

Overview

What this standard is about

Many contact centres carry out direct sales activities. These may be through inbound or outbound contacts and may or may not be the primary purpose of a particular contact. Sales processes may be basic and involve order-taking, routine involving a defined set of services or products or complex involving matching customer wishes or needs with any available service and/or product. Contact centre teamwork supports learning between colleagues especially in challenging areas such as sales. Sales plans are devised using available sales, market and customer information and are generally backed by targets agreed with team members.

Performance Criteria

You must be able to:

Carry out sales activities in a contact centre

- 1 Access customer and services or product information to prepare for direct sales activity in a contact centre.
- 2 Establish customer wishes and needs through questioning and active listening.
- 3 Link customer wishes and needs with available services and/or products to offer options.
- 4 Respond to customer questions and objections.
- 5 Adapt your selling style and technique to mirror customer wishes and behaviour.
- 6 Close the sale by agreement with your customer during customer contact.
- 7 Confirm and record your customer's order.
- 8 Ensure compliance with relevant regulation and legislation that impact on direct sales through a contact centre.

Carry out sales analysis leading to plans for sales activities

- 9 Assemble sales data collected through direct sales activities in a contact centre.
- 10 Analyse sales data against available market and customer data.
- 11 Analyse services and product data against customer, market and sales analysis.
- 12 Summarise results of sales analysis to form the basis for a sales plan.
- 13 Work with colleagues to agree sales actions designed to fulfil a sales plan.

Lead team direct sales activities in a contact centre

- 14 Lead team sales activities by setting up an example dealing with complex sales contacts in a contact centre.
- 15 Agree sales targets including cross-selling and up-selling with a contact centre team.
- 16 Work with colleagues to develop sales skills and techniques.
- 17 Monitor team sales performance against agreed targets.
- 18 Review contact centre team sales performance and approach to identify opportunities for improving sales performance.
- 19 Provide encouragement and guidance to team colleagues during sales activities.

Knowledge and Understanding

You need to know and understand:

- (a) Services and/or products available for sale through your contact centre and their features and benefits.
- (b) Regulations and legislation that impact on direct sales through a contact centre.
- (c) Sales processes and techniques used in your organisation for making direct sales.
- (d) Techniques for establishing wishes and needs when selling through a contact centre.
- (e) How to make effective links between customer wishes or needs and available services and/or products.
- (f) Techniques for overcoming objections and questions from customer during sales activities.
- (g) The importance of adapting your style and approach to mirror customer style and perspective.
- (h) Sources of sales data from direct selling through a contact centre.
- (i) Sources of market and customer data from direct selling through a contact centre.
- (j) How to analyse and summarise sales, market and customer data.
- (k) The importance of setting a good example in a contact centre team dealing with direct sales.
- (l) How to set sales targets including cross-selling and up-selling.
- (m) Ways to develop sales skills among colleagues in a contact centre team.
- (n) Ways to encourage and guide colleagues undertaking sales activities in a contact centre team.

H129 04 (CFACC20) Lead direct sales activities in a contact centre team

Evidence Requirements

To achieve this Unit you will need to ensure that your evidence covers all Performance Criteria and Knowledge and Understanding.

- 1 All evidence must be based on your performance at work.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 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.
- 4 You must show you have obtained, maintained, stored and used customer data according to:
 - ◆ organisational procedures
 - ◆ legislative and/or regulatory requirements.
- 5 You must provide evidence you have worked with the following groups:
 - ◆ team members or colleagues
 - ◆ supervisors, team leaders or managers.

Comments
Statement of competence
I confirm that all evidence (including Knowledge and Understanding), for the entire Unit has been met:
Candidate's signature _____ Date _____
Internal Verifier's signature _____ Date _____
Assessor's signature _____ Date _____ Date sampled (by IV) _____