

### Overview

#### What this standard is about

Many contact centres carry out direct sales activities. Some sales are the result of incoming contacts from customers. Other sales are the result of outgoing contacts made from the contact centre. Some sales opportunities result from general information and support exchanges with customers who then develop an interest in additional services or products. In any of these situations you must be familiar with the services and/or products that can be offered and with sales techniques that enable you to make the most of sales opportunities that arise.

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#### Performance Criteria

*You must be able to:*

##### **Gather and collate information needed for direct sales activities**

- 1 Assemble information about the services and/or products available through direct sales
- 2 Identify sources of additional information about services and/or products
- 3 Access customer information held by the contact centre which will support direct sales activities
- 4 Collect information from customers needed to complete a direct sale
- 5 Make links between customer information and services or product information to create sales opportunities
- 6 Research potential new customers

##### **Contribute to direct sales activities in a contact centre**

- 7 Identify services and/or products available for sale and their features and benefits.
- 8 Establish customer identity in order to access available customer information that will support the sales process.
- 9 Use information expressed by customers to identify possible matches with available services and/or products.
- 10 Explain features and benefits of services and/or products to customers.
- 11 Respond to customer questions and objections.
- 12 Adapt your sales approach and style to customer preferences.
- 13 Confirm customer wishes and needs in order to close the sale.
- 14 Identify and act on cross-selling and up-selling opportunities.

##### **Keep sales records relating to direct sales through a contact centre**

- 15 Identify information about customers and the services and/or products that should be recorded during the sales process.
- 16 Retrieve information as required from sales records.
- 17 Follow organisational procedures to record customer and service and/or product data during the sales process.
- 18 Use sales records to summarise information that supports the sales process.

##### **Comply with relevant regulations and legislation during direct sales in a contact centre**

- 19 Identify regulatory requirements which impact on direct sales activities through a contact centre.
- 20 Follow organisational procedures to ensure compliance with regulations during direct selling through a contact centre.

## **H11V 04 (CFACC19) Carry out direct sales activities in a contact centre**

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### **Knowledge and Understanding**

*You need to know and understand:*

- (a) Services and/or products that are available through direct sales.
- (b) Organisational policies and procedures for direct sales through contact centre dealings with customers.
- (c) Regulations and legislation that impact on direct sales through contact centres.
- (d) Sources of detailed information about services and/or products.
- (e) Techniques for linking customer wishes and needs with available services or products.
- (f) Features and benefits of services or products.
- (g) Common objections and questions raised by customers during direct selling.
- (h) How to identify cross-selling and up-selling opportunities.
- (i) Sales records in organisational procedures and how to maintain them.
- (j) How to retrieve information from organisational sales records.
- (k) Organisational procedures to ensure compliance with relevant regulation and legislation impacting on direct selling.
- (l) How to carry out research for potential new customers.

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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 have done this over a sufficient period of time with different customers 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.



<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> _____