



### JOB DESCRIPTION

<b>Job Title:</b>	➤ <b>CRM Services Manager</b> (18 Month Maternity Leave Fixed Term Contract)
<b>Department:</b>	➤ <b>Information Technology</b>
<b>Salary Band:</b>	➤ <b>£48,000 to £52,000 per annum</b>
<b>Reporting to:</b>	➤ <b>Chief Information Officer</b>
<b>Direct Reports:</b>	➤ <b>Business Intelligence Developer, CRM Database Developer, Database Administrator, Database Analyst</b>
<b>Location:</b>	➤ <b>London office, West Kensington W14 8RR</b>

#### About us

Independent Age is a charity founded over 150 years ago to provide older people and their families with clear, free and impartial advice on the issues which matter to them. In 2015 we began an ambitious 5 year programme to greatly increase the impact of Independent Age by significantly expanding our services and campaigning activities. By 2020 we aim to:

- ✓ Have increased our support for the most vulnerable and in need by tenfold
- ✓ Distribute our resources to over one million people annually
- ✓ Respond to over 100,000 enquires each year
- ✓ Double the number of regular visits and calls to lonely older people
- ✓ Increase our influence on government

#### Our values



## **THE IT DEPARTMENT**

The IT Department is a key support function within the Resources Directorate and led by the Head of IT. Its primary purpose is to *support the delivery of the charity's strategic commitments to its many stakeholders*. This is achieved by providing a joined up approach to working across the charity in three core areas:

- i. Technology
- ii. Information Systems
- iii. Data & Information
- iv. Telephony

The department is a key support function and as such aims to provide a customer centric IT service which is innovative and where staff are provided with the tools, systems and support they need to be able to carry out their job roles efficiently and effectively in support of older people.

The team takes a proactive and collaborative approach to working and providing IT services across the whole charity. The team will ensure it is approachable, knowledgeable and, above all, helpful to all staff, trustees, and volunteers at all times.

The IT team supports both London based office staff, regional offices and home workers across Great Britain. Independent Age also hosts the Campaign to End Loneliness (CTEL) which operates out of Holborn Offices for which IT support is provided by the London Office.

### **Job Purpose**

The CRM Services Manager is a pivotal role in supporting Independent Ages CRM strategy and the wider delivery of services across the organisation. The role is based in the IT Department within the Resources Directorate with direct responsibility for developing, managing and supporting Independent Ages central CRM system, and other related systems including Sharepoint and Document Management. It has responsibility for data management across Independent Age and the integration of other systems and information stored within other data sources in order to provide accurate and relevant business intelligence reports, dashboards and KPI's. The CRM Services Manager will be responsible for:

- i. To take responsibility for the development and management of Independent Age's CRM systems and other related databases.
- ii. To take responsibility for the integration of external data from a number of sources including other systems, external agencies and web services.
- iii. To ensure that the CRM system and other related systems are sufficiently maintained, developed and supported to meet the current and evolving needs of the organisation.
- iv. To manage services and regular processes to effectively maintain the integrity of the CRM system and to add value to the services it provides to all stakeholders.

To provide training to staff in all aspects of CRM functions and processes as they relate to their current needs and future requirements.

### **KEY RESPONSIBILITIES & DUTIES**

#### *Managing CRM Services*

- To provide leadership to the Database Assistant to ensure that personal and ongoing development plans are met and they are striving to provide an excellent CRM support service at all times.
- To build and manage the relationships with other teams engaged in using CRM systems across the organisation in order to identify and effectively support their current and future needs. This includes providing professional advice and consultation on CRM and database systems in general, as well as pro-actively promoting the services of the IT and Resources teams in support of planning and data analysis.
- Manage the relationship with CRM and other database suppliers
- To manage the administration of the CRM system and other related databases ensuring the security and integrity of contacts' data at all times.
- To take the lead on reviewing systems managed by the IT department and across the organisation ensuring they meet service requirements and are fit-for-purpose.
- To manage a programme of regular data housekeeping routines ensuring the data is accurate, complete and consistent at all times.
- To review processes and procedures and ensure these are relevant and correctly reflect the functions being performed.
- To ensure that standards are set and maintained within the CRM system to support teams more effectively and enable them to better understand their own data and information requirements.
- To take responsibility for managing the integration between systems (currently Visual Alms, Mendix, ThankQ, SunAccounts and Filestore DMS), ensuring Independent Age retains a single customer (360 degree) view of all contact record's.
- To work closely with teams using external agencies for data capture to ensure that data import requirements are met and to oversee the process of setting up data file transfer processes and routines with external agencies. This includes developing standard file formats, layouts and schedules for transmission of data.
- To set strict standards for the capture of data from third parties including the quality and security of the data and how the data will be used in-house.
- To work closely with all Heads of department to ensure professional data management plays an integral role in data management decisions and processes, and to ensure data is managed professionally throughout the whole organisation.
- To work closely with teams to implement necessary changes in data processing, coding and analysis for new projects and fundraising campaigns.
- To manage the transactional elements of Independent Age's committed giving programmes, including direct debit claims, standing orders and preparing Gift Aid Claims.
- Develop data management guidelines and protocols for Independent Age, including data protection requirements, ensuring all staff adhere to them in order to achieve the highest standards of service across the organisation.
- To manage and train staff on database functions and act as the point person for database use enquiries.
- To regularly monitor the performance of the CRM and other systems and ensure that the technology and systems are appropriate and working to a high standard.

