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| Unit Title: | Carry out direct sales activities in a contact centre |
| OCR unit number: | 37 |
| Level: | 2 |
| Credit value: | 5 |
| Guided learning hours: | 15 |
| Unit reference number: | L/503/0394 |

Unit aim and purpose

This unit concerns being able to gather information needed for direct sales activities in a contact centre, carry out direct sales to customers, keep direct sales records, comply with regulations and legislation during direct sales and understand how to conduct sales activities in a contact centre.

| Learning Outcomes | Assessment Criteria |
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| The Learner will: 1 Be able to gather information needed for direct sales activities in a contact centre | The Learner can: 1.1 Assemble information about products and/or services that support direct sales 1.2 Obtain from customers sufficient information to support direct sales activities 1.3 Create sales opportunities by making links between information provided by customers and products and/or services 1.4 Find potential new customers for products and/or services |
| 2 Be able to carry out direct sales to customers through a contact centre | 2.1 Establish customers' identity in accordance with organisational procedures 2.2 Check customers' wishes and needs 2.3 Identify possible matches with products and/or services from information provided by customers 2.4 Explain to customers the features and benefits of products and/or services for sale 2.5 Adapt their sales approach and style to meet customer preferences 2.6 Maximise opportunities for cross-selling and up-selling 2.7 Complete the authorisation or payment in accordance with organisational procedures |
| 3 Be able to keep direct sales records within a contact centre | 3.1 Identify the information about customers, products and/or services that should be recorded during the sales process 3.2 Record customer, product and/or service information in accordance with organisational procedures |
| 4 Be able to comply with regulations and legislation during direct sales in a contact centre | 4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre 4.2 Ensure compliance with regulations during direct selling through a contact centre |

| Learning Outcomes | Assessment Criteria |
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| 5 Understand how to conduct sales activities in a contact centre | 5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre 5.2 Describe the organisational policies and procedures for direct sales through a contact centre 5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities 5.4 Describe the common objections and questions raised by customers during direct selling 5.5 Explain how to identify cross-selling and up-selling opportunities 5.6 Describe different methods of researching potential new customers 5.7 Explain how to retrieve information from organisational sales records 5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling |

Assessment

This unit is internally assessed by centre staff and externally verified by OCR Assessors.

Guidance on assessment

Skills CFA Assessment Strategy Competence units (S/NVQ).

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website www.ocr.org.uk.