
Overview

This unit is about developing and keeping up-to-date marketing and sales information and an associated database. It includes establishing what information is required regarding individual existing and potential customers, and how it is to be managed. It also includes evaluating the effectiveness of the database and taking relevant steps to enhance its usefulness.

Who this unit is for

This unit is recommended for those with responsibility for managing customer information and for organising it in a way that promotes the effective promotion and selling of an organisation's products/services, but who may not necessarily be marketing or sales specialists. For example, such individuals might be 'general' managers within larger organisations, or managers and/or proprietors within small to medium sized organisations.

Related specialist units

Those seeking specialist standards offering greater depth regarding this area are referred to the following related MSSSB units:

Marketing units

1. Develop a customer information strategy
2. Implement a customer information strategy
3. Develop and maintain a marketing database

Sales units

4. Use databases to support sales activities
5. Input and access data in your organisation's information systems

Details of these units can be accessed via <www.msssb.org>

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Performance criteria

You must be able to:

- P1 determine and prioritise your organisation's information and database requirements regarding its existing and potential customers
- P2 identify the information held already, and also potential sources for accessing any further information required
- P3 review user requirements from the database, identifying correctly any shortfalls in the existing information provision and database functionality
- P4 liaise with systems specialists to address shortfalls in the information provision, where solutions can be developed cost effectively
- P5 assess the options for collecting the information required, determining their relative costs and benefits
- P6 analyse and structure information to develop knowledge that can be shared with relevant people, and in a format that is fit for purpose and is understood by those using it
- 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
- P11 monitor implementation to check that all legal, industry, organisational and ethical guidelines are met, addressing any variances promptly and correctly

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of information in understanding the buying patterns of customers, including how this can inform the marketing of products/services, including their development and how products/services are made available to target customers
- K2 the importance of databases to the sales function, especially in relation to identifying customers to target for specific sales campaigns
- K3 the factors to assess when determining customer information requirements, and the importance of differentiating between those requirements that are 'must haves' versus those that are 'nice to know'
- K4 the importance of maintaining an effective database, its potential applications, and how
- K5 database differs from a mailing list
- K6 the data components that might be included within a customer/prospect database, including geographic, demographic, psychographic and buying pattern data
- K7 the importance of ensuring that a database is up to date, and the implications of keeping data that is out of date
- K8 legal and ethical requirements regarding the collection, storage and use of information

You need to know and understand:

Industry/sector specific knowledge and understanding

- K9 industry/sector codes of practice and ethical guidelines relating to the use of databases and associated information
- K10 marketing/selling developments in your organisation's sector, relevant to the uses of a database

You need to know and understand:

Context specific knowledge and understanding

- K11 your organisation's user requirements from the database
- K12 the financial implications of database design and maintenance and the organisational resources available to support the work
- K13 your 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 check the quality, validity and reliability of information
2. You present information clearly, concisely and accurately
3. You comply with legal and ethical requirements regarding the collection, storage and use of information

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Relevant occupations Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Database Administration; Software Development; Systems Support; Local Area Archives; Microfilm and Microfiche Technician; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Microsoft Certified Professional; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Engineering and manufacturing technologies; Engineering; Manufacturing technologies; Transportation operations and maintenance; Construction, planning and the built environment; Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Crafts, creative arts and design; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies;

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Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forest; Managers and Proprietors In Other Service; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Skilled Agricultural Trades; Metal Forming, Welding and Related Trade; Metal Machining, Fitting and Instrument ; Vehicle Trades; Electrical Trades; Construction Trades; Building Trades; Textile and Garment Trades; Printing Trades; Food Preparation Trades; Skilled Trades NEC; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales Related Occupations; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

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Suite

Marketing and Sales Standards for non-specialists

Key words

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