### *Reporting and Analysis*

- Creation and running of standard and adhoc reports for staff and senior management from all database sources.
- Assist with data segmentation to support Independent Age's fundraising programmes, direct mail and online fundraising.

- Assist in collating, analysing and presenting data methodically and accurately about Independent Age's donor programmes for relationship development, fundraising purposes and reporting KPI's and business intelligence.
- Assist other departments in running and reconciling data from a number of disparate sources including CRM, Finance and other database sources.

#### Other Tasks

- To work with colleagues and support them in finding solutions to their needs.
- To maintain currency of knowledge with respect to relevant technology, software, equipment and systems
- To undertake other such duties as and when required which are commensurate with the post and its responsibilities.

*Job descriptions cannot be exhaustive and so the post-holder may be required to undertake other duties which are broadly in line with the above key responsibilities.*

*Independent Age is committed to equality of opportunity and of eliminating discrimination. All employees are expected to adhere to the principles set out in its Equal Opportunities Policy and all other relevant guidance/practice frameworks.*

## PERSON SPECIFICATION

Criteria	Requirements	Essential (E) Desirable (D)	Evidence Source: Application (A) Interview (I)
Education & Qualifications	<ul style="list-style-type: none"> <li>A degree or equivalent related experience in database management and administration</li> </ul>	<b>E</b>	<b>A/I</b>
Experience & Knowledge	<ul style="list-style-type: none"> <li>Extensive experience of maintaining and administering a CRM relationship database and working with large and complex data sets.</li> <li>Experience of designing and implementing data related business processes.</li> <li>Experience of managing interoperability between systems and creating data standards within CRM systems.</li> <li>Experience of using SQL Server and related applications in an operational environment.</li> <li>Experience of database cleaning, de-duplication and the importing and exporting of data.</li> <li>Experience in creating database queries, selections and reports and analysing and presenting data methodically and accurately for business intelligence purposes and KPI's.</li> <li>Experience of delivering user software training and providing a support service to a range of technical and non-technical staff.</li> <li>Experience of managing large and complex projects.</li> <li>Experience of monitoring database performance through SQL server and identifying and resolving issues.</li> <li>Experience of working with external database suppliers and data handling agencies.</li> <li>A good knowledge and understanding of Microsoft Office and its component parts, particularly MS Office Professional 2007 and above.</li> <li>A good understanding of database administration functions and the techniques used to maintain a stable, accessible, secure system.</li> <li>A good knowledge of .NET technologies</li> </ul>	<b>E</b>  <b>E</b>  <b>E</b>  <b>E</b>  <b>E</b>  <b>E</b>  <b>E</b>  <b>D</b>  <b>D</b>  <b>D</b>  <b>E</b>  <b>E</b>  <b>E</b>	<b>A/I</b>  <b>A/I</b>  <b>A/I</b>  <b>A/I</b>  <b>A/I</b>  <b>A/I</b>  <b>A/I</b>  <b>A/I</b>  <b>A/I</b>  <b>A/I</b>  <b>A/I</b>  <b>A/I</b>

	<ul style="list-style-type: none"> <li>• Experience and knowledge of marketing/fundraising information systems in either a charity or marketing organisation.</li> </ul>	<b>E</b>	<b>A/I</b>
	<ul style="list-style-type: none"> <li>• Knowledge and experience of using Visual ALms, ThankQ, Sharepoint and Document Management Systems</li> </ul>	<b>D</b>	<b>A/I</b>
	<ul style="list-style-type: none"> <li>• Experience of using and administering Sharepoint Server</li> </ul>	<b>D</b>	<b>A/I</b>

<b>Criteria</b>	<b>Indicates essential level required for role</b>	<b>1= basic 2= medium 3= high</b>	<b>Evidence Source: Application (A) Interview (I)</b>
<b>Skills &amp; Abilities</b>	<b>Influencing</b>		
	<ul style="list-style-type: none"> <li>• Managing relationships and partnerships</li> <li>• Working collaboratively</li> <li>• Communication and presentation skills</li> <li>• Negotiation skills</li> <li>• Networking ability</li> <li>• Adaptability</li> <li>• Empowering skills</li> </ul>	<b>3</b> <b>3</b> <b>3</b> <b>3</b> <b>3</b> <b>3</b> <b>2</b>	<b>I</b> <b>I</b> <b>I</b> <b>I</b> <b>I</b> <b>I</b> <b>I</b>
	<b>Intellect</b>		
	<ul style="list-style-type: none"> <li>• Intellectual capacity</li> <li>• Analytical ability</li> <li>• Conceptual thinking skills</li> <li>• Innovation and creativity</li> <li>• Numeracy and statistics skills</li> </ul>	<b>3</b> <b>3</b> <b>3</b> <b>3</b> <b>3</b>	<b>I</b> <b>I</b> <b>I</b> <b>I</b> <b>I</b>
	<b>Impact</b>		
	<ul style="list-style-type: none"> <li>• Can do attitude/perseverance</li> <li>• Results focus</li> <li>• Judgment/decisiveness</li> <li>• Commercial acumen</li> <li>• Diligence and resilience</li> <li>• Confidence/gravitas</li> <li>• Customer focus</li> </ul>	<b>3</b> <b>3</b> <b>3</b> <b>1</b> <b>2</b> <b>3</b> <b>3</b>	<b>I</b> <b>I</b> <b>I</b> <b>I</b> <b>I</b> <b>I</b> <b>I</b>