

<b>Unit Title:</b>	<b>Manage direct sales activities in a contact centre</b>
OCR unit number	9
Sector unit number:	CC21
Level:	4
Credit value:	6
Guided learning hours:	12
Unit reference number:	H/503/0398

### Unit purpose and aim

This unit concerns being able to review the use of sales information and sales techniques in a contact centre, develop plans for direct sales, develop individual and team sales performance and understand the management of sales activities in a contact centre.

Learning Outcomes	Assessment Criteria	Teaching Content
<p><b>The Learner will:</b></p> <p>1 Be able to review the use of sales information and sales techniques in a contact centre</p>	<p><b>The Learner can:</b></p> <p>1.1 Organise spot checks of how sales information is gathered and sales techniques are used in accordance with organisational guidelines</p> <p>1.2 Collate the results of sales monitoring processes to enable analysis</p> <p>1.3 Identify possible enhancements to customer information collection and/or sales techniques</p>	<p>This may include an understanding of:</p> <ul style="list-style-type: none"> <li>• The sales recording and monitoring systems</li> <li>• Methods of processing and evaluating statistics</li> <li>• How to identify any shortfalls in the data and ways to remedy this</li> </ul>
<p>2 Be able to develop plans for direct sales in a contact centre</p>	<p>2.1 Identify sales patterns and trends from an analysis of sales data</p> <p>2.2 Identify areas for enhancement in sales activities from an analysis of sales data</p> <p>2.3 Report the findings of the analysis to colleagues in the agreed format</p> <p>2.4 Identify actions to be undertaken including allocating roles and responsibilities</p>	<p>This may include an understanding of:</p> <ul style="list-style-type: none"> <li>• The forecasted patterns and trends</li> <li>• Ways to identify variations to the forecast</li> <li>• The organisational reporting system and structure</li> <li>• The organisational procedures for implementing changes to systems and procedures</li> </ul>

Learning Outcomes	Assessment Criteria	Teaching Content
	2.5 Implement the agreed plans to enhance sales performance in accordance with organisational procedures	
3 Be able to develop individual and team sales performance in a contact centre	3.1 Identify collective skills needs for direct sales from an analysis of sales data 3.2 Identify team members' existing skills and knowledge from an analysis of sales data 3.3 Identify team members' development needs from an analysis of sales data 3.4 Agree personal and team development plans that are commensurate with the analysis 3.5 Implement the agreed actions in accordance with the team and individual development plans	This may include an understanding of: <ul style="list-style-type: none"> <li>• The knowledge and skills needed for direct sales of the organisations products</li> <li>• The organisation's procedures for reviewing individual and team performance</li> </ul>
4 Understand the management of sales activities in a contact centre	4.1 Evaluate the impact of regulations and legislation on the management of sales activities through contact centres 4.2 Evaluate the components of a sales plan against agreed criteria 4.3 Explain how to create and implement team and individual development plans for sales skills in a contact centre	This may include an understanding of: <ul style="list-style-type: none"> <li>• Legislation, professional codes of practice and organisational regulations relating to the sale of the products</li> <li>• The organisation's systems for personal development planning and reviews</li> </ul>

## 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 a sales team in a contact centre, analysing sales information to develop sales plans and individual and team performance.

## Guidance on assessment and evidence requirements

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Please refer to the OCR Centre Handbook available from the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)

## National Occupational Standards (NOS) mapping/signposting

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Occupational Standards	Unit Number	Title
Contact Centre	21	Monitor and oversee direct sales activities in a contact centre

## Functional Skills signposting

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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 information	

## Resources

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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

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