

<b>JOB TITLE:</b>	CRM MANAGER
<b>JOB HOLDER:</b>	
<b>DATE UPDATED:</b>	APRIL 2021
<b>REVISION (Office)</b>	1

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## 1 MAIN PURPOSE OF THE JOB

The role exists:

- To manage BIU team operations, including BAU, backlog, task and change management (Service Management model)
- To ensure the CRM system is used effectively to support the on-going needs of the organisation and stakeholders
- With the Head of CRM, work collaboratively with internal stakeholders and external technical partners to provide business application support, CRM System (MS Dynamics) subject matter expertise.

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## 2 POSITION IN ORGANISATION

- This role reports directly to the Head of CRM Services
- Line Management of Database Controller

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## 3 DIMENSION & LIMITS OF AUTHORITY

- N/A

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## 4 SKILLS & EXPERIENCE

- Demonstrable Team/Stakeholder/Partner Management in a CRM environment
- Knowledge of MS Dynamics CRM 2016 or later: incl. forms, system views, dashboards, business workflows, surveys, marketing lists and the ability to translate this knowledge into appropriate business outcomes
- Experience of running structured Development, Change Management projects and Operational/BAU processes in a complex environment
- Good interpersonal, verbal and written communication skills and the ability to interact in a professional manner with a diverse group, non-managers, managers, directors, super users and third-party software providers, translating complex technical requirements into business needs where appropriate
- Experience of development life cycle projects (Dev, UAT and Live)
- Experience using Microsoft Visio, MS Project, Excel, Dot Digital
- Strong people management skills, with the ability to lead, motivate and develop a team of technical experts.

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## 5 DUTIES & KEY RESPONSIBILITIES

### Platform Management & Strategy

**40%**

- Responsible for on-going database maintenance to ensure the platform continues to provide robust, stable and reliable support for the business including the set-up/removal of CRM user accounts/related permissions & security roles, 'Sprint' system updates and system maintenance.
- Initiate and manage development work to ensure the CRM and Data platforms continue to meet the organisation's business process needs. This will include customisation of Dynamics CRM entities, forms and workflows, integration with third party systems.

- Maintain CIOB custom territory hub/region mappings, membership products, financial GL coding/mapping, customer service case categories, departmental case queues, auto-routing rules for customer service queries, product/organisation service SLA's and knowledge base on CRM
- Operational responsibility for the relationship with CIOB's technical partners (incl. CRM system and Data warehouse)
- Work with the Head of CRM Services to develop longer term platform strategies to ensure the environment is right-sized and appropriate for CIOB's future business objectives

**Operational Management**

**30%**

- Operational management of the BIU team, with responsibility for ensuring development projects, change management and BAU are delivered on-time and to specification.
- Running planning and production meetings, managing priorities, longer term roadmap tasks to resources
- Running task, backlog & service desk management processes; provide accurate, relevant and timely reporting on BIU activity.
- Internal stakeholder management
- Manage BIU purchasing, invoicing and budget control (with Head of BIU)

**Development, Testing and Integration**

**10%**

- Design and build CRM custom forms, system views, personal views, business workflows and email/letter templates as required by the organisation's strategic project roadmap and in accordance to agreed requirements.
- Work with BIU team colleagues and third-party CRM solutions provider and IT team to manage periodic Silver bear sprint deployments and releases.
- Co-ordinate with departments and stakeholders on UAT testing and sign off.

**Data Management**

**10%**

- Support the data consolidation roadmap with a view to incorporating CIOB customer data and customer journey processes into the CRM system where appropriate
- Data quality; ensure processes and procedures are in place to measure, maintain and improve customer data quality.

**Staff Management**

**10%**

- Line management of two staff, task/matrix management of two staff
- Manage the performance and development of a high performing BIU team in line with the CIOB Vision and Values Framework; motivating and coaching them to deliver excellent performance.
- Cascade organisational objectives from the Corporate Plan into departmental and individual targets and KPIs as appropriate.
- Coach and develop the team, ensuring that each team member has the required levels of skill, behaviour and knowledge. Work with team members to ensure they have a personal development plan in place which they can take personal accountability for.
- Ensure effective team communication is maintained through regular one to one's, appraisals, mid-year reviews and team meetings.

**PLEASE SIGN BELOW**

<b>JOB HOLDER:</b> .....	<b>MANAGER:</b> .....
<b>DATE</b> .....	<b>DATE:</b> .....

Please forward a signed copy + an electronic copy to the HR department.