

CFAM5.3.3

Use IT in managing marketing data



Overview

This is about using IT effectively in managing marketing data, which can include screening records, removing the duplication of records, and the removal of suppression groups from files of data.

This unit is suitable for marketers involved in managing data using IT applications.

CFAM5.3.3

Use IT in managing marketing data

Performance criteria

You must be able to:

- P1 use appropriate techniques to remove duplicate records
- P2 use reference files to ensure that, where possible, records contain the correct name and address information, and that every attempt has been made to address incomplete name and address details
- P3 enhance existing data by appending new information on listed individuals for targeting and segmentation purposes
- P4 identify which suppression groups must be applied to a file of records to comply with legislation and industry best practice
- P5 reformat fields of data according to specific requirements
- P6 assign campaign codes to records, according to the offer/product/service being promoted
- P7 check data files to ensure that all of the above has been completed successfully before outputting to the relevant third party

CFAM5.3.3

Use IT in managing marketing data

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the impact upon an organisation of not managing data appropriately, including the potential for breaches of legislation and best practice guidelines
- K2 the importance of record matching in managing data effectively in an IT environment
- K3 the importance of updating information held on individuals to ensure that personal information is correct and fit for purpose
- K4 the importance of removing duplicate records from customer/prospect files
- K5 the role of suppression groups in marketing communications
- K6 how to enhance the data held, by appending additional data to existing records for targeting and segmentation purposes, and the importance of this towards achieving greater understanding of customer/prospect intelligence
- K7 how to format the fields of a file to ensure easy transfer of relevant data to marketing communications
- K8 the importance of assigning unique identifier codes and campaign codes to identify responders

You need to know and understand:

Context specific knowledge and understanding

- K9 the purpose for the information being produced
- K10 the importance of demonstrating the return upon investment achieved by the organisation in managing its marketing data, and how to do this

CFAM5.3.3

Use IT in managing marketing data

Additional Information

Behaviours

1. You identify the purpose for which the data is required
2. You present findings clearly and accurately
3. You suggest ways in which data quality can be improved
4. You ensure that confidentiality is maintained

CFAM5.3.3

Use IT in managing marketing data

Developed by CFA Business Skills @ Work

Version number 1

Date approved April 2010

Indicative review date April 2012

Validity Current

Status Original

Originating organisation Chartered Institute of Marketing

Original URN NM5.3.3

Relevant occupations 1132 Marketing & Sales Managers
3543 Marketing Associates

Suite Marketing

Key words Marketing, sales, marketing management, market research, advertising, public relations