

Job Description

Job title: CRM Manager (MS Dynamics)
Reports to: Head of Insight and Information Systems
Responsible for: Information Systems Coordinator
Key Stakeholders: m-hance (third-party supplier), Operations, Fundraising and Supporters

1. Main purpose of job

Own and lead the continued development of East Anglian Air Ambulance's CRM system, MS Dynamics 365 (D365), be responsible for working with other stakeholders and third-party supplier to ensure operational processes and integrations are fit for purpose and compliant.

2. Main duties/responsibilities

- Manage a range of D365 projects that help EAAA build a more effective system based on the priorities of the wider Information Systems strategy.
- Be responsible for delivering KPIs and objectives, proactively providing real time reporting on progress against measures and addressing areas that need developing.
- Working with the Head of Insight and Information Systems you will be responsible for setting, monitoring, and reporting on CRM expenditure. Provide recommendations for budgeting, taking proactive steps to address overspends or capitalise on opportunities, to ensure the overall budget for the department is achieved.
- Manage all day-to-day activity related to D365, ensuring it is effective and compliant, installation of updates, be the in-house expert, manage user requests, and deal with problems as they occur. Escalating issues to the supplier as required.
- Line management of the Information Systems Co-ordinator, undertaking all associated line management responsibilities, including appraisals, regular one to ones to support the management of staff performance and in their professional development.
- Be responsible for ensuring the data is always up to date, secure, audited, cleansed and archived on a regular basis – developing procedures and business rules, and ensuring these are effectively briefed to the wider team.
- Ensuring full data governance and compliance with current regulations and internal policies. Reporting any data breaches

- Working with the Head of Insight and Information Systems to develop and deliver the long-term CRM and supporter data strategy for the charity, ensuring the system is an effective charity wide resource.
- Manage effective working relationships with all internal stakeholders and be the main account/contract manager with the CRM supplier.
- Develop an educational programme for users and provide effective training and resources relating to the D365 and associated systems.
- In line with business requirements manage and build D365 interfaces, using tools such as Power Automate, to ensure that data is effectively integrated with external platforms.

3. General duties/responsibilities

- From time to time, the post holder may be required to work at any of the Charity's sites in line with organisational needs.
- All staff must ensure confidentiality and security of information dealt with while performing their duties. They must comply with and keep up to date with Charity policies and legislation on confidentiality, data protection, freedom of information and computer misuse.
- All staff are required to adhere to and act consistently with all relevant health and safety legislation and Charity policies and procedures to ensure that their own and the health, safety and security of others is maintained.
- Staff will actively promote the Charity's commitment to equality and diversity by treating everyone with dignity and respect.
- All employees should take a proactive approach to personal development to ensure that skillsets are aligned to the demands of the role as it evolves and develops to meet the organisation's changing needs.
- All employees have a responsibility for protecting, safeguarding and promoting the welfare of children and vulnerable adults.
- It is the responsibility of all employees to conduct all business in an honest and ethical manner.
- Staff should uphold and demonstrate the Charity's values (reasoned, accountable, integrity, synergy and evolution).
- All staff should be aware of their responsibilities to protect the reputation of the charity e.g. social media and behaviour.
- Reporting incidents via the Datix system as part of an open and fair culture.
- Staff should be willing to undertake any activity as deemed appropriate by the charity that is in line with skills, experience and knowledge.

4. Person specification

Education and qualifications	
Essential	Desirable
	<p>Microsoft Certified Dynamics 365 Fundamentals</p> <p>Degree in one of the following: business and data management, statistics, maths, computer science, economics and business administration, marketing research, consumer psychology.</p>
Experience	
Essential	Desirable
Significant experience managing a CRM system in a target driven environment (business or not for profit), ideally MS Dynamics.	Specific experience managing and developing a MS Dynamics CRM system
Experience of managing or supervising staff.	
Business intelligence experience in a customer/supporter focussed role	Knowledge of supporter/customer journey planning
Good knowledge of UK Data Protection Legislation – with particular reference to GDPR	Undertaken Legitimate Interest Balance Tests and Privacy Impact Assessments
Knowledge and skills	
Essential	Desirable
High level of competence across the Microsoft Portfolio with specific reference to Office 365	Knowledge of SQL and statistical modelling
Ability to create segmentation in preparation for tailored supporter journeys	Use of Power BI
Use of reporting tools such as Power BI or Tableau	Use of MS Workflows and other Power Apps
Building CRM dashboards to monitor KPIs	Budget setting and management
Project management	Marketing automation management
Supplier management and contract negotiation	
Email marketing systems knowledge	
Personal qualities	

Essential	Desirable
Able to communicate and influence at all levels of the organisation	
Decisive and considered decision maker	
Excellent relationship management skills	
Strong organisational skills and a collaborative approach	
Full clean driving licence and own car	