



Carry out direct sales activities in a contact centre

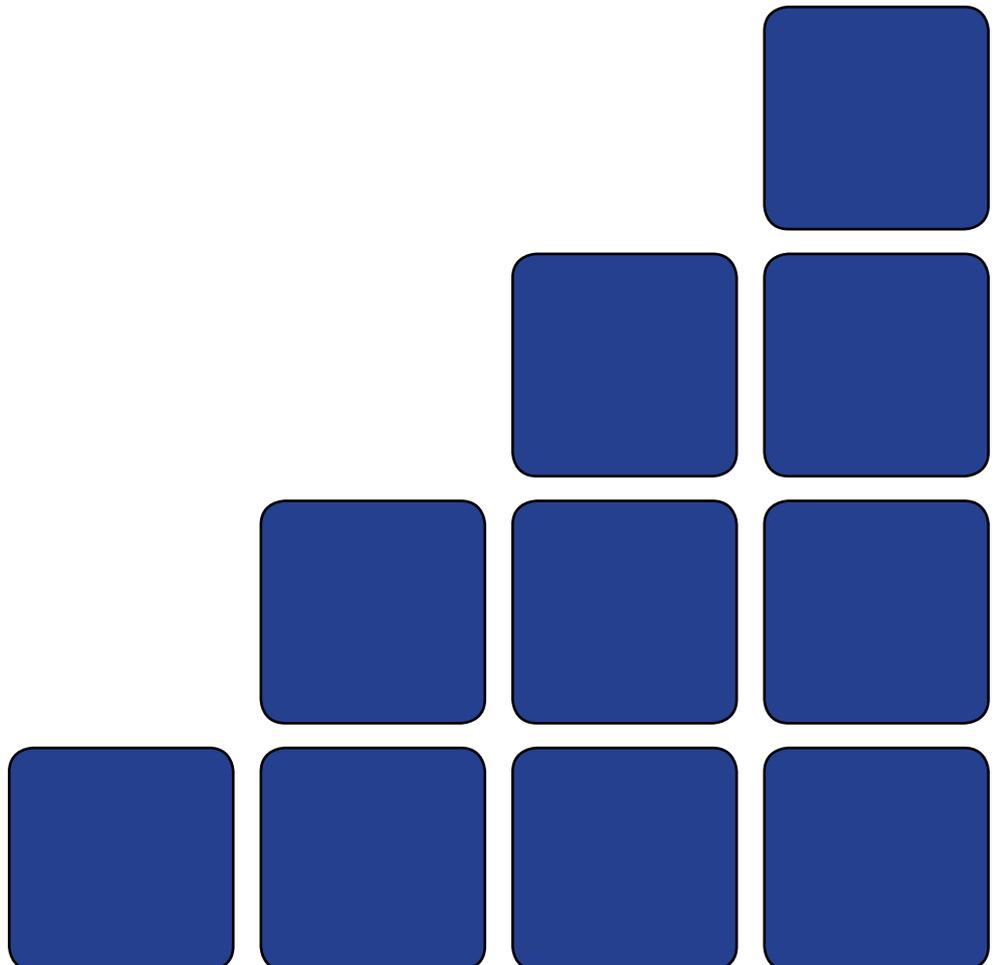
UBU49

L/503/0394

Learner name:

Learner number:

VRQ



UBU49

Carry out direct sales activities in a contact centre

The aim of this unit is to develop your knowledge, understanding and skills to carry out direct selling within a contact centre. You will learn how to create sales opportunities and maximise the sale by cross-selling and up-selling. You will also learn how to comply with legislation and organisation procedures when selling to your customers.

Level

2

Credit value

5

GLH

15

Observation(s)

2

External paper(s)

0



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Learning outcomes

On completion of this unit you will:

1. Be able to gather information needed for direct sales activities in a contact centre
2. Be able to carry out direct sales to customers through a contact centre
3. Be able to keep direct sales records within a contact centre
4. Be able to comply with regulations and legislation during direct sales in a contact centre
5. Understand how to conduct 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.

Relationship to National Occupational Standards

This unit is linked to Contact Centre National Occupational Standards:

- CFACC19 Carry out direct sales activities in a contact centre



Observations

Learning outcome 1

Be able to gather information needed for direct sales activities in a contact centre

You can:

- a. Assemble information about products and/or services that support direct sales*
- b. Obtain from customers sufficient information to support direct sales activities
- c. Create sales opportunities by making links between information provided by customers and products and/or services
- d. Find potential new customers for products and/or services*

* 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 carry out direct sales to customers through a contact centre

You can:

- a. Establish customers' identity in accordance with organisational procedures
- b. Check customers' wishes and needs
- c. Identify possible matches with products and/or services from information provided by customers
- d. Explain to customers the features and benefits of products and/or services for sale
- e. Adapt your sales approach and style to meet customer preferences*
- f. Maximise opportunities for cross-selling and up-selling*
- g. 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			



Learning outcome 3

Be able to keep direct sales records within a contact centre

You can:

- a. Identify the information about customers, products and/or services that should be recorded during the sales process*
- b. Record customer, product and/or service information 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 4

Be able to comply with regulations and legislation during direct sales in a contact centre

You can:

- a. Identify the regulatory requirements that have an impact on direct sales activities through a contact centre*
- b. Ensure compliance with regulations during direct selling through a contact centre*

*May be assessed by supplementary evidence.

Observation	1	2	Optional
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

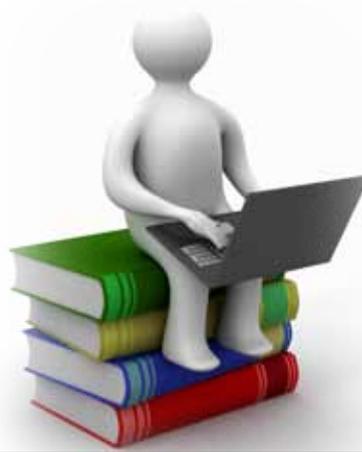
Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

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 5

Understand how to conduct sales activities in a contact centre

You can:	Portfolio reference
a. Describe the features and benefits of the products and/or services offered or supported by the contact centre	
b. Describe the organisational policies and procedures for direct sales through a contact centre	
c. Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities	
d. Describe the common objections and questions raised by customers during direct selling	
e. Explain how to identify cross-selling and up-selling opportunities	
f. Describe different methods of researching potential new customers	
g. Explain how to retrieve information from organisational sales records	
h. Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling	