enterprise context, this unit could be assessed with:</p> <ul style="list-style-type: none"> • THTSOP04B Sell tourism products and services • THTSOP06B Receive and process reservations • THTSOP08B Operate a computerised reservations system • THHGCS05B Organise in-house functions 		

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>This unit applies to all tourism industry sectors and enterprises where quotations are provided to customers. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances.</p> <p>The range of products and services will vary according to the industry sector. Training and assessment must take account of the fact that the nature of quotations and the customers for whom they are prepared will vary accordingly.</p> <p>Customer records 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>Broad knowledge of types of client records including:</p> <ul style="list-style-type: none"> • electronic profiles • booking cards • booking files • file diaries. <p>Required client details:</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 details eg Frequent flyer number • special requirements eg special meals • method of payment including details. <p>Importance of recording details accurately and promptly.</p>
	1.2 Source and accurately select and interpret product and costing information	<p>Quotations may be provided for an enormous range of products and services. Some examples of products and services included in quotes 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 • tourist guiding services • activities • meals • functions • special items with customer's corporate branding • venue hire • speaker services • audiovisual services • meeting or event equipment 	<p>Learning experiences for the HSC must address:</p> <p>Identifying and accessing sources of information including:</p> <ul style="list-style-type: none"> • manual or computerised information and reservation systems • brochures or flyers • product manuals • schedules • tariff sheets • confidential tariff contracts • internet product websites • preferred agreements. <p>Select and interpret appropriate product costing information based on:</p> <ul style="list-style-type: none"> • industry standards • agency manuals • preferred agreements • negotiated costs • client/customer needs.

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		<ul style="list-style-type: none"> • special event consumable items • catering. 	<p>Interpret the content of a product costing including:</p> <ul style="list-style-type: none"> • supplier and agent details • validity dates • seasonality • restrictions • inclusions • child and infant costing • currency • conditions of sale • government and other taxes • free of charge (FOC). <p>Identify variations in pricing and interpret their application to:</p> <ul style="list-style-type: none"> • transportation • accommodation • tours • admissions • performances • meals • portorage/tips • insurance.
	<p>1.3 If required, negotiate costs with suppliers in accordance with commercial agreements and relationships and level of responsibility held within the enterprise.</p>		
	<p>1.4 Calculate commissions or mark up nett costs in accordance with enterprise procedures and requirements to determine selling price.</p>		
	<p>1.5 Accurately calculate any additional taxes, special fees and other charges.</p>		

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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 from Australian dollars into foreign currency and from foreign currency into Australian dollars using the Bank Selling Rate (BSR) and Bank Buying Rate (BBR).</p>
	1.7 Accurately calculate the final cost to the customer.	<p>Quotations may be for:</p> <ul style="list-style-type: none"> • a single product or service • multiple products and services making up a complete itinerary • groups • individuals • one off touring arrangements • series tours • incentive tours • meetings • conferences. 	<p>Learning experiences for the HSC must address:</p> <p>Combining component costs to provide a total per person cost for:</p> <ul style="list-style-type: none"> • twin share • single • triple share • child twin • child as 3rd person • infant • sole traveller • group.
	1.8 Check all calculations and keep detailed and legible records of the method of calculation, in accordance with enterprise formats.	<p>Quotations may be prepared:</p> <ul style="list-style-type: none"> • manually • using a computer. <p>Quotations may be provided by:</p> <ul style="list-style-type: none"> • telephone • fax • email or other electronic transmission • mail • internal communication. <p>Customer records 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>Accuracy, currency and legibility in the completion of client records.</p> <p>Industry accepted abbreviations and codes including:</p> <ul style="list-style-type: none"> • confirmed (KK) • waitlisted (WL) • need (NN) • request (RQ) • ticketing time limit (TTL) • phonetic alphabet.
2 Provide quotations to customer	2.1 Provide accurate quotations to customers in accordance with enterprise procedures and formats.		<p>Learning experiences for the HSC must address:</p> <p>Methods of providing quotations to customers:</p> <ul style="list-style-type: none"> • email • telephone • fax • letter • internal communication.
	2.2 Offer options with secondary quotations, as appropriate.		

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	2.3 Ensure that all quotations include accurate details on the following: <ul style="list-style-type: none"> • inclusions and exclusions • payment requirements • general conditions and rules • date of current quote, life/expiry date of quotation. 		Learning experiences for the HSC must address: Presentation of quotations to customers in a structured format according to tourism industry and/or enterprise guidelines, including: <ul style="list-style-type: none"> • selling price • options as appropriate • inclusions and exclusions • payment requirements • general conditions and rules • date of current quote • life/expiry date of quotation.
	2.4 Record all details of the quotation accurately and legibly and keep on file in accordance with enterprise procedures		
3 Update and amend quotations	3.1 Adjust and update quotations to take account of changed requests or arrangements.		Learning experiences for the HSC must address: Updating and amending quotations as a result of: <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 quote to customers and ensure they are aware of the currency of the quote.		Learning experiences for the HSC must address: Provision of quotes to customers including: <ul style="list-style-type: none"> • date of preparation of quote • explanation of inclusions, exclusions and conditions • opportunity for customer questions.
	3.3 Record all details of adjusted quotes and keep on file in accordance with enterprise procedures.		

Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Sourcing appropriate product and rate information, interpreting current product costs and conditions and evaluating the most appropriate fit for the customer
Communicating Ideas and Information	1	Providing information to customers on the conditions specifically applicable to the products quoted to them
Planning and Organising Activities	2	Determining and working towards the customer's quotation deadline Prioritising the order of quotations to be provided to various customers
Working with Others and in Teams	1	Requesting information from product suppliers Sharing newly released information with colleagues involved in quoting
Using Mathematical Ideas and Techniques	2	Calculating the net costs of various products and services and calculating a mark up to determine the selling price to the customer
Solving Problems	1	Finding alternative products and costs to meet the customer's needs when first offered cost is not suitable
Using Technology	1	Using a calculator Using a computerised information system to ascertain costs, conditions and schedules