

CFACC18

Contribute to basic sales activities in a contact centre



Overview

What this standard is about

Many contact centres carry out sales activities during their contact with customers. In some cases, this is the primary purpose of the contact centre activities and, in other cases, sales are a by-product of support and guidance being provided to customers. Whichever is the case, direct selling through a contact centre involves particular competences. At its simplest level, making a sale through a contact centre involves gathering information from a customer and taking an order for a defined range of services or products.

This standard is about this straightforward selling process and what you must do to carry out basic sales activities.

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Performance criteria

You must be able to:

Gather and use specified sales information

- P1 Gather information about customers
- P2 Gather information about the services and/or products available for sale
- P3 Provide information to customers about the services and/or products that are available
- P4 Collect information from customers that supports potential sales and helps to identify their needs
- P5 Check customer information with customers to ensure that all details are correct
- P6 Keep appropriate records of customers

Make direct sales to customers through a contact centre

- P7 Follow organisational procedures to identify your customer
- P8 Establish customer needs for potential sales of services and/or products within your own authority
- P9 Record your customer's needs using your organisation's systems and procedures
- P10 Check the order you have recorded with your customer
- P11 Complete authorisation or payment details to finalise the sale with your customer
- P12 Pass customer contact to a colleague with authority if a sales request is beyond your authority

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Knowledge and understanding

You need to know and understand:

- K1 The range of services and/or products you can deal with
- K2 Regulations or legislation that may impact on the way you deal with customers
- K3 Sources of information about the services or products that you are able to deal with
- K4 The limits of your authority to complete sales transactions
- K5 Organisational procedures for establishing customer identity in a contact centre transaction
- K6 What information is needed to complete a sale
- K7 Organisational procedures for recording sales details
- K8 Organisational procedures for taking payment or establishing order authority with your customer
- K9 Which colleagues can take over a customer transaction when it is beyond your authority

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