Unit 502 Manage direct sales operations in a contact centre

UAN:	**Y/503/0401**
Level:	5
Credit value:	7
GLH:	30
Relationship to NOS:	This unit is linked to Contact Centre NOS 22.
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 contribute to the development of organisational sales strategy in a contact centre, develop procedures and guidelines to be used for direct sales, review sales planning, analysis and reporting techniques for direct sales and understand the principles underpinning direct sales activities in a contact centre

Learning outcome
The learner will: 1. be able to contribute to the development of organisational sales strategy in a contact centre
Assessment criteria
The learner can: 1.1 identify the features of organisational sales strategy that have an impact on direct sales operations 1.2 recommend developments to the sales strategy that are capable of enhancing sales performance.

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

Learning outcome
The learner will: 2. be able to develop procedures and guidelines to be used for direct sales through a contact centre
Assessment criteria
The learner can: 2.1 assess the importance of sales information that is needed to achieve the sales objectives 2.2 confirm that the required sales information can be collected with minimum disruption to sales activities 2.3 define the sales style and techniques to be used to achieve direct sales objectives 2.4 confirm the fitness for purpose of the draft procedures and guidelines through a test and trial.

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

Learning outcome
The learner will: 3. be able to review sales planning, analysis and reporting techniques for direct sales through a contact centre
Assessment criteria
The learner can: 3.1 review current sales plans and methods of devising them from an analysis of customer, market and sales information against agreed criteria 3.2 identify the actions needed to achieve sales objectives and plans 3.3 design sales analysis tools that are capable of monitoring sales and enhancing performance 3.4 implement the agreed actions to enhance performance in accordance with the sales plan 3.5 define sales reporting requirements that are capable of capturing the required monitoring and sales performance information.

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

Learning outcome
The learner will: 4. understand the principles underpinning direct sales activities in a contact centre
Assessment criteria
The learner can: 4.1 evaluate the strategic implications of the range of products and/or services covered by contact centre direct sales 4.2 evaluate current organisational approaches and systems for direct sales 4.3 evaluate the impact of regulation and legislation on direct sales operations 4.4 explain how to specify sales analysis requirements 4.5 evaluate the implications of the options for sales monitoring tools 4.6 evaluate how an organisational sales strategy drives direct sales operations.

Assessment Guidance
Evidence may be provided by: • report* • professional discussion • questioning Note: here the candidate may prefer to produce a report that outlines how they worked their way through the unit. This report will require to be backed by additional evidence that provides confirmation that they competently managed a direct sales operation in a contact centre. Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.