
Overview

This standard would be viewed as an introductory unit for entrants to the industry. The aim is to give learners a basis of the tasks, costs, production issues and the use of outworkers.

The range of print processes the standard covers is:

- Lithography
- Flexography
- Gravure
- Die Stamping
- Screen Process
- Digital Printing

There may be a situation where some learners work in a “trade house”. In this instance estimates/quotations will only apply to products produced by your company.

Nowadays estimators get enquiries from many sources, from the web, email, telephone and more traditionally from sales representatives and in-house customer service. In all cases, situations will arise where the information supplied will not be accurate. Estimators have to be aware of the production processes to be able to spot any inaccuracies at an early stage and refer the enquiry back to source. Other issues that may occur are that supplied files can be presented in different formats and conversion techniques will have to be employed to make them print ready. Charges for issues like that have to be applied.

The vast majority of printers/outworkers, now have Management Information Systems (MIS) where standard costs are built in to the estimating programme, such as machine rates, house substrate prices, common substrate prices, consumable prices, plate prices, and in some cases pre agreed prices with outworkers for common production tasks. Although working out prices can be a fairly simple task using an MIS, there are other considerations to factor in such as the best way to produce a job, mainly for printing and finishing. It is the duty of the estimator to supply the client with the best possible price in order to secure the business. Many orders are lost because the estimator enters the information into the MIS and allows it to work out the price. Sometimes there are various ways to produce a job and the estimator has to have product knowledge, be aware of machine capabilities and sometimes a job can be produced across more than one machine. Cognisance must

be taken of how a job may be finished as this can have a bearing on the way the printing element of the job may be produced.

With some jobs there may be legal issues to consider and the estimator has to be aware of those. The knowledge required for this standard is therefore important and covers a wide range of topics.

**Performance
criteria**

- You must be able to:
- P1 review and clarify with the customer the information received to enable a quotation to be produced to meet the customer's requirements
 - P2 plan the production stages and sequence required
 - P3 use your company's estimating system to obtain customer prices for the product and quantity requested plus any run-on quantities.
 - P4 comply with your company's procedures for obtaining approval for quotations before forwarding to the customer.
 - P5 comply with your company's procedures and format for producing quotations.
 - P6 respond promptly to any queries from the customer, providing an explanation and advice as required
 - P7 provide the quotation to the customer in the format required by the customer and/or your company
 - P8 provide the customer with an estimated delivery time
 - P9 maintain an accurate record of the quotation, including a note of any additional or optional items discussed

Knowledge and understanding

You need to know and understand:

- K1 copyright
- K2 ownership of images
- K3 confidentiality
- K4 safe handling of customer material
- K5 how to communicate with internal and external customers
- K6 what the workplace policies are at your company
- K7 how to identify and assess printing options
- K8 how to identify and assess finishing options
- K9 the law of contract
- K10 materials used in the printing process and their purpose
- K11 proofing

Additional information

Scope / range: This standard is designed for the role of “Junior Estimator”. Learners will essentially be dealing with, what would be referred to as basic estimates/quotations. This will give them appreciation of the competencies and knowledge required before moving on to more complex estimates/quotations.

Areas that will require specific attention:

- possible methods of working
- production stages and sequence required
- outwork required
- what the customer has agreed to supply
- delivery date
- delivery requirements
- any critical issues affecting cost and/or working

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Produce quotations for printed products



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