Unit Title:	**Lead direct sales activities in a contact centre team**
OCR unit number	31
Sector unit number:	CC20
Level:	3
Credit value:	4
Guided learning hours:	8
Unit reference number:	D/503/0397

Unit purpose and aim

This unit concerns being able to carry out sales activities in a contact centre, analyse contact centre sales data, lead a team involved in direct sales activities and understand sales activities in a contact centre team.

Learning Outcomes	Assessment Criteria	Teaching Content
The Learner will:	**The Learner can:**	The Learner may include:
1 Be able to carry out sales activities in a contact centre	1.1 Prepare for a direct sales activity in accordance with organisational procedures 1.2 Establish customer wishes and needs 1.3 Offer options to customers by linking their wishes and needs to products and/or services 1.4 Adapt their sales style and techniques to mirror customer wishes and behaviour 1.5 Close the sale by agreement with the customer during the customer contact 1.6 Record the confirmed order in accordance with organisational procedures 1.7 Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre 1.8 Complete the authorisation or payment in accordance with organisational procedures	• the information required prior to contacting a customer and how to access it • how to open a contact with the customer • questioning techniques to identify customer needs – eg open questions, probing questions • active listening – picking up signals and clues from the customer • different types of customer – e.g. age range; culture; language; individual needs • the links between products and services offered and different types of customer • recognising buying styles and adapting sales technique accordingly • process of closing a sale and the follow up action required • records of sales made in line with company policy, legal and regulatory

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Learning Outcomes	Assessment Criteria	Teaching Content
		requirements – e.g. consumer rights; data protection; industry codes of practice • records of transactions completed in line with company policy
2 Be able to analyse contact centre sales data	2.1 Collate sales data from direct sales activities in a format that enables data manipulation 2.2 Analyse sales performance against market and customer trends 2.3 Summarise the results of the sales analysis to enable the formulation of a sales plan	• the data available and how to access it • the target market and its current state • customer base and demographics • company sales targets • interpretation of sales data and comparison to sales targets • the trends and indicators relevant to market segment • records of data analysed and conclusions drawn - e.g. reports produced, records of meetings
3 Be able to lead a team involved in direct sales activities in a contact centre	3.1 Identify sales activities which are capable of fulfilling the sales plan 3.2 Agree realistic and achievable team sales targets including cross-selling and up-selling 3.3 Monitor the team's sales performance against agreed targets 3.4 Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach 3.5 Provide encouragement and guidance to team colleagues during sales activities	• records of SMART targets agreed with team members – e.g. appraisals, 1-2-1s, performance reviews • systems used to measure performance against agreed targets • records of sales monitoring and action taken to improve performance – e.g. coaching, on-the-job training, off-the-job training • records of feedback to team members on performance issues • examples of advice given to team members to improve sales
4 Understand sales activities in a contact centre team	4.1 Explain the features and benefits of the products and/or services offered or supported by the contact centre 4.2 Explain the organisational and regulatory requirements of direct	• the products and services offered by the company • the features and benefits of each • the difference between a feature and a benefit • what the legal requirements are – e.g. consumer rights;

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Learning Outcomes	Assessment Criteria	Teaching Content
	sales activities 4.3 Explain the techniques for overcoming objections and questions from customers during sales activities 4.4 Explain the importance of adapting their style and approach to mirror customers' style and perspective 4.5 Explain the importance of setting a good example in a contact centre team 4.6 Explain how to set sales targets including cross-selling and up-selling	data protection; equality • what the regulatory requirements are – e.g. industry codes of practice • objection handling techniques – when and how to use them • how and why customers buy • recognising buying signals • recognising customer buying style and adapting sales approach accordingly • what leading by example means in practice and how this is done • what company sales targets are and how to distribute them fairly and effectively across the team • what SMART targets are and how to obtain team agreement to them

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 lead sales activities in a contact centre, analysing and reporting on sales information.

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Guidance on assessment and evidence requirements

Evidence may come from a number of different sources, for example:

- performance evidence may come from a candidate carrying out workplace activities
- knowledge evidence may come from a candidate carrying out workplace activities or from the candidate answering the assessor's questions

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

The mapping in the table below provides an indication of where evidence might be available for assessment against some of the knowledge and understanding contained in the national occupational standards (NOS). It does not claim to guarantee that evidence will meet the NOS.

Occupational Standards	**Unit Number**	**Title**
Contact Centre	20	Lead 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

Stationery or a CD-rom.

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.

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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.