

Overview

This standard is about managing sales tools and technology systems. It covers the use of systems to store, analyse and provide information to support the sales processes and activities. The standard includes aligning the tools and technology systems with sales strategy, analysing current and future sales information requirements, collating data and insights to analyse the performance of sales activities, evaluating the functionality of existing systems and developing plans to make appropriate changes. It also includes training and supporting users of sales technology systems, keeping the tools and systems updated and monitoring the effectiveness of the systems. This standard is aimed at senior sales professionals and sales managers who manage sales tools and technology systems.

Performance criteria

You must be able to:

1. identify the tools and technology systems for sales processes and activities
2. analyse how the tools and technology systems align with your organisation's sales strategy
3. ensure the tools and technology systems are configured in accordance with identified sales processes and activities
4. ensure data collected and used is compliant with privacy and other relevant regulations
5. analyse the current and future sales information requirements for sales processes and activities
6. engage users in pilot testing and development of tools and technology systems
7. identify relevant amendments to configuration of sales tools and technology systems
8. develop and implement plans to introduce amendments to sales tools and technology systems
9. use tools and technology systems for collecting data and insights for analysis of sales activities
10. evaluate the functionality of existing tools and technology systems in relation to sales processes and activities
11. engage colleagues and other stakeholders in the development process
12. ensure the use, maintenance and updating of information within the sales technology systems are carried out in accordance with relevant procedures and legislation
13. provide up-to-date guidance, support and skills development activities for the users of sales tools and technology systems
14. monitor the effectiveness of the tools and sales technology systems in meeting the required performance levels of sales activities
15. ensure the contracts for use of sales tools and technology systems are current and valid
16. renew the contracts or seek alternative sales tools and technology systems

Knowledge and understanding

You need to know and understand:

1. the current legislation, regulation, codes of practice and guidelines relating to the use of sales-related information, sales tools and technology systems
2. the current and future sales information requirements
3. the tools and technology systems available for sales processes and activities
4. the types of information stored within sales technology systems
5. your organisation's sales strategy and how the sales tools and technology systems align with it
6. how sales tools and technology systems should be configured in accordance with sales processes and activities
7. the importance of engagement with colleagues and other stakeholders in testing and development of technology systems and tools
8. the types of metrics for analysis of sales activities' performance
9. the types of reports to use for analysis and evaluation of sales activities
10. the processes involved in security of sales tools and technology systems
11. the evaluation criteria in relation to, functionality of sales tools and technology systems
12. the types of guidance and support for the users of sales tools and technology systems
13. the types of technical contracts for sales tools and technology systems and their renewal cycles
14. how to provide training and skills development activities for users of sales tools and technology systems
15. the processes for monitoring and review of sales tools and technology systems

Manage sales tools and technology systems

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Relevant Occupations Business Sales Executives, Marketing and Sales Managers, Sales Accounts and Business Development Managers, Sales Related Occupations, Telephone Salespersons

Suite Sales

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