Preparing a job quotation

For this assignment you'll go through all the steps required to assess the time and resources needed to complete a carpentry job. You'll work out all the costs of the job and put together a quotation for your customer. You must ensure that you liaise with your customer at all times.

Stages	May be relevant to
The assignment asks you to:	
1 gather information about the job	N2.1
2 estimate the costs of materials and resources	N2.2, 2.3
3 talk to the customer about their requirements	N2.3
4 calculate and agree costs	N2.2
5 produce a quotation for the customer	N2.3, C2.3
6 rate your own performance	

Tips

- Before you start the assignment, choose a suitable job with the help of your employer.
- Keep notes of all the information you gather, as well as letters, phone call records, your final quotation, and testimonials.
- Keep copies of all your estimates and calculations.
- Make sure that you have access to a computer with a word-processing package for preparing your final quotation.
- If possible, get your employer or colleagues to evaluate your performance.
- If in doubt at any time, ask your trainer for guidance.

Suitable for: learners in wood occupations

What you need to do

Stage 1 Gather information about the job

Once you've talked to your employer and decided on a potential carpentry job that you can use for this assignment, you'll need to gather the information required to put together a quotation for the job. You'll need to obtain costings for:

- timber and board
- other materials.

Find out about labour charges and rates for the job. Talk to your employer about this if you need to.

Stage 2 Estimate the costs of materials and resources

- Estimate the amount of timber, board and other materials required.
- Estimate the time and labour costs.
- produce a Gantt chart showing the programme of work.

Stage 3 Talk to the customer about their requirements

Contact the customer and agree a time when you can carry out the measuring up. Agree the detailed requirements for the job with the customer. Prepare a scale diagram showing measurements.

Stage 4 Calculate and agree costs

To calculate costs, use the information you gathered in stages 1 and 2 to find out the total cost of each item. Make a list of these costs to produce an estimate of total costs. Discuss the details of your estimate, including any profit margins, with your employer. Make any amendments necessary.

Stage 5 Produce a quotation for the customer

Prepare a detailed final quotation for your customer, using a word-processing package to present it clearly.

- Send copies to both the customer and your employer.
- Follow up the quotation with a phone call to the customer to find out whether they have received it. Check that it covers their requirements and that they understand what will happen as the job is carried out.

Stage 6 Rate your own performance

Once you've produced your quotation and your employer and the customer have approved it, take time to think about how well you tackled this assignment:

- Did you do anything particularly well?
- What did you enjoy the most?
- What did you find challenging?
- Was there anything you could improve on next time?
- Can you offer any support or guidance to others?

Preparing a job quotation – trainer notes

Briefing and supporting the learner

- Involve the learner in choosing an appropriate assignment. Consider the business benefit.
- Consult with the learner's employer if necessary.
- Think about the learner's existing skills and knowledge – will they need help before they start?
- Decide whether to use the assignment to help the learner develop and practise their key skills or to gather portfolio evidence.
- Decide whether to use all or part of the assignment.
- How long will it take the learner to complete the assignment? How and when will you review progress?
- Explain the assignment to the learner so that they know what's involved and what's expected.
- Identify health and safety implications and make sure the learner is aware of these.

Adapting the assignment

This assignment is targeted at apprentices in carpentry, but could readily be adapted to other contexts.

Extending the assignment

The assignment could be relevant to WO2.1, 2.2 and 2.3, particularly if the learner asks their employer and customer to write a testimonial based around the job they eventually carried out.

They could use their work to produce a 'hints and tips' guide to help their colleagues.

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department for education and skills

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European Social Fund