Unit 321 Lead direct sales activities in a contact centre team

UAN:	**D/503/0397**
Level:	3
Credit value:	4
GLH:	8
Relationship to NOS:	This unit is linked to Contact Centre NOS 20.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by CFA, the Sector Skills Council for Administration
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 outcome
The learner will: 1. be able to carry out sales activities in a contact centre
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • product • professional discussion • questioning • reflective account • witness testimony • observation

Learning outcome
The learner will: 2. be able to analyse contact centre sales data
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • product • professional discussion • questioning • reflective account • witness testimony • observation

Learning outcome
The learner will: 3. be able to lead a team involved in direct sales activities in a contact centre
Assessment criteria
The learner can: 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.

Assessment Guidance

Evidence may be supplied by:

- product
- professional discussion
- questioning
- reflective account
- witness testimony
- observation

Learning outcome
The learner will: 4. understand sales activities in a contact centre team
Assessment criteria
The learner can: 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 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.

Assessment Guidance
Evidence may be supplied by: • reflective account • professional discussion • questioning.