

National Unit Specification: general information

UNIT Contact Centre Skills: Selling Skills (Intermediate 1)

CODE DN8K 10

COURSE

SUMMARY

This unit is designed to develop the candidate's ability to undertake routine contact centre sales activities. On completion of this unit, candidates will be able to use telephone sales techniques in offering a product or service appropriate to customer needs.

OUTCOMES

1. Gather information to identify customer needs
2. Promote specified products and services
3. Use sales techniques appropriate to customer needs
4. Evaluate own sales performance

RECOMMENDED ENTRY

While entry is at the discretion of the centre, candidates would normally be expected to have evidence of skills in Communication and Numeracy.

CREDIT VALUE

1 credit at Intermediate 1 (6 SCQF credit points at SCQF level 4*)

**SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from Access 1 to Doctorates.*

Administrative Information

Superclass: BE

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National Unit Specification: general information (cont)

UNIT Contact Centre Skills: Selling Skills (Intermediate 1)

CORE SKILLS

There is no automatic certification of core skills or core skills components.

National Unit Specification: statement of standards

UNIT Contact Centre Skills: Selling Skills (Intermediate 1)

Acceptable performance in this Unit will be the satisfactory achievement of the standards set out in this part of the Unit Specification. All sections of the statement of standards are mandatory and cannot be altered without reference to the Scottish Qualifications Authority.

OUTCOME 1

Gather Information to identify customer needs

Performance Criteria

- (a) Comply with organisational procedures.
- (b) Use specified information gathering tools.
- (c) Collect information to identify customer needs.
- (d) Record information accurately.

Evidence Requirements

Performance evidence that the candidate can meet the standards defined by the performance criteria by applying specified information gathering techniques for a minimum of four customers.

Evidence will be in the form of an observation checklist supported by electronic data records.

OUTCOME 2

Promote specified products and services

Performance Criteria

- (a) Identify opportunities to up/cross sell.
- (b) Identify appropriate products and services.
- (c) Match products and services to customer requirements.
- (d) Describe benefits of products and services.

Evidence Requirements

Performance evidence that the candidate can meet the standards defined by the performance criteria by promoting one product and one service, each to a minimum of two customers.

Evidence will be in the form of an observation checklist supported by electronic data records.

OUTCOME 3

Use sales techniques appropriate to customer needs

Performance Criteria

- (a) Use specified sales procedures.
- (b) Respond appropriately to customer questions.
- (c) Respond appropriately to customer objections.
- (d) Adapt tone and style to meet customer needs.

National Unit Specification: statement of standards (cont)

UNIT Contact Centre Skills: Selling Skills (Intermediate 1)

Evidence Requirements

Performance evidence that the candidate can meet the standards defined by the performance criteria by providing appropriate service delivery to a minimum of four customers.

Evidence will be in the form of an observation checklist supported by electronic data records.

OUTCOME 4

Evaluate own sales performance

Performance Criteria

- (a) Monitor on-going performance against targets.
- (b) Identify personal strengths and development needs.
- (c) Plan personal development for future sales activities.

Evidence Requirements

Performance evidence that the candidate can meet the standards defined by the performance criteria. Evidence will be in the form of a personal interview supported by electronic and written records.

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National Unit Specification: support notes

UNIT Contact Centre Skills: Selling Skills (Intermediate 1)

This part of the Unit Specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

GUIDANCE ON THE CONTENT AND CONTEXT FOR THIS UNIT

The Unit has been identified as one of six Units which will contribute towards a Scottish Progression Award in Contact Centre Skills.

GUIDANCE ON LEARNING AND TEACHING APPROACHES FOR THIS UNIT

If this Unit is delivered as part of a group award, it is recommended that it should be taught and assessed within the subject area of the group award to which it contributes.

Some simulation in a training context could be useful, in order to focus on organisational systems, procedures and on the requirements of relevant aspects of the following:

- ◆ The Data Protection Act
- ◆ Distance Selling Regulations
- ◆ the requirements of the Direct Marketing Association

Candidates could also be directed to appropriate websites to support online learning.

Outcome 1

Candidates should be involved gathering specified information related to sales. Candidates should be able to capture specified customer information and enter data following the organisational procedures, designed to meet relevant legislation and regulations.

Outcomes 2 and 3

Training will be needed in the use of approved and pre-prepared organisational procedures for routine selling additional associated products or services, or those which are more expensive such as, for example, insurance extras or value added offers. Routine selling could involve working to scripts, using approved closed and open questions, and following on screen procedures. Sufficient background knowledge, and therefore some training, will be needed on the full range of products or services which would be on offer. There are opportunities for integration with other units in the award, possibly in the context of a product campaign

Role plays and training videos could be used to demonstrate the importance of a calm response to customer objections and resistance, and the contribution of tone and style to closing the transaction. The focus of competence is demonstrating persistence and an ability to handle and guide the customer smoothly through the process. Realistic targets should be set, although achieving a sale is an aim, but not a requirement of the Outcomes.

National Unit Specification: support notes (cont)

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Outcome 4

A personal interview between candidate and assessor should take a supportive approach to examining sales techniques and negotiating a personal development plan, which could be completed by the assessor but should be signed by the candidate. Development may include further training suggestions. There are opportunities for integration with Outcome 3 or 4 of Contact Centre Skills: Personal and Organisational Effectiveness

GUIDANCE ON APPROACHES TO ASSESSMENT FOR THIS UNIT

For all assessments:

- ◆ the assessment of performance should be as natural and efficient as possible and therefore some evidence of competence should come from assessors and/or others acting as ‘expert witnesses’. Detailed observation checklists, witness testimony and peer and self assessment may all provide appropriate performance evidence
- ◆ written evidence should arise naturally from tasks and activities appropriate to the workplace, such as copies of electronic files, work logs, e-mail, contact reports and job sheets.
- ◆ ephemeral evidence, for example of decision taking, could be cross checked by oral questioning and backed up by brief written evidence – for example in the form of annotations to observation checklists

There are opportunities for integration with assessment of other units in the award. The use of simulation in a realistic workplace environment is acceptable where performance evidence in the workplace is unobtainable.

CANDIDATES WITH ADDITIONAL SUPPORT NEEDS

This Unit Specification is intended to ensure that there are no artificial barriers to learning or assessment. The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments or considering alternative Outcomes for Units. For information on these, please refer to the document *Guidance on Assessment Arrangements for Candidates with Disabilities and/or Additional Support Needs* (SQA, 2004).