
Overview

This unit is about managing sales technology systems to store, analyse and provide information that is useful to the sales process. It includes analysing current and future sales information needs, evaluating the functionality of existing systems and developing plans to make appropriate changes. It also includes supporting users of sales technology systems and monitoring the use and effectiveness of the system. This standard is aimed at senior sales professionals and sales managers.

Performance

criteria

- You must be able to:
- P1 analyse the current and future sales information needed for sales activities within the organisation
 - P2 evaluate the functionality of existing sales technology systems to meet current and potential future needs and identify any changes or enhancements required
 - P3 develop and implement plans to introduce appropriate changes and enhancements to sales technology systems, engaging colleagues and stakeholders in the development process
 - P4 ensure the use, maintenance and updating of information within the sales technology system is carried out in line with relevant procedures
 - P5 provide up-to-date guidance, support and skills development activities for those using the sales technology system
 - P6 monitor the effectiveness of the sales technology system in meeting the sales information needs of the organisation and take action to address problems

Knowledge and understanding**You need to know and understand:**

- K1 current legislation, regulation, codes of practice and guidelines relating to the use of sales technology systems and associated information
- K2 the main factors to consider when assessing current and future sales information needs and how sales technology information helps organisations to achieve business objectives
- K3 how sales technology systems are used in the organisation including protocols and standards for information management
- K4 the sales technology system, the usefulness of information stored within it and its compatibility with sales information needs
- K5 types of guidance and support that can be provided for those using the sales technology system
- K6 how to provide appropriate skills development activities for sales professionals, and recognise individual attitudes towards, and use of, sales technology systems
- K7 the systems that are in place to monitor and review the use of sales technology systems

CFASAL003
Manage sales technology systems



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