



## Provide Goods and Services

Occupational  
Standard Title

### SET AND COMMUNICATE FEES, PRICES, AND TERMS OF BUSINESS

#### Overview

This standard is about how to set fair fees, prices and terms and conditions that comply with relevant legislation and regulation. Whilst services and sales must represent good and fair value to the client, the Equine Fitter must ensure a sustainable business model by setting fees and prices that cover costs and allow investment in tools, stock, and education and provide, at minimum, a living wage.

You may also refer to:

- EFCC01 Coach client to monitor and maintain safe and correct fit of saddlery and lorinery
- EFCC02 Discuss fitting approach and likely outcomes and make referrals
- EFCGS01 Manage appointments and deliver customer service
- INSCS026 Monitor and solve customer service problems
- EFCGS03 Maintain appropriate stock, tools, and supplier relationships



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### Performance Criteria

You must be able to:

- P01 Factor in all costs of providing Equine Fitting goods and services, including taxes, travel, and administration costs
- P02 Analyse the local and wider market to understand fees and prices charged in the same and adjoining industries
- P03 Understand, calculate, and apply profit margin to goods sales
- P04 Carry out financial calculations
- P05 Be able to negotiate fees and prices
- P06 Be confident of the value of the service and goods you supply
- P07 Know, understand, and abide by current legislation covering the sale and supply of goods and services in the country of operation



## Provide Goods and Services

### Knowledge and understanding

#### Calculate the cost of doing business

You need to know and understand

K01	Start-up and running costs for your business
K02	How to account for your expert knowledge and time

#### Set fees, prices, and offers

You need to know and understand

K03	The fees and prices charged by your competition and by similar professionals
Scope and range	<ul style="list-style-type: none"> <li>• The fees set per hour, per horse, or per service</li> <li>• Whether prices meet, undercut, or exceed recommended retail prices</li> </ul>
K04	Set fees for services and prices for the sale of goods to provide an attractive and fair offering
Scope and range	<ul style="list-style-type: none"> <li>• Calculate how much you should charge to cover your costs and to provide a living wage             <ul style="list-style-type: none"> <li>◦ Decide where to place yourself in relation to the market you wish to capture, e.g., affordable or exclusive, and to other practitioners</li> </ul> </li> <li>• Decide if you will discount fees or prices             <ul style="list-style-type: none"> <li>◦ The expected balance of income from fees versus sales and impact on income should that change</li> <li>◦ How might your business model reflect ethical considerations</li> </ul> </li> <li>• Keep records of outgoings and income to calculate and track your wage</li> </ul>
K05	When and how much to charge for travel
Scope and range	<ul style="list-style-type: none"> <li>• Decide how to charge for travel             <ul style="list-style-type: none"> <li>◦ Fuel used, wear and tear, other expenses such as purchase and upkeep</li> </ul> </li> </ul>



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- Approved mileage and fuel allowance rates set by government, applicable to the travel period
- When discounts may be applied

### Communicate fees, prices, and offers

You need to know and understand

<b>K06</b>	Communicate fees and prices
Scope and range	<ul style="list-style-type: none"> <li>● List fees and prices clearly on your website and any marketing material</li> <li>● Do not knowingly mislead</li> <li>● Communicate set and variable costs to clients when making an appointment and again before carrying out any chargeable work or completing any transaction</li> <li>● Gain and record agreement to fees, prices, and terms before providing goods or services</li> </ul>
<b>K07</b>	Advertise promotions, offers or discounts
Scope and range	<ul style="list-style-type: none"> <li>● Set and adhere to terms offered</li> <li>● Make it clear where terms vary               <ul style="list-style-type: none"> <li>○ For types of clients</li> <li>○ When advertised in a specific publication</li> <li>○ For different services or products</li> </ul> </li> </ul>

### Take and process payments

You need to know and understand

<b>K08</b>	How payment may be taken, charges incurred, and how you prefer to take payment
Scope and range	<ul style="list-style-type: none"> <li>● Convenient and secure methods of taking payment</li> <li>● Where you have a preference, or are limited to certain methods of payment, make this clear</li> </ul>
<b>K09</b>	Keep full and accurate records of all transactions
Scope and range	<ul style="list-style-type: none"> <li>● Complete an invoice and issue to your client for agreement and signature, where applicable</li> </ul>



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- Give a copy to your client and retain a copy for your records
- Issue or make available your terms and conditions and when and how the client is understood to have agreed to them

### Operate in accordance with legislation, regulation, and codes of practice

You need to know and understand

K10	Relevant and current legislation
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| Scope and range | <ul style="list-style-type: none"> <li>• Know and understand consumer protection legislation</li> <li>• Have and operate a complaints procedure</li> <li>• Know and understand and operate within animal welfare legislation</li> </ul> |
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## Provide Goods and Services

Developed by	The Equine Fitters Council Working Group
Comments	
Version number	1
Date approved	-
Indicative review date	January 2028
Validity	Current
Status	Published
Originating organisation	The Equine Fitters Council Working Group
Original URN	EFCGS02
Relevant Occupations	Saddle Fitter, Bridle Fitter, Bit Fitter, Harness Maker, Equine Fitter
Keywords	Fees, services, prices, goods, products, terms, conditions



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