



PREPARATION OF QUOTATIONS

OVERVIEW

This procedure is to ensure that all enquiries received have generated a quotation to meet the customer's needs. To ensure that all quotations generated are in line with man day tables and adequate resources will be available.

PROCEDURE

- A request for preparation of quotation (F-Quest-001) will be submitted by the prospective client. All relevant information is to be filled in on this form to be able to generate a formal quotation.
- Sancert will review the application and ensure that we have the capability to meet the client's requirements in terms of technicality, possible location restraints and / or requirements, as well as resource requirements.
- If we are unable to quote on the request, a formal letter will be drafted, stating the reason, and forwarded to the prospective client.
- If we are able to quote, the following process will take place:
- The man day tables (WP-TABLE-01) will be used to calculate the amount of days needed for the audits required. A reduction (if justifiable) of no more than 30% will be given on audit man-days.
- Other factors must also be taken into account when generating a quotation,
Examples of decrease factors: -
 - Small site for large number of employees
 - Length of time system has been implemented within the company
 - Number of duplicated job functions
 - Prior knowledge of company.
 - Cloud based systems
 - Remote working
 - IT infrastructure
Examples of increase factors: -
 - Complicated logistics (more than one location)
 - Interpreter required
 - Large site for small number of employees
 - Complex system
 - Night shift
 - Complex on-site IT hardware, such as servers, cabling and connection points

Doc No: WP-QUOTE-01
Version No: 011
Date Reviewed: December 2023



PREPARATION OF QUOTATIONS

- WP-MULTI-01 will be used when doing a quotation for Multi-Site organisations, this procedure outlines the sample size to be used and the methodology in auditing multi site organisations. F-PCR-002 (Pre-client review and quote calculation multi-site) will be used to document how audit man days were determined for Initial and surveillance audits.
- A review will be conducted to ensure we have the correct technical abilities to perform the audit, verified on training records and auditors data pack.
- Calculations will be made on the above factors, using the Quotation Calculation Sheet (F-PCR-001, F-PCR-002, F-PCR-003 or F-PCR-004).
- Please note when doing calculations for ISMS audits, the total number of persons doing work under the organisations control for all shifts within the scope of certification will be the starting point for determining required audit time.
- It is expected that the time calculated for planning and report writing combined should not typically reduce the total audit time to less than 70 % of the time calculated in accordance with audit time calculations and the factors for the adjustment of audit time for ISMS audits. Where additional time is required for planning and/or report writing, this shall not be a justification for reducing audit time.
- A quotation will now be generated on F-QUOTE-001, using the next quotation number in the sequence.
- Once the quotation has been generated, it must be reviewed and signed off in the review block at the bottom of the last page on the quotation.
- The quotation can now be issued to the prospective client. A copy of the Terms and Conditions F-T&C-002 will be emailed with the quotation. A copy is also available on www.sancert.global, mention of this is made in the quotation.
- “Acceptance of Quotation” will be part of the quotation, this will enable the client to accept and return as proof of acceptance. It is noted that if a client sends an email or pays the invoice, it is deemed that the invoice and terms and conditions have been accepted.
- Once the acceptance has been received, planning can take place for the audits to take place.
- Quotation will be held by the Financial Director.
- If approval is received, a copy of the quotation (F-QUOTE-001) as well as the signed Acceptance of Quotation, Pre-Client Review and Quote Calculation Sheet (F-PCR-001 or F-PCR-002) and the Quotation Quest (F-QUEST-001) will be saved in the general folder for the applicable client.

Doc No: WP-QUOTE-01
Version No: 011
Date Reviewed: December 2023



PREPARATION OF QUOTATIONS

- New quotations will be generated for all recertification clients, Pre-Client Review and Quote Calculation Sheet (F-PCR-001, F-PCR-002, F-PCR-003 or F-PCR-004) will be completed, this is to ensure customer details, staff compliment and scope of supply is still relevant. F-QUEST-001 is NOT required for recertification clients.

Contract Review

Upon the receiving of an enquiry the EMD or Financial Director will make a decision if the company has the ability to do the audit.

A quotation will be supplied on this basis. If the client accepts the quotation a further contract review will be carried out. This will allow us to verify that all information is correct, any cost issues are resolved, and that the auditor is available to perform the services required.

In the event that the scope of the contract changes or a client applies for an extension of scope or certification, then F-Quest-001 will need to be completed by the client and sent to Sancert for review.

This form will be used to recalculate the total man hours needed taking into consideration the possible current ISO certification as well as duplicated clauses. A new calculation form will be used, and a new SLA supplied to the client for acceptance.

The pre client review and quote calculation forms are PCR001, 002, 003 and 004.

Doc No: WP-QUOTE-01
Version No: 011
Date Reviewed: December 2023