
Overview

This standard is about using sales technology systems to plan and implement sales activities. It includes the use, storage and maintenance of information within a sales technology system. It also includes monitoring your own use of the systems and providing feedback to improve the system. It is not aimed at those who manage sales technology systems, but at sales professionals who use sales technology systems for sales activities.

Performance

criteria

- You must be able to:
- P1 use information appropriately in planning and implementing sales activities
 - P2 store information on the sales technology system, checking its quality, validity and reliability
 - P3 maintain the information stored in the sales technology system, ensuring it is accurate and up to date
 - P4 make appropriate links between the sales technology systems and other technologies in line with organisational procedures
 - P5 monitor own use of the sales technology system, seeking guidance, support and skills development where appropriate
 - P6 provide feedback on the fitness for purpose of the sales technology system, making evidence-based recommendations for improvement

Knowledge and understanding

You need to know and understand:

- K1 legal and ethical issues relating to the use of sales technology systems
- K2 the information needs of the sales function
- K3 how to use the sales technology system as part of planning sales activities
- K4 organisational processes and procedures for using, storing and maintaining information
- K5 how to link other technologies with the sales technology system and the organisational procedures for doing so
- K6 the support, guidance and skills development that is available to sales technology system users
- K7 how to make recommendations for improvements to the sales technology system, based on evidence

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