

Job description

**Job title:** Insight and CRM Manager

**Reports to:** Head of Direct Marketing and Supporter Insight

1. **Main purpose of job**

The job has two key areas of responsibility, firstly that of providing business intelligence through analysis and insight to improve performance and meet supporter expectations of our fundraising communications strategy; and secondly as the controller of our new CRM, MS Dynamics. The CRM is the heart of all our fundraising activity and is used by all charity staff who are not directly operational; it’s efficient and accurate functionality is essential to the economic success of the charity

**Main duties/responsibilities**

***Business analysis and insight***

* Produce and deliver a data and insight strategy for the charity to give direction and guidance in how we can develop our information rich CRM to improve fundraising performance
* You will analyse key data using the insights gained to effectively forecast fundraising, providing the intelligence the team needs to deliver and develop marketing strategies to help achieve fundraising goals, maximising return on investment
* Using your specialist expertise, you will advise the fundraisers on their communications strategies supporting fundraising with the implementation of marketing automation processes to improve supporter journeys and ultimately increase response from our target audiences
* You will be responsible for developing and supporting the fundraising teams to deliver excellent personalised communications through multiple channels
* Through data gathering and analysis, identify ways to monitor and model performance, forecast and predict performance to identify key trends
* Support the marketing team with their test and learn programmes to identify best-performing activities for supporter recruitment and retention across a portfolio of products
* Develop and implement accurate and efficient BI and reporting frameworks that highlight risks and identify opportunities for improvement.

***CRM management and development***

* You will be responsible for making decisions regarding the development of the CRM to ensure that it is fit for purpose and can continue to deliver best value for the charity. This will include ensuring any updates are installed and managed and keeping up to date with MS technology innovations to identify which will be of value to the charity and enhance our performance
* You will be responsible for maintaining the CRM including delivering high quality data, system and process improvements, ensuring CRM architecture is aligned with other systems and any issues are resolved
* You will liaise with CRM provider to improve systems functionality, ensuring updates and new features that will benefit the charity are implemented as appropriate providing best value for the charity
* You will ensure that the system continues to develop in accordance with the charity’s needs, including integration with other MS systems, identifying opportunities for improvement and innovation
* You will manage the system and users on a daily basis, liaising with the supplier to resolve any issues
* You will train teams in CRM usage including creating and leading an internal team of advanced super-users acting as their virtual team leader (in respect of the CRM only) and be internal support for all queries and development requests regarding the CRM; ; advise on best practice, administer access and permissions, develop training manuals as needed.
* You will work closely with the Direct Marketing Team and support the fundraising and MarComms teams in developing supporter journeys
* Working closely with our IT experts you will ensure that we are obtaining the maximum benefit from integration across the charity from MS products
* Review the lottery CRM, looking for systems or a developer to establish if we can integrate into our CRM, or whether there are other opportunities to reduce dual data input.
* **Develop KPIs and dashboards** to assist with fundraising priorities and facilitate the ongoing monitoring of performance
* **Data governance** - review and maintain policies, ensure regulations are adhered to, reporting any data breaches and attending quarterly DP review meetings with the Head and SIRO; maintain a watch on the CRM and other integrated systems to reduce risk of any data issues
* **Working with the marketing assistant who will be responsible for:**
* **selecting and segmenting data for marketing campaigns** - with the aim of improving ROI or running test and learn projects
* **running imports and exports from CRM** - run routine checks, import data from external sources such as the lottery database, and manage Gift Aid submissions.

1. **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 in the course of 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 in order 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 in order 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 (community, passion, accountability, innovation, quality).
* 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 undertaking any activity as deemed appropriate by the charity that is in line with skills, experience and knowledge.

1. **Person specification**

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| **Education and qualifications** | |
| Essential | Desirable |
| Degree or related degree in one of the following: business and data management, statistics, maths, computer science, economics and business administration, marketing research, consumer psychology. | [Microsoft Certified Dynamics 365 Fundamentals](https://firebrand.training/uk/courses/microsoft/role-based/dynamics-365-fundamentals-certification) |
| **Experience** | |
| Essential | Desirable |
| Database management and development in a target driven environment (business or not for profit) | MS App development |
| 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 | Experience in the use of MS Dynamics |
| Ability to create segmentation in preparation for tailored supporter journeys | knowledge of SQL and statistical modelling |
| Use of reporting tools such as Power BI or Tableau | Use of Power BI |
| Building CRM dashboards to monitor KPIs | Use of MS Workflows and other Power Apps |
| Project management | Budget setting and management |
| Supplier management | Contract negotiation |
| Email marketing systems knowledge | Marketing automation management |
| Current Full UK driving licence & access to a vehicle |  |