

CFAS1.3

Use databases to support sales activities



Overview

This unit is all about how you use databases to store, analyse and provide information that is useful to the sales process.

The unit covers the full process of designing, setting up, populating, modifying and using databases.

However, this work cannot be done in isolation and you need to consult others about their information needs and sources, and how the information will be used by the sales function.

This unit applies to Sales Managers.

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Performance criteria

You must be able to:

- P1 review the business purpose of the sales database especially as it relates to the sales objectives
- P2 carry out a data audit to identify the information needed for effective sales activities and compare them with existing processes and databases in use
- P3 evaluate different types of database that could be used to provide effective and accurate sales information
- P4 evaluate the option of outsourcing specialist assistance and the project implications of doing so
- P5 identify the most suitable databases to use taking into account the information needs that have been defined
- P6 assess software and hardware requirements for the development and implementation of the database
- P7 define the data fields to be included in the database
- P8 provide guidance and skills development activities for those using the sales database
- P9 modify existing databases to meet changing information needs of the sales function

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Knowledge and understanding

You need to know and understand:

- K1 the importance of databases to the sales function especially in relation to identifying customers to target for specific sales campaigns
- K2 the main factors to consider when assessing the needs for a new database or modifications to existing databases
- K3 how data helps organisations to achieve business objectives
- K4 how to carry out a data audit
- K5 how 'de-duplication' can be used to avoid multiple entries within a database
- K6 hardware and software requirements for managing databases
- K7 how to evaluate a business case for outsourcing specialist database skills
- K8 technical features of databases including information, transactions, codes, response mechanisms, and data collection requirements
- K9 relevant legislation and regulation that restrict the design and use of databases

Industry/Sector specific knowledge and understanding

- K10 industry/sector codes of practice and guidelines relating to the use of databases and associated information
- K11 trends and developments in databases

Context specific knowledge and understanding

- K12 sales objectives for the organisation
- K13 how databases are designed and used in your organisation including protocols and standards for database development and management
- K14 the financial implications of database design and maintenance and the organisational resources available to support the work
- K15 the marketing database, the usefulness of information stored within it and its compatibility with sales information needs
- K16 information requirements of sales teams
- K17 what systems are in place to monitor and review the use of databases
- K18 what database systems are used by your organisation and how effective they are in providing necessary information
- K19 where to obtain advice about database development and use within your organisation

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Additional Information

Behaviours

1. you anticipate the information needs of the sales function and consult others to confirm these needs
2. you describe the information needs and database requirements of the sales function to other departments in the organisation or to external database specialists
3. you take personal responsibility for making things happen in relation to database development
4. you determine appropriate criteria for the development and modification of sales databases
5. you constantly seek to ensure that database information and functions enhance sales performance
6. you assess the type of assistance required for database users
7. you review the changing information needs of the sales function and consider potential modifications to the database where required
8. you maintain confidentiality at all times
9. you comply with relevant data protection, e-communication and consumer protection legislation
10. you communicate information from the database to those who need and are entitled to it

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7129 Sales related occupations nec

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