

ASTPES10

Advise customers on service and estimate resources and costs



Overview

This unit covers 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.

Element 10.1 covers the competence required to assess whether the services offered by your organisation can meet the customer's need. You will need to identify what the customer wants and provide advice on costs and timescales of the proposed work.

Element 10.2 covers the competence required to put together an estimate or tender for work. When putting together the proposed method you will need to take into account resource requirements and other factors that may affect the work and communicate these clearly to the customer.

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Performance criteria

Advise customer on pest control 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 the features and benefits of the services provided by your organisation
- K4 service warranties
- K5 sources of specialist services, information and advice

Regulatory requirements

- K6 relevant legislation relating to pest control
- K7 relevant legislation relating to health and hygiene

Customer care

- K8 the Trades Descriptions Act
- K9 your organisation's policies for customer care

Developing an estimate

- K10 how and why to develop a proposed method statement and draft programme which meet the tender requirements
- K11 how to calculate what resources will be needed from available sources
- K12 how to present information about resource availability so that the requirements can be costed and planned
- K13 how and why to investigate whether the resources needed will be available
- K14 how to check that the overall estimate of costs is complete, accurate and in a form which is suitable for a judgement to be made
- K15 how to explain and clarify the projected costs to support the calculations
- K16 how and why to recommend payment schedules which will meet known cash flow requirements
- K17 how and why to estimate resource costs by calculating an accurate cost for each item
- K18 how and why to produce the overall estimate of costs
- K19 how to modify the cost to take into account any external factors which may affect the cost projections

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Additional Information

Scope/range related to performance criteria

Advise customer on pest control services

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

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

3. Tender requirements:
 - 3.1. construction
 - 3.2. installation and maintenance work
 - 3.3. supply of goods and materials
 - 3.4. consultancy services
 - 3.5. purchasing
 - 3.6. invitation to tender
 - 3.7. form of tender
 - 3.8. technology required
 - 3.9. 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 - type:
 - 5.1. people (in-house, external)
 - 5.2. plant and equipment
 - 5.3. materials
 - 5.4. finance

 - 5.5. time

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5.6. supply options

6. Estimating:
 - 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. Calculating cost:
 - 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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Developed by Asset Skills

Version number 1

Date approved March 2006

Indicative review date March 2008

Validity Current

Status Original

Originating organisation Asset Skills

Original URN PES10

Relevant occupations Pest Controller

Suite Pest Control

Key words pest, rodent, vermin, infestation, exterminators, rats, mice, ants, cockroaches, squirrels, bees