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| Unit Title: | Manage direct sales operations in a contact centre |
| OCR unit number | 11 |
| Sector unit number: | CC22 |
| Level: | 5 |
| Credit value: | 7 |
| Guided learning hours: | 30 |
| Unit reference number: | Y/503/0401 |

Unit purpose and aim

This unit concerns being able to contribute to the development of organisational sales strategy in a contact centre, develop procedures and guidelines to be used for direct sales, review sales planning, analysis and reporting techniques for direct sales and understand the principles underpinning direct sales activities in a contact centre.

| Learning Outcomes | Assessment Criteria | Teaching Content |
|---|---|--|
| The Learner will: 1 Be able to contribute to the development of organisational sales strategy in a contact centre | The Learner can: 1.1 Identify the features of organisational sales strategy that have an impact on direct sales operations 1.2 Recommend developments to the sales strategy that are capable of enhancing sales performance | This may include an understanding of: <ul style="list-style-type: none"> • The objectives which are highest priority • Ways of evaluating the sales strategy and highlighting any areas for development |
| 2 Be able to develop procedures and guidelines to be used for direct sales through a contact centre | 2.1 Assess the importance of sales information that is needed to achieve the sales objectives 2.2 Confirm that the required sales information can be collected with minimum disruption to sales activities 2.3 Define the sales style and techniques to be used to achieve direct sales objectives 2.4 Confirm the fitness for purpose of the draft procedures and guidelines through a test and trial | This may include an understanding of: <ul style="list-style-type: none"> • The information and statistics that need to be available. • How to check whether the current reporting system provides the required information • Non-invasive ways of enhancing the system • The ways to user test any new procedures prior to full implementation |

| Learning Outcomes | Assessment Criteria | Teaching Content |
|--|--|---|
| <p>3 Be able to review sales planning, analysis and reporting techniques for direct sales through a contact centre</p> | <p>3.1 Review current sales plans and methods of devising them from an analysis of customer, market and sales information against agreed criteria</p> <p>3.2 Identify the actions needed to achieve sales objectives and plans</p> <p>3.3 Design sales analysis tools that are capable of monitoring sales and enhancing performance</p> <p>3.4 Implement the agreed actions to enhance performance in accordance with the sales plan</p> <p>3.5 Define sales reporting requirements that are capable of capturing the required monitoring and sales performance information</p> | <p>This may include an understanding of:</p> <ul style="list-style-type: none"> • The importance of continual improvement and ways of implementing this • The various sales analysis methods that apply to direct sales • The data that needs to be captured to enable full and detailed reviews to be carried out |
| <p>4 Understand the principles underpinning direct sales activities in a contact centre</p> | <p>4.1 Evaluate the strategic implications of the range of products and/or services covered by contact centre direct sales</p> <p>4.2 Evaluate current organisational approaches and systems for direct sales</p> <p>4.3 Evaluate the impact of regulation and legislation on direct sales operations</p> <p>4.4 Explain how to specify sales analysis requirements</p> <p>4.5 Evaluate the implications of the options for sales monitoring tools</p> <p>4.6 Evaluate how an organisational sales strategy drives direct sales operations</p> | <p>This may include an understanding of:</p> <ul style="list-style-type: none"> • The range of the organisation's products and services • The organisational regulations, professional codes of practice and legislation that apply to these products and services and to the way in which they are sold • The importance of the organisational sales strategy |

Assessment

This unit is centre assessed and externally verified. In order to achieve the unit you must produce a portfolio of evidence which, on request, will need to be made available to the OCR external verifier. Portfolios of work must be produced independently and Centres must confirm to OCR that the evidence is authentic. An OCR Centre Authentication form is provided in the Centre Handbook.

Evidence requirements

In order to achieve this unit you must demonstrate that you have met all of the stated learning outcomes and assessment criteria. Your assessor must be able to observe you in the workplace or you must provide tangible evidence of your real work activities.

You may collect evidence for the unit through work in a private sector organisation, a public sector organisation or a not-for-profit organisation.

You must provide evidence that shows you have done this over a sufficient period of time on different occasions for your assessor to be confident that you are competent.

You must provide evidence that you are able to manage and develop sales operations in a contact centre, using sales information to contribute to the development of sales procedures and strategies.

Guidance on assessment and evidence requirements

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

National Occupational Standards (NOS) mapping/signposting

| Occupational Standards | Unit Number | Title |
|------------------------|-------------|---|
| Contact Centre | 22 | Organise and manage direct sales activities in a contact centre |

Functional Skills signposting

This section indicates where candidates may have an opportunity to develop their functional skills

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

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|--|--|--|--|-------------|--|
| | | | | information | |
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Resources

Access to photocopier, PC and printer is desirable but not essential.

Access to sources of under-pinning knowledge such as websites, books, journals, etc, might be of help, but you are not expected to reproduce other people's written work.

Additional information

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