

JOB TITLE:	CRM SUPPORT & SOLUTIONS ANALYST
JOB HOLDER:	
DATE CREATED:	
REVISION (Office Use):	

1. MAIN PURPOSE OF THE JOB

This role focuses on supporting the optimisation of core systems' use and functionality. It involves collaborating with business stakeholders to identify opportunities to enhance processes, working with development teams to build test and deploy solutions; providing efficient technical support, troubleshooting and resolving issues based on service management principles; ensuring data accuracy and integrity, through regular data review and improvement; and enabling effective system use through effective and diverse user training and guidance.

2. POSITION IN ORGANISATION –

- This role is within Data & CRM team, part of the wider Digital, Data and Technology team, and is within the COO directorate.
- The role reports directly to the Data & CRM Manager.
- The role works across the business at all levels, and collaborates closely with colleagues across Digital, Data, and Technology and third-party technical partners.

3. DIMENSION & LIMITS OF AUTHORITY

- No budget responsibility.

4. SKILLS & EXPERIENCE**ESSENTIAL**

- Commercial experience with working in an application or CRM technical support role.
- A good understanding and experience of service management principles, such as managing incidents and requests using a ticketing system.
- Good understanding of data architecture to be able to understand how data is structured in a system, helping to effectively spot and fix data-related issues.
- Ability to perform simple cross-entity queries using a front-end tool to identify and improve data quality issues.
- Excellent and demonstrable problem-solving skills, able to think critically and has a high attention to detail.
- Experience with process improvement initiatives; working closely with stakeholders to identify improvement opportunities and pain-points, applying technical and system knowledge to design solutions, and see them through to deployment utilising existing development resources.
- A motivated and proactive individual who can demonstrate a track record of taking initiative, completing work at pace, working effectively both independently and as part of a team, and showing a willingness to take on responsibility and contribute to achieving shared goals.

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- Experience with supporting the design and delivery of system training to a diverse workforce, with a keen interest in technology.
- Excellent interpersonal, verbal, and written communication skills and the ability to interact in a professional manner with a diverse group of non-managers, managers, directors, super users and third-party software providers.
- Good understanding of key business concepts and their function within a technical application, such as Customer Services, financial transactions (Orders, Invoices, Payments, Direct Debits), and other bespoke business functions.

DESIRABLE

- Experience with Microsoft Dynamics CRM technical support, able to support the business with its function and help evaluate complex data using Advanced Find.
- General understanding of querying data using FetchXML and/or -T-SQL .
- An understand and experience of other service management principles, including problem and change management.
- Any experience working in a membership-led organisation would be an advantage.
- Technical, business analysis or solution design qualifications applicable to the role.

DUTIES & KEY RESPONSIBILITIES

CRM Application Support	35%
<ul style="list-style-type: none">• Providing CRM technical support services to the organisation as part of a team, ensuring that all user incident and service requests are logged, tickets contain accurate detail and categorisation, are updated with new information and progress, are troubleshooted and diagnosed through to resolution, ensuring that SLAs are adhered to (target of 90%), and users are kept informed, to ensure a high level of service.• Troubleshoot and resolve issues, and escalating to the Senior CRM Support & Solutions Analysts, or with third-party providers as needed.• Identifies areas for improvement in problem areas, to ensure that the system becomes less error-prone and likely to fail, resulting in fewer incidents, and greater accuracy of data.• Manage problems with root cause analysis through troubleshooting and diagnosis identification.• Maintain and expand upon knowledge base articles which provide specific solutions for known issues, and process notes for regular actions that can be shared within the team, or with users.	
Technical Business Analysis	35%
<ul style="list-style-type: none">• Supporting the initiative of continuous improvement of systems by working with the Senior CRM Support & Solutions Analysts, and CRM & Data Manager to identify improvement opportunities that will enable positive change such as for business initiatives, streamlining processes, and improving member attainment and retention.• Ensure that solutions consider systems beyond CRM, to cover Reporting, IT systems, Websites and Portals, to ensure that solutions are holistic and well rounded, utilising other subject-matter expert resources within DDaT where required.• Manage changes through the creation of Change Requests, meeting with stakeholders to understand and document business requirements and scope and working with third-party	

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development teams to deliver the implementation of changes, ensuring that changes are delivered to the correct standard, are tested, and implemented safely. <ul style="list-style-type: none">Ensures that changes are tested to an agreed and documented standard and supports the adherence of good testing standards across all Change Owners.	
Training	15%
<ul style="list-style-type: none">Support the design of training material and conduct training sessions for end-users to enhance their understanding and effective use of the system, aiming to cater for a diverse workforce who have different levels of abilities and learning styles.Maintain and create further training resources on the Intranet which provides available access to staff to refresh their knowledge and expand their learning.Maintain and create further knowledge base articles which provide specific how-to information that can be shared with or referred to by users.	
Business Support	10%
<ul style="list-style-type: none">Provide business and technical support to key business processes, such as annual renewals and product management.Create solutions that empower the business to self-serve, ensuring that processes are handed over to process owners or representatives in the business and ongoing support provided.	
Data & System Administration	5%
<ul style="list-style-type: none">Support the Senior CRM Support & Solutions Analysts in ensuring that the system is administered and maintained for optimal security, performance, function (configuration), data administration, quality and governance.Support the data strategy, which includes the monitoring and improving the quality and accuracy of data, through regular checks and corrections, and liaising and supporting data owners to correct data anomalies.	

This is not an exhaustive list of responsibilities involved in the role and the CIOB reserves the right to change the scope of job in line with the operational requirements.

BOTH THE EMPLOYEE AND MANAGER WILL ELECTRONICALLY SIGN THE JOB DESCRIPTION ON PEOPLE HR.