

# Role Profile

**Role title:** CRM Officer

**Reports to:** CRM Business Analyst (Product Owner)

**Job purpose:** To work with all departments acting as a trusted advisor and champion of the CRM system and integrated tools. Carrying out regular system usage reviews to ensure a consistent and high-quality product that delivers optimum efficiency and service.

Financial: None

Staff: No reports

Other: Contact point for external developers

## **Principal accountabilities:**

1. Work closely with all departments and act as a trusted advisor for the CRM system providing functional and data expertise advice including general business expertise in CRM business processes.
2. Lead regular system usage reviews to improve and optimise system use and support the creation of dashboards and data analysis to drive operational insights to ultimately reduce costs and optimise internal processes
3. Provide troubleshooting expertise and respond to user enquiries on CRM related issues. Resolve issues where possible or escalate appropriately as required.
4. Support the release coordinator with user acceptance testing as required. Working with teams to develop training, materials and FAQs to support releases and change where necessary
5. Deliver basic CRM training to new users or new starters as a champion for best practice of BACP processes and CRM.
6. Oversee user and data access within CRM including licence allocation, access, roles and permissions.
7. Coordinate regular de-duplication, data-cleansing, database housekeeping and disposal policy with department Data leads to maintain compliance with external legislation and ensure accurate data is held.
8. Work with teams to provide automated housekeeping and reports where possible.

## **BACP Principal accountability**

- To be a BACP ambassador by upholding and demonstrating our values at every opportunity, through verbal, written and face to face communication.

# Role Profile

## Context:

Operating environment: To work in a matrix structure across the organisation and at all levels of the business. Also liaise with external providers when required.

Framework & boundaries: GDPR, Charity Commission, Equality Act, BACP Terms and Conditions, Standing Orders and Articles of Association

Organisation: Within the Membership and Operations function

## Relationships:

Direct reports: No direct reports.

Manager: CRM Product owner to provide managerial support and guidance on a weekly basis. Monthly 121s and regular team meetings.

Other contacts: External developers, engagement of BACP teams at all levels across the organisation.

## Knowledge & experience:

- Educated to A level/ degree standard or have an equivalent professional qualification or can demonstrate relevant work experience.
- Experience in system administration and CRM techniques - Proficiency with MS Dynamics CRM is preferred.
- Experience of system user acceptance testing and sign off would be advantageous
- Knowledge of GDPR and other privacy and e-communications legislation and other recognised good practice for managing and using data.
- Experience in training users in a system context and experience with a Membership organisation would be advantageous

## Competencies

- Must be self-motivated, excellent communicator (oral and written), able to explain complex technical concepts in a user-friendly manner,
- Ability to interrogate complex information and evaluate data to make firm recommendations
- Excellent inter-personal skills and the ability to communicate and build effective working relationships at all levels
- Ability to work autonomously and juggle work priorities with diverse demands and meet objectives, targets and deadlines with excellent attention to detail.
- Analyse trends and effectively problem solve with solution-based approach using technical and professional knowledge whilst applying best practice.
- Understanding of data collation, handling and analysing
- High level of computer literacy skills across different systems, MS Office and ability to learn and adapt to IT systems

# Role Profile

**Job challenge:**

A major challenge for the role holder will be to manage diverse priorities from different teams across the organisation.