

# COGWT31

## Prepare, produce and present quotations and tenders



### Overview

This unit is for those with responsibility to provide prices to clients for the supply of products and services. Provision can include quotations and formal tender replies in a number of formats:

- 1 verbal and written quotations
- 2 tender documentation
- 3 catalogues and price lists
- 4 electronic media including web sites, email

This includes all products and services that may be supplied to a client for water treatment, water hygiene, equipment installation and servicing, legionella monitoring works and legionella risk assessments.

### Previous Version

None

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### Performance criteria

- You must be able to:*
- P1 establish the water treatment programme design for the quotation/tender to be prepared
  - P2 gather data required to prepare quotation/tender from available sources
  - P3 obtain quotations/prices for any products to be provided by others
  - P4 obtain quotations/prices for any services to be provided by sub contractors
  - P5 identify who the quotation/tender should be provided to
  - P6 calculate costs and prices to provide the water treatment programme in accordance with company operating procedures
  - P7 record calculations in accordance with company operating procedures and company documentation
  - P8 establish the appropriate selling price in accordance with company operating procedures
  - P9 identify any supporting documentation required by the quotation/tender procedure
  - P10 identify the method of presentation to be adopted in accordance with company procedures and the quotation/tender requirements
  - P11 identify any unique selling points (usp) with regard to your company or programme design and note these in accordance with the quotation/tender requirements
  - P12 identify any products or services that have not been provided that are required by the quotation/tender and note these
  - P13 produce quotation in a format required by company procedures and/or tender documentation
  - P14 prepare presentation materials and any resources required
  - P15 arrange for presentation to be provided to the identified persons
  - P16 present the quotation/tender to the identified persons in accordance with company operating procedure and/or tender requirements

### Knowledge and understanding

*You need to know and understand:*

- K1 what your personal responsibilities with regard to health and safety in the working area are
- K2 what your legal responsibility for your own health and safety, and the health and safety of others is
- K3 the company procedures relevant to the preparation, production and presentation of quotations and tenders
- K4 where to obtain the programme design
- K5 how to use the programme design
- K6 where data can be obtained and what other sources are available
- K7 how to meet the requirements of a tender
- K8 how to use the output of the data provided
- K9 what products are provided by others
- K10 how product quotes supplied by others should be obtained
- K11 what services are provided by sub contractors
- K12 how service quotes supplied by sub contractors should be obtained
- K13 how to use company operating procedures to produce costs and prices
- K14 what company operating procedures and documentation to use
- K15 what supporting documentation is available, and when and how to use it
- K16 where to obtain any supporting documentation required
- K17 what methods of presentation are available and the company procedures to use them
- K18 how to identify tender requirements
- K19 who to provide the quotation/tender to
- K20 what the unique selling points are for the product/service to be provided
- K21 how to present any unique selling points
- K22 what products and/or services required for the quotation/tender cannot be provided
- K23 what to do, in accordance with company operating procedures, if products/services cannot be provided

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- K24 what presentation formats are available and the company procedures for their use
- K25 how to prepare presentation materials and any other resources required
- K26 what facilities are required for the adopted presentation method
- K27 how to arrange for a presentation to be given
- K28 how to present quotation using the presentation method adopted

### Additional Information

#### Glossary

##### **Regulations and guidelines**

Includes relevant health, safety and environmental regulations, COSHH, Codes of Practice, British, European and International standards, site procedures

##### **Company operating procedures**

Includes company requirements, instructions and method statements

##### **Method of presentation**

Written quotation, tender forms, digital media, on-site presentation

##### **Available sources**

Includes survey, tender, contract, risk assessment etc

##### **Relevant people**

As defined in the survey, tender, contract etc

##### **Supporting documentation**

Includes MSDS, product data, registrations, certification, training records, insurance

##### **Unique selling points (USP)**

Products and services that differentiate the quotation from other potential suppliers

##### **Programme design**

The programme of water treatment for the specific system including chemical, microbiological, mechanical, physical

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### **Sub contractor**

Includes electrical, water, gas, air, lifting, plant hire, waste removal, specialist service provider

### **Water treatment programme**

Can include for any water system: chemical and non chemical processes, monitoring and inspection, sampling, equipment provision and servicing, legionella risk assessment, cleaning operations, remedial engineering works, other products and services associated with water systems

### **Presentation materials**

Includes verbal, written, digital media, on-line

### **Resources**

Includes electronic media, written material, references, flip charts

### **Identified persons**

Who the quotation/tender should be provided/presented to

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**Relevant occupations** Engineering and manufacturing technologies; Manufacturing technologies; Process, Plant and Machine Operatives; Process Operatives

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**Suite** Water Treatment Management

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