



Contribute to sales activities in a contact centre

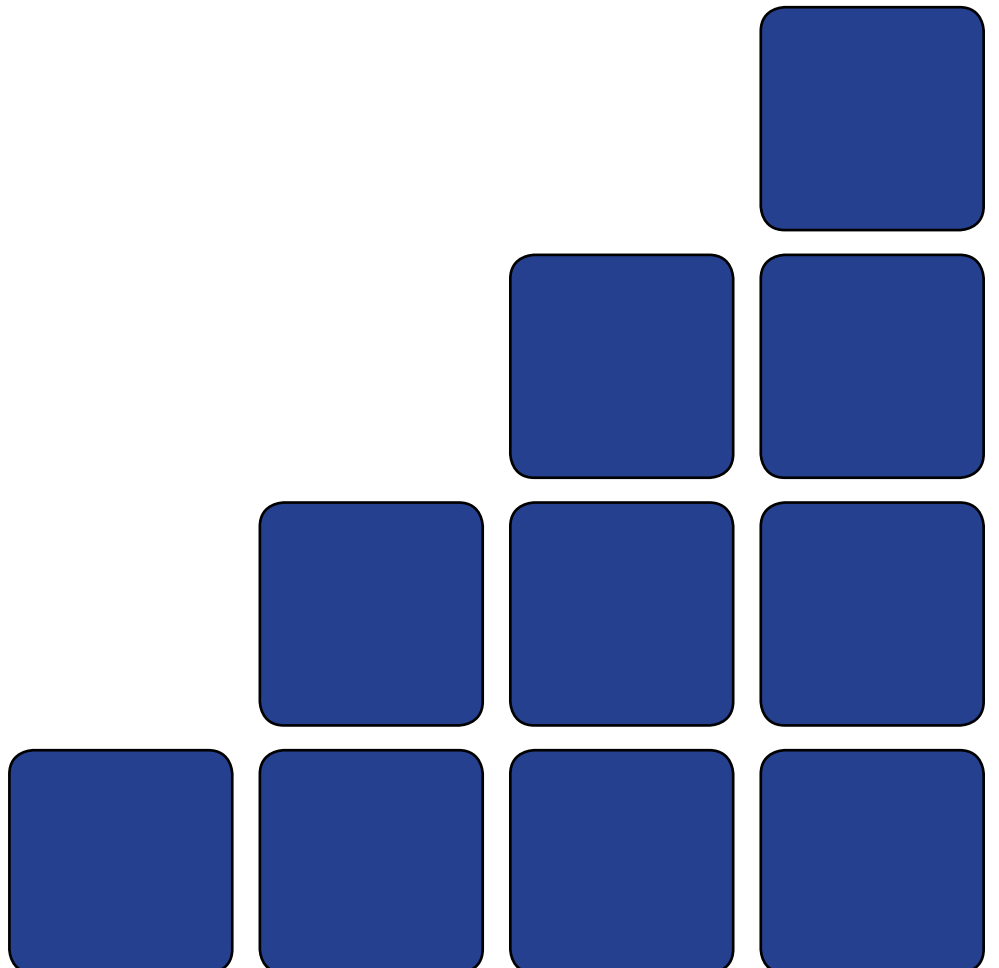
UBU14

F/503/0392

Learner name:

Learner number:

VRQ



UBU14

Contribute to sales activities in a contact centre

The aim of this unit is to develop the knowledge and understanding to contribute to sales activities. You will learn how to gather the relevant information and make a direct sale to customers within a contact centre.

Level

1

Credit value

3

GLH

6

Observation(s)

2

External paper(s)

0



Contribute to sales activities in a contact centre

Learning outcomes

On completion of this unit you will:

1. Be able to gather and use specified sales information in a contact centre
2. Be able to make direct sales to customers through a contact centre
3. Understand sales activities in a contact centre

Evidence requirements

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 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 under the relevant qualification page.

6. *External paper*

There is no external paper requirement for this unit.

Achieving observations

Achieving observation outcomes

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.



Observations

Learning outcome 1

Be able to gather and use specified sales information in a contact centre

You can:

- a. Gather the specified information about customers, products and/or services in accordance with organisational procedures
- b. Provide information to customers about products and/or services in accordance with organisational procedures
- c. Collect from customers information that supports potential sales in accordance with organisational procedures
- d. Check with customers the accuracy of the information provided
- e. Keep records of customers 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			



Learning outcome 2

Be able to make direct sales to customers through a contact centre

You can:

- a. Identify customers in accordance with organisational procedures
- b. Establish customers' needs for potential sales of products and/or services within your level of authority
- c. Check with customers the accuracy of the order
- d. Refer customers to an authorised colleague when sales requests are beyond your level of authority
- e. Complete the authorisation or payment in accordance with organisational procedures

**May be assessed by supplementary evidence.*

Observation	1	2	<i>Optional</i>
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			

Achieving knowledge outcomes

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.*

Knowledge



Learning outcome 3

Understand sales activities in a contact centre

You can:	Portfolio reference
a. List the products and/or services offered or supported by the contact centre	
b. List the regulations and/or legislation that has an impact on dealing with customers	
c. State the organisational procedures for processing sales and payments and/or establishing order authority with customers	