



## Lead direct sales activities in a contact centre team

VRQ

Learner name:

UBU74

Learner number:

D/503/0397





# VTCT

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VTCT is a registered charity investing in education and skills but also giving to good causes in the area of facial disfigurement.

By signing this statement of unit achievement you are confirming that all learning outcomes, assessment criteria and range statements have been achieved under specified conditions and that the evidence gathered is authentic.

Unit code	Date achieved	Learner signature	Assessor initials	IQA signature (if sampled)

All assessors using this Record of Assessment book must complete this table. This is required for verification purposes.

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# Lead direct sales activities in a contact centre team

**UBU74**

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The aim of this unit is to develop your knowledge, understanding and skills to lead direct sales activities within a team in a contact centre. You will learn how to collate data and analyse the sales performance of the team. You will also learn how to use techniques to overcome objections and explain the benefits to customers during a sale.

Level

3

Credit value

4

GLH

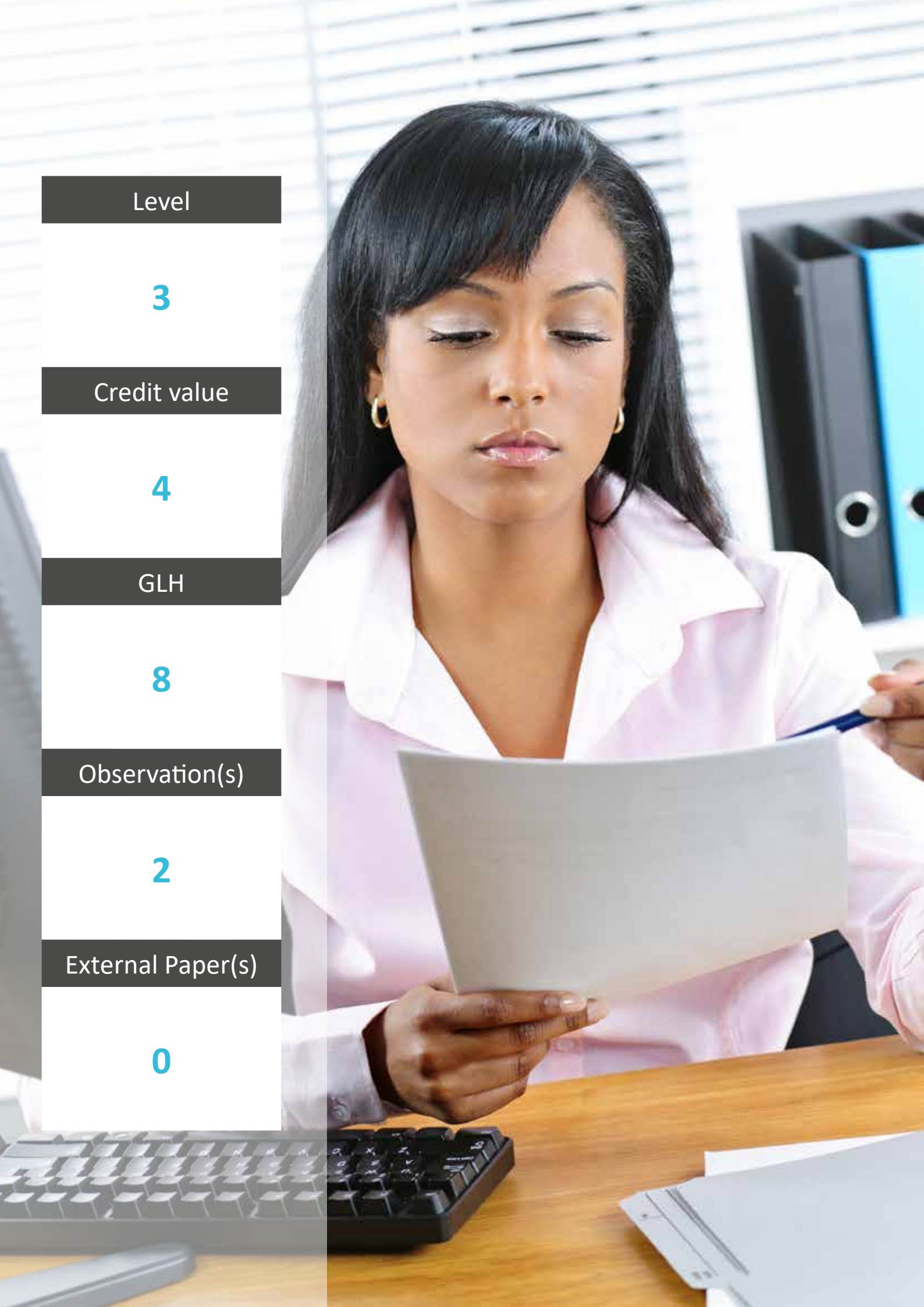
8

Observation(s)

