

COGSIGN25

Prepare and produce quotations



Overview

This unit deals with the following:

1. Calculate costs
2. Obtain selling price
3. Obtain estimates
4. Present final quotations

During this work you must take account of the relevant operational requirements and safe working practices AS THEY APPLY TO YOU.

Previous Version: Unit 3.05 National Occupational Standards in Signmaking (CWP1)

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Performance criteria

- You must be able to:*
- P1 consult a variety of information sources to establish production costs to achieve the specification
 - P2 check that the information obtained is current, relevant and accurate
 - P3 consult with relevant personnel to obtain the price of materials and services to achieve the specification
 - P4 establish costs from calculations based on established methods of working and relevant information
 - P5 adjust costs where time constraints or resource contingencies necessitate alternative provision
 - P6 apply purchasing prices according to organisational requirements
 - P7 record relevant information and cost calculations accurately and legibly according to organisational requirements
 - P8 follow relevant health and safety and environmental requirements and legislation at all times
 - P9 confirm that costings are accurate and current according to organisational requirements
 - P10 identify any discrepancies and take the relevant remedial action
 - P11 ensure that prices take into account current strengths, weaknesses, opportunities and threats
 - P12 ensure that information requested by the person setting the selling price is obtained and provided promptly
 - P13 apply pricing policy and establish the appropriate selling price
 - P14 record established selling price accurately and legibly according to organisational requirements using the appropriate documentation
 - P15 identify supplies that need to be purchased from outside suppliers
 - P16 identify suitable suppliers and specify required supplies
 - P17 request estimates to meet supply specifications and ensure they arrive within required time schedule
 - P18 analyse estimates received against specifications and enter into negotiations as required
 - P19 select the estimate that is most suitably matched to specifications
 - P20 prepare quotations which contain all of the relevant information
 - P21 prepare quotations in a suitable format using appropriate documentation to meet the needs of the client and organisation
 - P22 check quotations and identify and rectify any discrepancies
 - P23 undertake a final check of quotations and identify and note any contingencies and potential liabilities
 - P24 identify, obtain and submit samples and relevant information requested by the client with the quotation
 - P25 forward quotations to the client in the requested format and follow up in accordance with organisational requirements
 - P26 classify client quotations and forward for filing in accordance with organisational requirements

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Knowledge and understanding

You need to know and understand:

- K1 how to establish production costs - design, manufacture, installation
- K2 importance of accurate costings and calculations
- K3 importance of using all information courses
- K4 organisational procedures and practices
- K5 information sources available
- K6 different production techniques - design, manufacture, installation and how they are applied
- K7 who are the relevant personnel
- K8 what problems may occur
- K9 what is the appropriate action to take if there are problems
- K10 what legislation and organisational codes of practice are relevant
- K11 what are the consequences of not following legislation and organisational requirements
- K12 what health and safety and environmental requirements and legislation are relevant and how to follow them
- K13 what are the consequences to you and to others of not following health and safety and environmental legislation
- K14 how to confirm costings in accordance with requirements
- K15 discrepancies likely to be encountered and how they are dealt with
- K16 importance of obtaining and recording information
- K17 importance of strengths, weaknesses, opportunities and threats analysis
- K18 pricing policies and how to apply them
- K19 organisational procedures and practices
- K20 how to identify purchase requirements
- K21 how to identify and contact suppliers
- K22 importance of communication when negotiating with suppliers
- K23 importance of obtaining accurate quotations
- K24 how to analyse estimates
- K25 how to negotiate
- K26 how to select most suitable estimate
- K27 discrepancies likely to be encountered and how they are dealt with
- K28 how to prepare estimates in suitable formats
- K29 consequences of inaccurate estimates
- K30 different types of samples and information to submit with estimates
- K31 different formats in which estimates can be produced

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Additional Information

Glossary

Relevant Personnel

Suppliers, colleagues, internal and external technical specialists, purchasing, team leaders, supervisors etc.

Information Sources

Material costs, labour requirements, labour costs, policies for allocating overheads, running allowances, historical data

Organisational Requirements

Manufacturing, sales, policies, procedures

Production Costs

Cost rates, machine time/outputs

Materials and Services

Raw materials, consumables, externally purchased

Relevant Remedial Action

Record, report, adjust

Recording Methods

Manual, computerised

Strengths, Weaknesses, Opportunities and Threats

Market forces, current workload, type of work, client history, changes in technology

Specifications

Price, quality, quantity, delivery schedule

Contact with Suppliers

Written, telephone, face-to-face

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Supplies

Sub-contractor, materials

Client

Internal or external

Format of Final Estimates

Routine formal estimate with sales letter, promotional packages, samples

Relevant Health and Safety and Environmental Requirements

What your responsibilities are in respect of health and safety and environmental requirements and legislation, regulations, safe working practices, local, national and organisational/site specific procedures

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Suite Signmaking

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