OCR
RECOGNISING ACHIEVEMENT

Unit Title:	**Principles of sales activities and customer support in a contact centre**

OCR unit number   9

Sector unit number: CCTC10

Level: 3

Credit value: 4

Guided learning hours: 24

Unit reference number: J/503/0393

Unit purpose and aim

This unit concerns understanding the process of selling in a contact centre, the use of contact centre sales data, how to lead a sales team in a contact centre and customer complaints and non-compliance issues in a contact centre.

Learning Outcomes	Assessment Criteria	Teaching Content

The Learner will:
1 Understand the process of selling in a contact centre
	The Learner can:
	1.1 Explain the information needed to prepare for sales activities
		Candidates should have an understanding of:
		• information needs including
		  - purpose of the activity and associated targets
		  - features, benefits and options for the products and/or services
		  - marketing data i.e. demographics, sales trends, customer profiles
		• sales activities including
		  - retention of existing customers
		  - acquisition of new customers
		  - special offers and promotions i.e. new product and/or service, seasonal, discounts

	1.2 Describe the purpose of explaining to customers the features and benefits of products and/or services offered or supported	• the purpose of explaining features and benefits
		  - to meet customer needs and expectations
		  - to cross sell and up sell

Learning Outcomes	Assessment Criteria	Teaching Content
	1.3 Describe the impact of legislation on selling	- legislation including - Data Protection Act - Financial Services Act - Distance Selling Regulations - consumer protection legislation - PCI Data Standards Regulations - specific to the sector
	1.4 Explain how to offer options to customers by linking wishes and needs to products and/or services	how to offer options by matching wishes and needs to features and benefits of the products and/or services available
	1.5 Explain techniques to adapt sales styles to mirror customers' behaviour	1.5 & 1.6 techniques including - questioning techniques i.e. open, closed, probing - active listening skills - overcoming barriers e.g. language, jargon, ethnicity, culture - body language i.e. smiling while on the call
	1.6 Explain techniques for overcoming customers' objections and questions	
	1.7 Explain techniques for closing the sale	- techniques include identifying - negotiable issues - non negotiable issues
	1.8 Explain techniques for up-selling and cross-selling	- techniques 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
	1.9 Describe procedures for authorisation of payment and recording customers' orders	- procedures including - PCI Data Standards Regulations - organisational requirements

Learning Outcomes	Assessment Criteria	Teaching Content

2 Understand the use of contact centre sales data	2.1 Explain how sales data should be collated to enable data manipulation	Candidates should have an understanding of:
		• how to collate sales data may include
		  - numerically
		  - alphabetically
		  - alphanumerically

	2.2 Describe current market and customer trends	• current market and customer trends including
		  - competitor activity
		  - type of products and/or services purchased
		  - daily/weekly peaks and troughs in call activity
		  - requests for call backs/additional information

	2.3 Explain analysis techniques to compare performance against benchmarks	• analysis techniques including comparison of
		  - team sales against target
		  - individuals sales against target

	2.4 Explain how the results will be used to inform sales plans	• the use will include to forecast future activity and adjust targets

3 Understand how to lead a sales team in a contact centre	3.1 Explain how to identify sales activities that are capable of fulfilling a sales plan	Candidates should have an understanding of:
		• identification of sales opportunities such as
		  - setting criteria for outbound contacts
		  - sales information reports

	3.2 Explain how to set stretching but realistic and achievable targets	• setting of stretching targets including
		  - the use of SMART objectives
		  - consideration of individual skills sets

	3.3 Explain how to monitor team performance toward targets	• how to monitor will include basic analysis of sales performance information against individual and team targets

Learning Outcomes	Assessment Criteria	Teaching Content
	3.4 Explain how to identify opportunities for improving sales performance	• how to identify opportunities including • analysis - sales performance - customer feedback - complaints records - call monitoring • informal - own observations - peer observations and feedback
	3.5 Explain how advice and support for colleagues increases their understanding of sales-related requirements	• how advice and support increases colleagues understanding of sales requirements is through raising awareness of the importance of achieving sales to meet organisational goals and objectives
	3.6 Explain the importance of setting a good example and encouraging colleagues	• the importance in relation to leadership and setting a benchmark
4 Understand customer complaints and non-compliance issues in a contact centre	4.1 Describe the stages for dealing with customer complaints	Candidates should have an understanding of: • that the stages are - acknowledge - take ownership - identify options for resolving - agree a resolution - action the resolution - follow up to ensure the customer is satisfied
	4.2 Explain what constitutes non-compliance with legal and regulatory requirements	• non-compliance is the failure of an individual or an organisation to adhere to requirements and codes of practice.
	4.3 Explain the implications of non-compliance with legal and regulatory requirements	• the implications including • to the business - fine and/or prosecution - loss of business - damage to image/brand • to the individual - fine and/or prosecution - loss of employment

Learning Outcomes	Assessment Criteria	Teaching Content
	4.4 Explain the importance of complying with breaches of service offers and the impact of non-compliance	• the impact including - loss of business - damage of image/brand
	4.5 Explain the impact of non-compliance with a service offer	

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	20	Lead direct sales activities in a contact centre team
Contact centre	32	Support customers and colleagues when providing contact centre services

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.