

JOB TITLE:	DATA & CRM OPERATIONS MANAGER
EXISTING ROLE	Permanent
JOB HOLDER:	
DATE COMMENCED:	
DATE UPDATED:	SEPTEMBER 2023

This job description is for guidance only and not part of the contractual employment terms. It should be revised at annual appraisal and at times of other major changes to the role. Please see guidance notes on the intranet for more information on completing it.

1 MAIN PURPOSE OF THE JOB

CRM application lead within the business, leading the creation and operational delivery of Data and CRM strategies to include application, reporting, insight and process optimisation. Leading the definition of internal requirements and changes and building the right case for delivery of prioritised change in a planned way. Lead on customer insight, persona and data collection and management offering expert guidance to internal stakeholders for maximisation of CRM value within the CIOB, emphasising a single view of the customers.

2 POSITION IN ORGANISATION

Reports to the Head of DDaT, working across the whole Institute and with key external vendors across the CRM and technology supply chain.

3 SCOPE OF JOB

- Manage the collation and planned delivery of all enterprise wide requirements for CRM related activity.
- Lead on data capture, analysis and providing insight.
- Take a technical lead role in project teams and workshop groups promoting best practice and innovation through use of Data and CRM.
- Program and project management of requirements, development and delivery.
- Deliver a Data and Systems service, managing the team's activity to meet defined performance indicators and business strategies.
- Advise and support the organisation with the ultimate aim of the majority of CIOB customer process being delivered through CRM.

4 DIMENSION & LIMITS OF AUTHORITY

Manager level authority in line with the current Delegated limits of Financial Authority.

Planning of budgets, (annual and project), Operational management of key suppliers including external development, data and software vendors. Operational management of the Data and CRM team. Project responsibilities as determined by the individual project RACI and scope.

5 QUALIFICATIONS

- Qualifications relating to CRM technologies, Project Management experience essential.
- Technical qualifications relating to business analysis, development, data or CRM product(s).
- ITIL v3 or v4 certification preferred.
- Relevant Membership or professional body qualification.

6 SKILLS & EXPERIENCE

- Experience running a high-pressure live support service, including co-ordination of day-to-day operational and project support, changes, and the delivery of emergency response to unexpected, high-impact incidents or problems.
 - Extensive experience of hands-on leadership of a Data and CRM teams delivering excellence in internal process management and delivery to internal and external customers.
 - Experience of creating and leading on the implementation of a Data Strategy for an organisation.
 - Understanding of information security and how to build services with security controls embedded.
 - Demonstrable experience of optimisation of customer life cycle activity (including prospecting, nurturing, conversion, and service management).
 - Experience of transitioning traditional application support/management models to more modern ones – e.g. product model.
 - Ability to coach technical and non-technical staff. Comfortable liaising and influencing at all levels, with both technical and non-technical stakeholders.
 - Excellent understanding of consent and preference data capture and Data Protection Legislation.
 - Enterprise mindset with the ability to innovate, be opportunistic, responsive, and resourceful.
 - Experience of acting as a product champion, working with recognised frameworks of business requirements management, development and delivery lifecycle planning.
 - Curious professional with an enquiring, analytical approach that encourages those around them to seek root cause and evidence based assessment and advice.
 - Experience of working with different stakeholders across an organisation that have different technical, functional, and non-functional requirements.
 - Ability to refine complex technical needs into business requirements and communicate technical matters to non-technical audiences.
 - Excellent understanding of MS SQL, MS CRM, and Power BI tools, as well as enterprise view of application and single view of the customer methodology.
-

DUTIES & KEY RESPONSIBILITIES

- Develop CIOB's strategy for Data and CRM life cycle management, advising business units on what is possible and where they should aim to develop their service offerings, ensuring simplification of transition into service.
- Leading on data, systems and innovations, shaping and implementing CIOB's data and systems roadmap, taking the lead in corporate working groups and project teams, promoting best practice and innovation in dealing with challenging situations.
- Support the development and implementation of effective customer lifecycle strategies and initiatives/campaigns to enhance customer satisfaction, retention, and loyalty, aligned with the business's overall objectives. Leverage data and technology to optimise the customer experience, improve customer interactions to help drive business growth.
- Lead and scope key CRM business requirements to support the delivery of the Departmental, Corporate and operational goals. Ensuring that process delivery is optimised, and the overall product backlogs are aligned to delivery goals.
- Play a major role in the DDaT Management Team and contributing authoritatively to the overall DDaT strategy, service plans and management of relationships with stakeholders.
- Lead the CRM team focussing on delivery of plans against target, ensuing the team are driven towards excellent, reliable and value driven services to the rest of the business.
- Lead system support services, including the provision, procurement, build, support of systems, services, and platforms.
- Lead the development of the annual Data and CRM budget. Ensuring that project activity includes consideration of system/process change and is accounted for during business planning.
- Ensure clear, efficient, and consistent process are delivered by the CRM team including collection and assessment of requirements, change management control, backlog creation and prioritisation.
- Lead the Data and CRM team in data collection on consumer insights concerning CRM programs and the business. This is for the purpose of ensuring that there is a consistency in data-driven decision making and strategy formulation within the Data & CRM team and in CRM campaigns and programs.
- Leads on the identification, creation and delivery of appropriate reporting solutions that enable evidence-based management and business decision-making.
- Ensures that the CIOB pursues appropriate and relevant Data management and governance policy and process.
- Ensure that documentation, standards and processes describing the team's work and outputs are recorded, kept up to date, are understood and used by staff.

PLEASE SIGN BELOW

PART 2: DUTIES & KEY RESPONSIBILITIES

JOB HOLDER:	MANAGER:
DATE SIGNED	DATE SIGNED:
DATE ON WHICH EMPLOYEE COMMENCED UNDERTAKING THIS ROLE	

Please forward a signed copy + an electronic copy to the HR department.