

## **H12F 04 (CFACC21) Monitor and oversee direct sales activities in a contact centre**

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### **Overview**

#### **What this standard is about**

Many contact centres undertake 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 activities can be undertaken by any agent at different levels and with different experience. Basic, routine and complex sales involve different team members but all require organisational support and guidance. Sales information and sales techniques must be kept under constant review when monitoring reveals the need for change. Analysis and planning are part of the management process as well as the development of team skills and support for team members.

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#### **Performance Criteria**

*You must be able to:*

##### **Monitor and review sales information use and sales techniques in a contact centre**

- 1 Organise spot checks and routine monitoring of sales information gathering.
- 2 Organise spot checks and routine monitoring of sales techniques being used.
- 3 Collect and collate results of sales monitoring processes.
- 4 Review procedures for sales information collection in the light of monitoring data.
- 5 Review sales techniques in use in the light of monitoring data.
- 6 Identify possible improvements in customer information collection or sales techniques in use in the contact centre.
- 7 Implement actions to make improvements in customer information collection or sales techniques.

##### **Analyse sales and devise sales plans for direct sales in a contact centre**

- 8 Use sales information to analyse sales patterns and trends.
- 9 Review sales analysis to identify areas for improvement.
- 10 Report on sales analysis and review to inform and consult on opportunities for improvements.
- 11 Implement actions to improve sales performance based on sales analysis and review.
- 12 Identify the key elements and components of a sales plan for direct sales through a contact centre.
- 13 Create a sales plan for contact centre teams.

##### **Develop individual and team sales performance in a contact centre**

- 14 Review sales analysis and sales plans to identify skills needs for direct sales in a contact centre.
- 15 Review individual and team sales skills and performance against skills needs for teams and individuals.
- 16 Devise personal development plans to develop individual sales skills in contact centre staff.
- 17 Devise a team development plan to develop team sales skills in a contact centre.
- 18 Implement personal development plans to develop individual sales skills in a contact centre.
- 19 Implement a team development plan to develop team sales skills in a contact centre.

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### Knowledge and Understanding

*You need to know and understand:*

- (a) Features and benefits of available services and/or products that impact on the sales process.
- (b) Organisational policy and procedures on direct sales.
- (c) Regulations and legislation relevant to direct sales in a contact centre.
- (d) How to organise and carry out spot checks on sales processes.
- (e) How to organise and carry out routine checks on sales activities.
- (f) Techniques for collecting and collating results of sales monitoring processes.
- (g) Techniques for reviewing sales monitoring results and identifying options for action.
- (h) Sales analysis and reporting techniques to improve sales performance in a contact centre.
- (i) The key components of a sales plan.
- (j) How to create and implement a personal development plan for sales skills in a contact centre.
- (k) How to create and implement a team development plan for sales skills in a contact centre.

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### **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 were monitoring and overseeing direct sales activities over a sufficient period of time on different occasions for your assessor to be confident that you are competent.



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