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## ASTPC10

### Advise customers on services and estimate resources and costs



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#### Overview

This standard is about the initial contact stages with customers, where supervisors are responsible for this. It will apply to those in a supervisory role who also have the task of promoting their organisation's services to customers and carrying out an initial appraisal of their needs and preparing resource estimates.

It includes assessing whether the services offered by your organisation can meet the customer's need and putting together an estimate or tender for work.

This standard is for pest management practitioners.

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### Performance criteria

#### Advise customers on pest management services

*You must be able to:*

- P1 establish clearly the customer's requirements for information and services and that these are within the capability of your organisation
- P2 where customer requirements are not within the scope or capability of own organisation, refer them to others who will provide appropriate advice
- P3 provide the customer with clear and accurate information on the type, range, features and benefits of the services, relevant to their needs, which your own organisation can provide
- P4 where appropriate, suggest options which appear most likely to meet their needs and circumstances
- P5 clearly explain any issues relating to regulatory compliance and approvals and the procedures involved in provide the types of services they require
- P6 where appropriate and within the limits of your authority, advise on the likely costs and timescale involved in providing services
- P7 provide appropriate and accurate advice on organisations' policies for customer care and relevant service warranties
- P8 confirm with the customer their requirements for further information and services, in accordance with organisational procedures, and pass their request on to relevant people for follow up action

#### Assess the resource requirements and costs within an estimate, bid and tender

*You must be able to:*

- P9 develop a proposed method statement and draft programme which meet the tender requirements
- P10 calculate accurately from available sources, what resources will be needed, investigate whether the resources will be available and present the information so that the requirements can be costed and planned
- P11 estimate resource costs by calculating an accurate cost for each item which is required
- P12 modify the cost to take into account any external factors which may affect the cost projections
- P13 produce the overall estimate of costs and check that it is complete, accurate and in a form which is suitable for a judgment to be made
- P14 explain and clarify the projected costs to support the calculations
- P15 recommend payment schedules which will meet known cash flow requirements

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### Knowledge and understanding

#### Service provision

*You need to know and understand:*

- K1 the types and range of services provided by your organisation
- K2 the limitations on types and scale of services your organisation can provide
- K3 Impact of economic and industry issues on pest management
- K4 sales techniques
- K5 marketing techniques
- K6 the features and benefits of the services provided by your organisation
- K7 service warranties
- K8 sources of specialist services, information and advice
- K9 Regulatory requirements
- K10 relevant legislation relating to pest management
- K11 relevant legislation relating to health and hygiene
- K12 legislation relating to the selling and marketing of pest management services

#### Customer care

*You need to know and understand:*

- K13 the Trades Descriptions Act
- K14 your organisation's policies for customer care

#### Developing an estimate

*You need to know and understand:*

- K15 how and why you develop a proposed method statement and draft programme which meet the tender requirements
- K16 how you calculate what resources will be needed from available sources?
- K17 how you present information about resource availability so that the requirements can be costed and planned?
- K18 how and why you investigate whether the resources needed will be available
- K19 how you check that the overall estimate of costs is complete, accurate and in a form which is suitable for a judgment to be made
- K20 how you explain and clarify the projected costs to support the calculations
- K21 how and why you recommend payment schedules which will meet known cash flow requirements
- K22 how and why you estimate resource costs by calculating an accurate cost for each item
- K23 how and why you produce the overall estimate of costs
- K24 how you modify the cost to take into account any external factors which may affect the cost projections

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### Additional Information

- Scope/range
- 1 communicate with customers:
    - 1.1 domestic
    - 1.2 commercial
  
  - 2 use different types of information and services:
    - 2.1 regulatory / enforcement
    - 2.2 treatments
    - 2.3 proofing
    - 2.4 hygiene
    - 2.5 control and management of infestation
  
  - 3 Tender requirements:
    - 3.1 construction
    - 3.2 installation and maintenance work
    - 3.3 supply of goods and materials
    - 3.4 low carbon & resource efficient procurement;
    - 3.5 consultancy services
    - 3.6 purchasing
    - 3.7 invitation to tender
    - 3.8 form of tender
    - 3.9 technology required
    - 3.10 procedures for submitting tenders
  
  - 4 available sources:
    - 4.1 client brief
    - 4.2 tender enquiry documentation
    - 4.3 site measurements / visits
    - 4.4 survey reports
    - 4.5 scaled drawings
    - 4.6 schedules
    - 4.7 method statements
    - 4.8 programmes
    - 4.9 suppliers
  
  - 5 Resources:
    - 5.1 people (in-house, external)

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- 5.2 plant and equipment
- 5.3 materials
- 5.4 finance
- 5.5 time
- 5.6 supply options
  
- 6 Estimate:
  - 6.1 cost based on a quotation
  - 6.2 unit cost built up from basic data
  - 6.3 internal and historical cost data
  - 6.4 published cost data
  
- 7 Calculate costs:
  - 7.1 manual
  - 7.2 electronic
  
- 8 External factors:
  - 8.1 variations over time
  - 8.2 location
  - 8.3 statutory and contractual requirements
  - 8.4 special working conditions and methods
  - 8.5 resourcing conditions
  - 8.6 competition

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**Relevant occupations** Pest Management Practitioners

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**Suite** Pest Management

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