

## CFACC21

# Monitor and oversee direct sales activities in a contact centre



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### Overview

#### What this standard is about

Many contact centres undertake direct sales activities. These may be through inbound or outbound contacts and may or may not be the primary purpose of a particular contact. Sales activities can be undertaken by any agent at different levels and with different experience. Basic, routine and complex sales involve different team members but all require organisational support and guidance. Sales information and sales techniques must be kept under constant review when monitoring reveals the need for change. Analysis and planning are part of the management process as well as the development of team skills and support for team members.

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### Performance criteria

*You must be able to:*

#### **Monitor and review sales information use and sales techniques in a contact centre**

- P1 Organise spot checks and routine monitoring of sales information gathering
- P2 Organise spot checks and routine monitoring of sales techniques being used
- P3 Collect and collate results of sales monitoring processes
- P4 Review procedures for sales information collection in the light of monitoring data
- P5 Review sales techniques in use in the light of monitoring data
- P6 Identify possible improvements in customer information collection or sales techniques in use in the contact centre
- P7 Implement actions to make improvements in customer information collection or sales techniques

#### **Analyse sales and devise sales plans for direct sales in a contact centre**

- P8 Use sales information to analyse sales patterns and trends
- P9 Review sales analysis to identify areas for improvement
- P10 Report on sales analysis and review to inform and consult on opportunities for improvements
- P11 Implement actions to improve sales performance based on sales analysis and review
- P12 Identify the key elements and components of a sales plan for direct sales through a contact centre
- P13 Create a sales plan for contact centre teams

#### **Develop individual and team sales performance in a contact centre**

- P14 Review sales analysis and sales plans to identify skills needs for direct sales in a contact centre
- P15 Review individual and team sales skills and performance against skills needs for teams and individuals
- P16 Devise personal development plans to develop individual sales skills in contact centre staff
- P17 Devise a team development plan to develop team sales skills in a contact centre

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- P18 Implement personal development plans to develop individual sales skills in a contact centre
- P19 Implement a team development plan to develop team sales skills in a contact centre

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### Knowledge and understanding

*You need to know and understand:*

- K1 Features and benefits of available services and/or products that impact on the sales process
- K2 Organisational policy and procedures on direct sales
- K3 Regulations and legislation relevant to direct sales in a contact centre
- K4 How to organise and carry out spot checks on sales processes
- K5 How to organise and carry out routine checks on sales activities
- K6 Techniques for collecting and collating results of sales monitoring processes
- K7 Techniques for reviewing sales monitoring results and identifying options for action
- K8 Sales analysis and reporting techniques to improve sales performance in a contact centre
- K9 The key components of a sales plan
- K10 How to create and implement a personal development plan for sales skills in a contact centre
- K11 How to create and implement a team development plan for sales skills in a contact centre

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| <b>Originating organisation</b> | CfA Business Skills @ Work                                                                                                 |
| <b>Original URN</b>             | N/A                                                                                                                        |
| <b>Relevant occupations</b>     | Operator, centre, contact, Adviser, Agent                                                                                  |
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