

Role Profile

Role title: CRM Business Analyst (Product owner)

Reports to: Business Insight Manager

Job purpose: To facilitate the business in defining and delivering the CRM changes necessary to support the company strategy. Working with the business to prioritise change holistically across the organisation so that maximum value is achieved and changes to the CRM / CMS are delivered consistently for optimum efficiency and service.

Financial: None

Staff: 2

Other: Third parties, Central contact point for external developers, BACP departments

Principal accountabilities:

1. Act as the main point of contact between BACP and third party solution provider of the CRM / CMS and oversee payment of the contract.
2. Ensure the long-term development roadmap prioritises changes with a maximum value and are aligned with business and CRM / CMS strategy.
3. Work with the business to define requirements by creating high-level business specifications, ensuring feasibility, functionality, and integration with existing systems and platforms
4. Maintain and assess the development backlog for value and effort to ensure user stories are prioritised for sprint planning
5. Work with teams to map both complex and continuous improvement business processes, identifying opportunities and areas for improvement.
6. Develop appropriately detailed specifications that are clearly understood by the 3rd party solution provider whilst supporting the business to define the acceptance criteria for QA and UAT.
7. Oversee the data held and managed in the CRM to ensure it is accurate, reliable and retained appropriately as determined by the business.
8. Propose new tools and integrations to the CRM / CMS roadmap which will enable further efficiency for the business.
9. Communicate regular updates or provide visibility to senior stakeholders and wider business of the CRM / CMS roadmap, sprint planning and progress.
10. Work with ICT to ensure licences are available and appropriate for new users and new functionality in the most cost effective manner. BACP
Principal accountabilities

Role Profile

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

Manage and lead employees using a performance management and development process that encourages employee contribution, and includes goal setting together with constructive feedback, such that employees feel valued.

Context: Operating environment: To coordinate and manage a matrix structure across the organisation and at all levels of the business. Main contact for the 3rd party supplier delivering BACP CRM / CMS releases and other 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: Support and guidance on a regular basis. Monthly 121s and team meetings

Manager: Managerial support and guidance on a weekly basis. Monthly 121s and regular team meetings.

Other contacts: External developers (weekly meetings), engagement with BACP staff.

Knowledge & experience:

- Educated to Degree standard or have an equivalent professional qualification or can demonstrate relevant work experience within Business analysis.
- Minimum 5 years' experience in system configuration, CRM techniques and workflows - Proficiency with MS Dynamics CRM is essential
- Knowledge of Agile methodologies is desirable
- Experience of managing delivery of a 3rd party contract is advantageous

Competencies

- Must be self-motivated, excellent communicator, able to explain complex concepts in a user-friendly manner, confident in leading meetings or group discussions
- Excellent inter-personal skills with the ability to influence and build solid working relationships at all levels and cross department to encourage joined up thinking.

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- Ability to work autonomously on multiple projects and priorities with diverse demands to meet objectives, targets and deadlines with excellent attention to detail.
- Matrix team management to meet deadlines and objectives, taking ownership and successfully delivering results in a fast-paced, dynamic environment
- Manage conflict and opposing opinions to conclusion by evaluating options and agreeing recommendations.
- Process improvement, both large, complex business changes and continuous improvement
- Identify and mitigate risk across multiple projects
- Identify and analyse problems and issues to drive resolutions with a solution-based approach using technical and professional knowledge whilst setting and implementing best practice of CRM.
- Ability to interrogate complex information and evaluate data to make firm recommendations

Job challenge:

A major challenge for the role holder will be to understand the business requirements and objectives for change to appropriately prioritise development holistically across the organisation whilst delivering maximum benefit.

Additional information