Unit Title:	**Principles of selling in a contact centre**
OCR unit number	7
Sector unit number:	CCTC8
Level:	2
Credit value:	2
Guided learning hours:	14
Unit reference number:	M/503/0386

Unit purpose and aim

This unit concerns knowing the process of selling in a contact centre, understanding the use of information for sales activities and how to make sales through a contact centre.

Learning Outcomes	Assessment Criteria	Teaching Content

The Learner will:
1 Know the process of selling in a contact centre
	The Learner can:
	1.1 Describe procedures for greeting and identifying customers, authorising payment and closing and recording customer contacts
		Candidates should have an understanding of:
		• procedures including
		  - call answering targets
		  - call opening i.e. company name, own name and department
		  - authorisation of caller identify and validating requests
		  - payment authorisation
		  - call closing i.e. confirm customer requirements have been met, agree future action, confirm any timescales, provide contact details
		  - logging customer information i.e. written or electronic

	1.2 Describe the regulatory requirements for selling to customers	• regulatory requirements including
		  - Data Protection Act
		  - Financial Services Act
		  - Distance Selling Regulations
		  - consumer protection legislation
		  - PCI Data Standards Regulations

Learning Outcomes	Assessment Criteria	Teaching Content
	1.3 Describe what is meant by a "service offer"	- a 'service offer' including - the products or services - price - competitors service offer - limitations i.e. financial, resources, availability, accessibility
	1.4 Describe how the service offer is communicated to customers	- how the service offer is communicated by - individual employees - by the organisation - electronically i.e. SMS, IVM, website, emails, e-bulletins/newsletters - other mediums i.e. newspapers/magazines, leaflets, television
2 Understand the use of information for sales activities in a contact centre	2.1 Describe the information needed about products and/or services to support sales activities	Candidates should have an understanding of: - information needed including - features and benefits - price and/or discount - availability - delivery timescale - returns policy and procedures - guarantees/warranties - after sales support
	2.2 Explain how to obtain sufficient information from customers to enable a sale	- how to obtaining sufficient information by - using questioning techniques to identify the need - matching needs to product or service - listening to and overcoming objections - closing the sale
	2.3 Explain the link between product and/or service and customer information and sales opportunities	the link being the ability to match customer needs and expectations to a product or service
	2.4 Explain how to find new customers for products and/or services	- how to find new customers by - recommendation of an existing customer - advertising - promotional activity

Learning Outcomes	Assessment Criteria	Teaching Content
3 Understand how to make sales through a contact centre	3.1 Describe the purpose of explaining to customers the features and benefits of products and/or services offered or supported	Candidates should have an understanding of: • the purpose of explaining including - to match the customer needs to the correct product or service

	3.2 Explain why it is important to identify and confirm customers' needs	• the importance including
		  - to address their needs
		  - to other alternative or additional products and services

	3.3 Explain how to make matches to products and/or services from information provided by customers	• how to match products or services including
		  - questioning techniques i.e. open, closed, probing
		  - active listening skills
		  - overcoming barriers e.g. language, ethnicity, culture

	3.4 Explain the importance of informing customers of what is happening and the reasons for any constraints or limitations	• the importance of keeping customers informed including
		  - to meet their expectations
		  - maintain the company image
		  - reduce complaints
		  - limitations and constraints e.g. to own authority, to balancing the needs of the organisation and the customer, financial, resources

	3.5 Explain the techniques for establishing a rapport with customers	• techniques for establishing rapport including
		  - verbal e.g. tone, intonation, feedback, positive and negative language
		  - non-verbal e.g. smiling while talking, body language, hearing and listening
		  - empathy

Learning Outcomes	Assessment Criteria	Teaching Content
	3.6 Explain how to up-sell and cross-sell	- how to up-sell and cross-sell including - offering products or services to provide additional value - offering products or services to extend the use of the original - offering products or services to extend the life of the original

Assessment

This unit is internally assessed by centre staff (e.g. teachers/tutors, support workers, carers, assessors) and externally verified by OCR.

Guidance on assessment and evidence requirements

Please refer to the OCR Centre Handbook available from the OCR website www.ocr.org.uk.

You should refer to the '*Admin Guide: Vocational Qualifications* (A850)' for *Notes on Preventing Computer-Assisted Malpractice*.

National Occupational Standards (NOS) mapping/signposting

Occupational standards	Unit number	Title
Contact centre	19	Carry out direct sales activities
Contact centre	31	Provide support through a contact centre for specified services and/or products

Functional skills signposting

Training provided for contact centre operations may help to prepare candidates for the functional skills assessment (e.g. report writing may be good preparation for English). It is likely however that further training would be needed to fully prepare candidates for functional skills assessment.

Functional Skills Standards					
English		**Mathematics**		**ICT**	
Speaking and Listening		Representing		Use ICT systems	
Reading		Analysing		Find and select information	
Writing		Interpreting		Develop, present and communicate information	

Resources

OCR evidence sheets have been produced to support candidates in producing appropriate evidence for these qualifications. Centres may choose to:

- tailor these for candidates

- use these as a benchmark for devising their own evidence sheets to aid candidates

Candidate evidence checklists can be found in the Contact Centre Operations section containing on the OCR website: http://www.ocr.org.uk.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document *'Admin Guide: Vocational Qualifications' (A850)* on the OCR website www.ocr.org.uk.