



## **JOB DESCRIPTION**

### **CRM Officer**

#### **Reporting to:**

Director of Fundraising

#### **Aim of the Job:**

As the charity's CRM Officer, you will support and maintain our business-critical CRM (currently alms.NET moving to MS Dynamics 365 during 2025 – 2026).

Working closely with Fundraising, IT, Communications and Finance charity colleagues and stakeholders, you will manage our CRM to ensure it is properly used, effective data management process workflows are implemented and maintained to ensure that supporters' data quality and integrity is compliantly maintained.

You will be the CRM product manager ensuring that World Horse Welfare can deliver on its fundraising, CRM and digital strategies. As CRM Officer you will be responsible for the management of the Change Request process, including both the gathering of detailed requirements for user proposed changes as well as the appropriate triaging of all incoming CRM requests and tickets to ensure they are correctly allocated for follow up against clear SLAs and that a feedback loop is in place to users and line management.

#### **Key Relationships:**

- Fundraising, Communications and Finance colleagues
- Senior Supporter Services Officer
- Head of IT
- Fundraising Technical CRM Project Manager (temporary consultant)
- Data Analyst
- Third party suppliers and IT professional networks: CRM, Microsoft, data cleansing bureaus

#### **Key Responsibilities:**

##### **CRM Management: estimated 70%**

- Excellent supporter data management including implementing effective data quality processes and workflows.

- GDPR and financial compliance via timely data updates of supporters' personal, communications preferences and financial data from users and third party suppliers.
- Collaborate with the IT team to ensure robust CRM security by managing appropriate user profiles and access protocols.
- Manage and implement changes to the Dynamics 365 configuration.
- Ensure data imports are reviewed for data quality, with validated data records imported and invalid exceptions investigated, resolved and then imported in a timely manner. Maintaining a Data Imports Log for reconciliation.
- Monitor all Data Integrations to report by exception any malfunctions leading to invalid data quality records and then work to resolve with IT and third parties in a timely manner.
- Maintain current CRM industry knowledge and personal professional development skills.
- Identify any upcoming or newly released CRM functionality to evaluate and recommend whether and how such functionality would improve the charity's business processes, as part of the periodic upgrade process.
- Develop and deliver functional and user testing sessions when needed (upgrades, new functionality, reported bugs, systems integrations, data migrations, automated testing).
- Manage users, user profiles and license allocation in collaboration with the Head of IT, to ensure efficient and cost effective licenses expenditure.
- Create and monitor a CRM KPIs Dashboard and Reports for data quality, change requests, tickets.
- Monitor and manage the CRM support emails and tickets, ensuring users are responded to and kept updated in a timely fashion.
- Lead on CRM third party supplier relationships and SLAs.

**CRM Collaboration & Change Management: estimated 25%**

- Liaise with charity teams to ensure their business requirements are fulfilled.
- Proactively collaborate with the charity's Fundraising, Communications and Finance teams for CRM related processes. Especially re campaign digital messaging and income processing.
- To embed cross directorate working via building key relationships and highlighting synergies across our working practices to deliver CRM efficiencies and improvements.
- Provide appropriate CRM inductions, guidance, advice and training for charity colleagues.

**General: 5%**

- At all times, adhere to the charity's policies and procedures.
- Undertake any other reasonable duties and requests from line management that are commensurate with the CRM Manager role.

**Person Specification:**

**\*\* All experience and skills are Essential unless flagged as Desirable.**

Experience:	Desirable:
<p><b>CRM MS Dynamics:</b></p> <ul style="list-style-type: none"> <li>• Advanced knowledge of Microsoft Dynamics 365 (2 years minimum) and the ability to pick up various IT systems quickly.</li> <li>• Strong experience of Microsoft Dynamics 365 configuration.</li> <li>• Microsoft Dynamics certifications in:               <ul style="list-style-type: none"> <li>○ Dynamics 365 CRM Fundamentals</li> <li>○ Dynamics 365 Customer Insights Journeys</li> <li>○ Dynamics 365 Sales</li> <li>○ Dynamics 365 Customer Insights Data Speciality</li> </ul> </li> <li>• Able to demonstrate operational management experience resolving first and second line daily operational challenges.</li> <li>• A good understanding of data protection and legal compliance.</li> <li>• A good understanding of Microsoft architecture and products.</li> <li>• Strong experience of the Power Platform (PowerAutomate, PowerApps, Power BI).</li> </ul>	<p><b>D</b></p>
<p><b>Knowledge &amp; Skills:</b></p> <ul style="list-style-type: none"> <li>• Strong ability to convey technical information to the non-technical.</li> <li>• Excellent time and workload management skills with proven experience of meeting deadlines including when under pressure.</li> <li>• Very good interpersonal, customer care and communication skills.</li> <li>• Ability to work as part of a team and on own initiative.</li> <li>• Highly organised and able to prioritise workload.</li> <li>• Excellent oral and written communication skills.</li> <li>• Strong attention to detail.</li> <li>• Knowledge of project management tools such as Asana /Slack.</li> <li>• Proven experience working in a busy fundraising and marketing charity.</li> <li>• Fundraising knowledge covering individual giving and donation handling.</li> </ul>	<p><b>D</b> <b>D</b> <b>D</b></p>
<p><b>Personal Attributes:</b></p> <ul style="list-style-type: none"> <li>• Good team leader.</li> </ul>	

<ul style="list-style-type: none"> <li>• An analytical, process driven mindset – able to understand complex business workflows or facilitate group sessions to understand workflows.</li> <li>• Experience of working effectively, with a wide range of organisations and individuals, able to build and manage positive relationships with stakeholders at the appropriate levels.</li> <li>• Experience of building strong customer relations, promoting ideas and influencing decision makers</li> <li>• Experience of delivering high standards of customer care and support services</li> <li>• Actively promote collaboration and being able to break down barriers to siloed working, connecting colleagues, teams, and initiatives.</li> <li>• Friendly approachable person with good organisational skills, enthusiasm, and energy, willing to undertake any reasonable task required of them.</li> <li>• Self-motivated and capable of working on own and working with others when required.</li> <li>• Flexible approach to work and be hands on to get the task done.</li> <li>• Excellent levels of discretion and judgement and experience of dealing with sensitive information.</li> <li>• Recognise and value all aspects of equality, diversity and inclusion.</li> </ul>	
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### CRM & Business Central projects 2025 – 2026

World Horse Welfare has for many years used the alms.NET database to manage its fundraising and marketing campaigns including c. 600k supporters with their millions of transactions. The system is a proprietary charity one which has been a reliable database system for the charity, with customisations.

With the increasing importance of digital and AI within the fundraising and marketing landscape to engage and retain supporters, allied with its five year strategy, the charity has decided to move to a MS Dynamics CRM system, in addition to replacing its current finance system with Business Central.

The CRM and Finance systems are transformative projects for the charity in 2025 – 2026 and the CRM Officer shall be expected to play a proactive, valued and visible role within the CRM project team and third party CRM suppliers.