

CFAM5.3.1 Develop and maintain a marketing database



Overview

This is about contributing to the development and maintenance of a marketing database for customers/prospects. It includes defining the applications for the database, eg for direct marketing, and the information required within it regarding individual customers/prospects (such as demographic, geographic, psychographic and transactional data covering recency, frequency and monetary value). The effectiveness of the database is maintained continually.

This unit is recommended for marketers whose responsibilities include developing and maintaining a marketing database.

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Performance criteria

- You must be able to:*
- P1 identify the uses for, and associated requirements of, the database in line with the marketing strategy and plan
 - P2 identify the data requirements necessary to achieve the actions within the marketing plan
 - P3 determine relevant sources of the required data that can be accessed cost effectively
 - P4 identify any gaps in the information required, reporting and addressing these promptly and correctly
 - P5 review user requirements from the database, identifying correctly any shortfalls in the information provision and database functionality
 - P6 liaise with systems specialists to address shortfalls in the information provision, where solutions can be developed cost effectively
 - P7 maintain the information stored in the database, ensuring that it is accurate and up to date
 - P8 identify and delete redundant records
 - P9 liaise with users to assess their satisfaction with the database
 - P10 evaluate the effectiveness of the database, and report and address the outcomes promptly and correctly

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of maintaining an effective database, its potential applications, and how
- K2 database differs from a mailing list
- K3 the data components that might be included within a customer/prospect database, including geographic, demographic, psychographic and buying pattern data
- K4 the importance of ensuring that a database is up to date, and the implications of keeping data that is out of date
- K5 legal and ethical requirements regarding the collection, storage and use of information

You need to know and understand:

Industry/sector specific knowledge and understanding

- K6 marketing developments in the organisation's sector, relevant to the uses of a marketing database

You need to know and understand:

Context specific knowledge and understanding

- K7 the organisation's user requirements from the marketing database
- K8 the principal limitations upon the marketing database due to its operating systems
- K9 you own levels of competence and authority in developing and maintaining the database, and to whom to refer if these are exceeded

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Additional Information

Behaviours

1. You identify people's information needs
2. You identify sources of information to meet current and foreseeable requirements
3. You check the validity and reliability of information
4. You use language and communication styles appropriate to your audience, avoiding the use of jargon
5. You present information clearly, concisely and accurately
6. You listen actively, asking and encouraging questions, clarifying points to check mutual

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