JOB DESCRIPTION
for
CRM Manager

RESPONSIBLE TO
Director of Fundraising

MAIN PURPOSE OF THE JOB
As the charity's CRM Manager, you will support and maintain our business-critical CRM whilst working closely with colleagues and stakeholders across the charity. You will ensure the CRM system is fully utilised and that effective data management workflows are implemented to maintain the quality, integrity and compliance of our supporter data. In this role, you will act as the CRM product manager, enabling World Horse Welfare to deliver on its fundraising, CRM and digital strategies, driving data stewardship, donor journeys and strong data governance.

KEY RELATIONSHIPS
- Fundraising, Communications and Finance colleagues
- Senior Supporter Services Officer
- Head of IT
- Head of Digital
- Fundraising Technical CRM Project Manager (temporary consultant)
- Data Analyst
- Data Protection Officer
- 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 the change request process, triaging CRM requests from across the organisation against a clear SLA.

- 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.
- Ensure CRM governance processes are embedded including data standards, escalation routes, and quarterly reviews
- Ensuring CRM enables data driven fundraising journeys, effective donor stewardship, and is working towards predictive modelling in line with the charity's digital fundraising vision

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 regarding 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
Experience & Knowledge
Essential:

- Advanced knowledge of Microsoft Dynamics 365 and the ability to pick up various IT systems quickly.
- Strong experience of Microsoft Dynamics 365 configuration.
- Able to demonstrate operational management experience resolving first and second line daily operational challenges.
- A good understanding of data protection and legal compliance.
- A good understanding of Microsoft architecture and products.
- Strong experience of the Power Platform (PowerAutomate, PowerApps, Power BI).

Desirable:

- Microsoft Dynamics certifications:
  - Dynamics 365 CRM Fundamentals
  - Dynamics 365 Customer Insights Journeys
  - Dynamics 365 Sales
  - Dynamics 365 Customer Insights Data Speciality
- Knowledge of project management tools such as Asana /Slack.
- Proven experience working in a busy fundraising and marketing charity.
- Fundraising knowledge covering individual giving and donation handling.

Skills & Abilities:

- Excellent oral and written communication skills
- Strong ability to convey technical information to the non-technical.
- Excellent time and workload management skills with proven experience of meeting deadlines including when under pressure.
- Very good interpersonal, customer care and communication skills.
- Self-motivated and ability to work as part of a team and on own initiative.
- Highly organised and able to prioritise workload.
- Strong attention to detail.
- Ability to deliver on high standards of customer care and support services.
- Ability to build strong customer relations, promoting ideas and influencing decision makers.
- Ability of working effectively, with a wide range of organisations and individuals, able to build and manage positive relationships with stakeholders at the appropriate levels.

Personal Attributes:

- Good team leader.
- An analytical, process driven mindset – able to understand complex business workflows or facilitate group sessions to understand workflows.
- Actively promote collaboration and being able to break down barriers to siloed working, connecting colleagues, teams, and initiatives.
- Flexible approach to work and be hands on to get the task done.
- Excellent levels of discretion and judgement and experience of dealing with sensitive information.
- Recognise and value all aspects of equality, diversity and inclusion.