

## **JOB DESCRIPTION**

Post Title:	CRM Manager
Department:	Operations/Business Development
Responsible to:	Business Operations Manager/Head of Operations
Supervisory responsibility:	Potential for: Officer level post(s)
Date of Issue:	February 2023
Salary band:	£34,373 – £36,371

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### **Main purpose of job**

The CRM Manager will be responsible for our business systems, ensuring they remain operational, maintained and developed in order to deliver against our organisational goals.

The role will work predominantly with the Microsoft Dynamics system implemented within the Business Development department of the organisation. There will be significant focus on delivering accurate reporting for customer insights, data security and ensuring best practice is adopted by all users.

You will be the first point of contact for internal queries and will work with various integrated applications to deliver sales and marketing campaigns to drive new customer acquisition, retention and engagement.

From time to time you may also be asked to support the wider organisation, working with the Microsoft Dynamics CRM used by the Campaigns, Communications and Operations teams. The role will also manage various tasks and projects relating to the information and data held by the organisation.

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### **Duties and responsibilities**

- 1. Manage the delivery, updates and maintenance of the of the CRM systems**
  - a) Develop new ways to meet customer and user needs
  - b) Coordinate working groups and user drop-in sessions
  - c) Manage external agency contracts and service delivery
  - d) Set up and administer user profiles and manage any updates
  - e) Train staff, create training materials and embed best practices
  - f) Ensure documentation produced by the CRM is fit for purpose, is updated and customised as required
  - g) Manage and monitor budgets and spending
  - h) Ensure compliance with the Data Protection Act, GDPR, PECR and data security
  - i) Deliver on requests for new information integration or collection

## **2. CRM development**

- a) Deliver process automation via customer portal development and implementation
- b) Identify and propose future phases of development needed including costings, internal and external resource scoping and impact
- c) Design and lead on new activities for customisation within embedded marketing applications
- d) Project management for new development phases including, budget management, staff training and user adoption

## **3. Reporting**

- a) Identify and set-up relevant reporting for various teams, campaigns and senior management including:
  - i. Customer insights: Retention, Attrition and Value
  - ii. Sales insights: Leads to Opportunity, leads to conversion and lead source reporting
- b) Run required reporting and deliver to relevant staff and teams
- c) Build and maintain live dashboards

## **4. Data and information**

- a) Management of information and data sets outside of the CRM including:
  - i. Product trackers
  - ii. Ingredients trackers
  - iii. Product management for VEG 1, ordering stock wholesaler account management
- b) Manage data integrity and security for migrating data outside Microsoft Dynamics systems into other Vegan Society portals or web applications

## **5. Cross-team working**

- a) Communications and Campaigns: Support with customisation possibilities as required
- b) Communications and Campaigns: Support as required with final build and delivery of a brand new CRM including data migration from a previous CRM
- c) Web: Ensure all systems are operating effectively with other web-based portals and applications

## **General:**

All staff are required to perform the following duties:

- Line management of staff according to their role
- Observe health and safety procedures and work safely at all times
- Contribute to wider organisational development and communications
- To be responsible for your own continuing self-development, undertaking training as appropriate to the working environment, location and developments in your role
- Undertake any other duties as required by your manager in order to meet the changing needs and demands of The Vegan Society
- Positively and actively promote The Vegan Society and its values

- Conduct yourself with professionalism, tact and diplomacy at all times as a representative of The Vegan Society
- Undertake training specific to your role

This job description is provided to assist the post holder to understand their principal duties. It may be amended in consultation with the holder without change to the level of responsibility or remuneration appropriate to the post. The job description is not exhaustive and you may be asked to carry out additional tasks which are appropriate to your job role, as required by your line manager.

### Data protection

During the course of your employment, The Vegan Society is required to tell you about the personal data that we collect about you and what we do with that information, including how we use, store, transfer and secure your personal data. You shall at all times comply with all relevant data protection legislation and all obligations imposed on you under The Vegan Society's data protection policy and privacy notice from time to time in force.

It is a condition of your employment that, as far as is possible and practicable, you adhere to a vegan diet and lifestyle.

### PERSON SPECIFICATION

ATTRIBUTES	ESSENTIAL <i>These are qualities of the ideal candidate</i>	DESIRABLE <i>This information could be used to differentiate applicants.</i>
Qualifications	English, Maths and Science GCSEs A – C grade or equivalent.	IT/Systems /Customer Service-related qualifications. PL-900 – Microsoft Power Platform Fundamentals.
Skills and experience	At least two years' experience of Power Platform, including Dynamics 365, Power Automate and Power BI. Experience customising Dynamics 365. Understanding of Datasets and Databases – Relationships between tables of data in the Microsoft Dataverse or Common Data Service. Experience creating workflows and automation within Dynamics 365 and Power Automate. Experience of integrating CRM and other applications. Demonstrate that you can competently	Track record of CRM development or coding. Appropriate experience in a directly related post. Experience of XpertDoc and ClickDimensions for Dynamics 365. Knowledge of Xrm Toolbox. Experience extending the functionality of Dynamics 365 with JavaScript based web resources.

	<p>manage data, analyse, manipulate and search data effectively for required information.</p> <p>Ability to create concise reporting for different audiences.</p> <p>Ability to establish strong working relationships with internal and external stakeholder at all levels.</p> <p>Ability to manage multiple priorities and work to deadlines whilst under pressure.</p> <p>Demonstrate you can hit targets, deliver desired objectives and outcomes.</p> <p>Be self-sufficient, creative and proactive in finding solutions to problems and challenges.</p> <p>Excellent written and verbal communication skills via direct and electronic communication channels.</p>	
<b>Knowledge</b>	<p>Knowledge of different CRM systems and their uses.</p> <p>Maintenance needs for CRM systems.</p> <p>How to capture customer insights and prioritise actions from feedback.</p> <p>How to manage complaints, suggesting and spotting opportunities to mitigate future issues.</p> <p>How to effectively manage relationship with third party vendors and agencies.</p> <p>How to coordinate cross-team needs whilst meeting deadlines.</p> <p>Understanding of The Vegan Society's values and purpose.</p>	<p>Understanding of working in/with NGOs or small charitable organisations.</p> <p>Knowledge of animal testing.</p>
<b>Personal qualities and competencies</b>	<p>Highly responsive to personal KPIs and how these contribute to the overall success of the team.</p> <p>Excellent interpersonal skills, including the ability to take and follow instructions, work well within a team, build positive relationships with colleagues in different teams, senior management and external stakeholders.</p> <p>Strong organisational skills with the ability to work using your own initiative and manage your workload.</p> <p>Calmness under pressure.</p> <p>Professional and responsible approach.</p> <p>Confident and friendly manner.</p> <p>Discreet and confidential.</p> <p>Articulate, proactive and outgoing.</p> <p>Efficient, organised, reliable and efficient.</p>	

	<p>Approachable and adaptable. Team player. Adhere to a vegan lifestyle for duration of employment. Willingness and ability to undertake appropriate training and development as required.</p>	
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