

Unit Title:	Carry out direct sales activities in a contact centre
OCR unit number	7
Sector unit number:	CC19
Level:	2
Credit value:	5
Guided learning hours:	15
Unit reference number:	L/503/0394

Unit purpose and aim

This unit concerns being able to gather information needed for direct sales activities in a contact centre, carry out direct sales to customers, keep direct sales records, comply with regulations and legislation during direct sales and understand how to conduct sales activities in a contact centre.

Learning Outcomes	Assessment Criteria	Teaching Content
<p>The Learner will:</p> <p>1 Be able to gather information needed for direct sales activities in a contact centre</p>	<p>The Learner can:</p> <p>1.1 Assemble information about products and/or services that support direct sales</p> <p>1.2 Obtain from customers sufficient information to support direct sales activities</p> <p>1.3 Create sales opportunities by making links between information provided by customers and products and/or services</p> <p>1.4 Find potential new customers for products and/or services</p>	<p>The Learner may include:</p> <ul style="list-style-type: none"> • The products and services to be sold • The features and benefits of each • The information available about the products and services and how to access it • Questioning techniques to obtain relevant information from customers • How a customer's actual and potential needs are identified • How additional products and services are introduced to customers • Customer buying signals and how to recognise them • Records of sales made to customers • Records of "cold calls" to potential customers and the outcomes

Learning Outcomes	Assessment Criteria	Teaching Content
<p>2 Be able to carry out direct sales to customers through a contact centre</p>	<p>2.1 Establish customers' identity in accordance with organisational procedures</p> <p>2.2 Check customers' wishes and needs</p> <p>2.3 Identify possible matches with products and/or services from information provided by customers</p> <p>2.4 Explain to customers the features and benefits of products and/or services for sale</p> <p>2.5 Adapt their sales approach and style to meet customer preferences</p> <p>2.6 Maximise opportunities for cross-selling and up-selling</p> <p>2.7 Complete the authorisation or payment in accordance with organisational procedures</p>	<ul style="list-style-type: none"> • Company procedure for checking the customer's identity – e.g. additional security questions • How to confirm the customers requirements – eg summarising • Characteristics of different types of customer – e.g. age range; culture; language; individual needs • The links between customer type and the products and services to be sold • Verbal communication skills – adapting language to suit the needs of the customer • Descriptions of products and services in terms that are likely to appeal to different types of customer • Different ways of dealing with customers to maintain contact and interest • The links between the products and service being sold; how they relate to each other • The increased benefits to the customer of additional and related purchases • How potential additional purchases are introduced to the customer • Records of additional sales made • Records of completed transactions
<p>3 Be able to keep direct sales records within a contact centre</p>	<p>3.1 Identify the information about customers, products and/or services that should be recorded during the sales process</p> <p>3.2 Record customer, product and/or service information in accordance with organisational procedures</p>	<ul style="list-style-type: none"> • The information held and how to access it • Company procedures for recording information • Records created/updated in line with company policy

Learning Outcomes	Assessment Criteria	Teaching Content
<p>4 Be able to comply with regulations and legislation during direct sales in a contact centre</p>	<p>4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre</p> <p>4.2 Ensure compliance with regulations during direct selling through a contact centre</p>	<ul style="list-style-type: none"> • What the legal requirements are – e.g. consumer rights; data protection; others • What the regulatory requirements are – e.g. industry codes of practice • Records of compliant sales made
<p>5 Understand how to conduct sales activities in a contact centre</p>	<p>5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre</p> <p>5.2 Describe the organisational policies and procedures for direct sales through a contact centre</p> <p>5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities</p> <p>5.4 Describe the common objections and questions raised by customers during direct selling</p> <p>5.5 Explain how to identify cross-selling and up-selling opportunities</p> <p>5.6 Describe different methods of researching potential new customers</p> <p>5.7 Explain how to retrieve information from organisational sales records</p> <p>5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling</p>	<ul style="list-style-type: none"> • The products and services offered by the company • The features and benefits of each • The difference between a feature and a benefit • Company procedure for recording customer information, sales records and transactions • What the legal requirements are – e.g. consumer rights; data protection; others • What the regulatory requirements are – e.g. industry codes of practice • The information customers are likely to require and why • Objection handling techniques – how and when to use them • The links between the products and services being sold; how they relate to each other • The increased benefits to the customer of additional and related purchases • How to introduce potential additional purchase to the customer • Target markets and customer demographics • How information is stored and how to access it • What the company procedure is for ensuring compliance with legal/regulatory requirements – how this is monitored and checked

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 make sales to customers through contact centre activities, collecting and utilising sales information.

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	19	Carry out 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 information	

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).

DRAFT