



Client Relationship Management (CRM) System Manager

Location: Fort Worth, Dallas, Houston, Austin, San Antonio, TX; or Atlanta, GA

Freese and Nichols, Inc. is searching for qualified candidates for a Client Relationship Management (CRM) System Manager who will serve as the owner of the company's **Sales and Marketing data**. This is a hands-on position that will be the go-to business analyst and technical resource for the company's **Cosential** CRM system.

This position will report to the Director of Marketing and work closely with Sales Leadership, pursuit teams, and practice leaders. This role has a strategic focus on the governance and management of data and how it can be leveraged to drive more effective Sales and Marketing. The CRM Manager coordinates processes and data integration with other internal systems including: Accounting, Business Technology, HR and Operations.

Key responsibilities of this role include managing CRM team, including external vendor; supporting annual Sales goals to meet corporate initiatives; managing the existing database of clients, prospects, contacts, opportunities, sales strategies, call reports, employee resumes, project descriptions, mailing lists, and other related data. Sales report creation and system training will be key responsibilities.

Primary Responsibilities

Processes/Procedures

- Establish database management procedures
- Evaluate current processes and make recommendations to improve existing processes
- Assist in implementation and management of proper data collection policies and procedures to ensure data quality/integrity

Training/Communications

- Create Cosential training program for Sales, Marketing and all users to ensure standards are met (i.e. training proposal writers in their role of keeping data current)
- Communicate CRM strategies or initiatives and assist with integrating the business organization with the Sales teams to deliver CRM capabilities
- Provide technical support to users as needed

Data Management

- Oversees maintenance and cleanup of Sales/Marketing data
- Analyze and updates existing data, eliminates irrelevant or duplicate data and researches correct information when necessary
- Use judgement and writing skills to ensure integrity of Sales/Marketing information, i.e. resumes, project descriptions

Analysis/Reporting

- Conduct analysis and trend identification, create and manage reports and query data to drive action-oriented insights for Sales leadership
- Analyze using analytic tools that track Sales key performance indicators
- Analyze data to identify segment targets based on behavioral data and feed intelligence back to Sales/Marketing leadership
- Create customized reports for Sales/Marketing needs



System Administration

- Ensure system is operational (including mobile version); troubleshoot issues with external database vendor; assign rights to new users
- Maintain close working relationship with external database vendor, as well as with internal Business Technology and Accounting groups

Qualifications / Requirements

- Solid experience with CRM systems; data analysis and metrics; experience with Cosential is preferred
- Excellent track record of managing Sales/Marketing data, preferably within the A/E/C industry
- Demonstrated ability to understand relational data and creatively problem solve
- Ability to understand Sales/Marketing needs and translate their requests into efficient queries and reports; effective in translating between end user's needs and database output
- Excellent communication skills including writing and editing; ability to diplomatically express ideas to both individuals and groups of all levels
- Analytical and detail-oriented; multi-tasking and time management skills
- Strong team ethic
- Bachelor's degree and a **minimum of 6+ years' experience** managing CRM systems
- Extensive experience in Microsoft Outlook, Word and Excel; Adobe InDesign is a plus
- Understanding of SQL is a plus
- Some minimal travel required
- Occasional overtime may occur

To Apply

If you are interested or know someone who is looking for a new opportunity, please submit a resume through our online career center at www.freese.com/careers.

About Freese and Nichols

With 750+ employees, Freese and Nichols is a professional consulting firm serving clients across the southern United States. With continuous improvement and sustainability in mind, Freese and Nichols plans, designs and manages major water and infrastructure projects for a variety of federal and regional clients, as well as local municipalities. In 2017 we ranked #10 in Fortune Magazine's Top 100 Best Medium Workplaces. We are also the first engineering/architecture firm to receive the Malcolm Baldrige National Quality Award. Learn more at <https://www.freese.com/careers>.

Freese and Nichols is committed to Equal Employment Opportunity (EEO) and prohibits employment discrimination for employees and applicants based on his or her age, race, color, pregnancy, gender, gender identity, sexual orientation, national origin, religion, marital status, citizenship, or because he or she is an individual with a disability, protected veteran or other status protected by federal, state, and local laws.