2

External Paper(s)

0



### Learning outcomes

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#### On completion of this unit you will:

1. Be able to carry out sales activities in a contact centre
2. Be able to analyse contact centre sales data
3. Be able to lead a team involved in direct sales activities in a contact centre
4. Understand sales activities in a contact centre team

### Evidence requirements

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#### 1. Environment

Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).

#### 2. Simulation

Simulation is not allowed in this unit.

#### 3. Observation outcomes

Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence. Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

Assessed observations should not be carried out on the same day for the same learning outcome. There should be sufficient time between assessments for reflection and personal development.

You need to meet the same standard on a regular and consistent basis. Separating the assessments by a period of at least two weeks is recommended as competence must be demonstrated on a consistent and regular basis.

#### 4. Knowledge outcomes

There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.

#### 5. Tutor/Assessor guidance

Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on [www.vtct.org.uk](http://www.vtct.org.uk) under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on [www.vtct.org.uk](http://www.vtct.org.uk) under the relevant qualification page.

#### 6. External paper

There is no external paper requirement for this unit.

# Achieving observations

## Achieving observation outcomes

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Your assessor will observe your performance of practical tasks. The minimum number of competent observations required is indicated in the Evidence requirements section of this unit.

Criteria may not always naturally occur during a practical observation. In such instances you will be asked questions to demonstrate your competence in this area. Your assessor will document the criteria that have been achieved through professional discussion and/or oral questioning. This evidence will be recorded by your assessor in written form or by other appropriate means.

Your assessor will sign off a learning outcome when all criteria have been competently achieved.

## Relationship to National Occupational Standards

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Contact Centre National Occupational Standards:

- CFACC20 Lead direct sales activities in a contact centre team

## Learning outcome 1

### Be able to carry out sales activities in a contact centre

**You can:**

- a. Prepare for a direct sales activity in accordance with organisational procedures\*
- b. Establish customer wishes and needs
- c. Offer options to customers by linking their wishes and needs to products and/or services
- d. Adapt your sales style and techniques to mirror customer wishes and behaviour
- e. Close the sale by agreement with the customer during the customer contact
- f. Record the confirmed order in accordance with organisational procedures\*
- g. Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre
- h. Complete the authorisation or payment in accordance with organisational procedures

\*May be assessed by supplementary evidence.

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			



# Developing knowledge



## Achieving knowledge outcomes

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You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below\*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

\*This is not an exhaustive list.



## Learning outcome 2

Be able to analyse contact centre sales data

You can:	Portfolio reference
a. Collate sales data from direct sales activities in a format that enables data manipulation	
b. Analyse sales performance against market and customer trends	
c. Summarise the results of the sales analysis to enable the formulation of a sales plan	

## Learning outcome 3

Be able to lead a team involved in direct sales activities in a contact centre

You can:	Portfolio reference
a. Identify sales activities which are capable of fulfilling the sales plan	
b. Agree realistic and achievable team sales targets including cross-selling and up-selling	
c. Monitor the team's sales performance against agreed targets	
d. Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach	
e. Provide encouragement and guidance to team colleagues during sales activities	

## Learning outcome 4

### Understand sales activities in a contact centre team

You can:	Portfolio reference
a. Explain the features and benefits of the products and/or services offered or supported by the contact centre	
b. Explain the organisational and regulatory requirements of direct sales activities	
c. Explain the techniques for overcoming objections and questions from customers during sales activities	
d. Explain the importance of adapting your style and approach to mirror customers' style and perspective	
e. Explain the importance of setting a good example in a contact centre team	
f. Explain how to set sales targets including cross-selling and up-selling	

# Notes

Use this area for notes and diagrams



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# Notes

Use this area for notes and diagrams



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