

Overview

This standard is about managing direct sales activities in a contact centre. You will gather sales information and use relevant techniques and styles to meet sales objectives. It also involves sales planning, analysing sales and reporting on results.

You will also contribute to sales planning and development of organisational sales strategies. It is for contact centre professionals on supervisory or managerial levels who have responsibility for managing direct sales operations.

Performance criteria

You must be able to:

Define information and techniques to be used for direct sales through a contact centre

1. identify the sales strategy for a contact centre direct sales operation
2. define sales information that is needed to achieve sales objectives
3. check that the sales information required can be collected without hampering sales activities
4. define the sales style and techniques to be used to achieve direct sales objectives
5. organise the development of procedures and guidelines for team members making direct sales through a contact centre
6. test procedures and guidelines involving colleagues who carry out sales activities to ensure they are practical in a contact centre
7. monitor supervision and management of direct sales activities during and after implementation of new procedures

Review sales planning, analysis and reporting techniques for direct sales through a contact centre

8. collate customer, market and sales information required for sales planning
9. review current sales plans and methods for devising them
10. implement ways of improving sales planning relevant to direct sales through a contact centre
11. identify sales analysis needed to achieve sales objectives and plans
12. contribute to the design of sales analysis tools to monitor sales and improve sales performance in direct selling through a contact centre

13. define sales reporting requirements to monitor and improve direct sales performance in a contact centre

Contribute to the development of organisational sales strategy

14. interpret sales information and analysis related to direct sales in a contact centre and relevant to organisational sales strategy

15. identify key features of organisational sales strategy that impact on direct sales operations through a contact centre

16. recommend developments in sales strategy that would improve overall sales performance

17. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and sales activities

Knowledge and understanding

You need to know and understand:

1. the strategic aspects of the range of services and products covered by contact centre direct sales
2. the current organisational approaches and systems for direct sales
3. the regulation and legislation that impacts on direct sales operations through a contact centre
4. the options for sales strategies for direct sales operations in a contact centre
5. the sales information required and techniques for collecting it, through direct sales activities
6. how to define sales styles and techniques for achieving sales objectives
7. how to devise and present effective guidelines for staff making direct sales through contact centres
8. the methods for testing guidelines and procedures
9. the monitoring techniques for the supervision and management of direct sales activities when implementing new procedures
10. the sales planning techniques and how to make improvements, making use of customer, market and sales information
11. the sales analysis techniques and how to specify sales analysis requirements
12. the options for sales monitoring and analysis tools
13. the sales reporting techniques and options
14. how to interpret sales information and analysis to ensure it aligns to organisational sales strategy
15. how to make clear links between organisational sales strategy and direct sales operations
16. the options for recommending improvements in organisational sales strategy
17. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and sales activities

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Manage direct sales operations in a contact centre

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