

Role and person profile

Post title:	CRM Governance and Support Manager	Location:	Manchester
Division:	Qualifications and Markets	Department:	Product Fulfilment - CRM
Responsible to:	Head of CRM	Responsible for:	Data Administrators, CRM Support Executives
Scale:		Cornerstone behaviours level:	Manager of performers
Post no:	3979		

Purpose

The post holder will bring professional expertise to introduce and embed the CRM governance framework across the business, supporting teams in their understanding and use of the framework. The post holder will manage and support the CRM support desk to provide first line support to CRM users, they will be responsible for identifying opportunities for continuous improvement and overseeing activity to identify and implement appropriate changes.

Key accountabilities

1. Development, implementation and ongoing management of the CRM governance framework, proactively monitoring and reporting on data quality. Working with end users to ensure adherence to relevant data governance processes.
2. Engage with data owners/ stakeholders (including external suppliers) who undertake work to cleanse and enhance their data, to ensure their compliance with required data approaches and to make best practice recommendations.
3. Act as the champion of data integrity on the CRM system, applying solid understanding of data management principles and best practice, and business data needs.
4. To provide leadership and management of direct reports including Data Administrators and CRM Support Executives.
5. Provide advice to the business on how to make best use of the CRM systems particularly in relation to data structures, queue, team and security profile set up. Train, coach and support end users as required.
6. Develop and deploy analytical solutions to teams. Investigate and engage with stakeholders on analytical requirements providing effective and efficient methods to support their KPIs and SLAs.
7. Collaborating with team members and stakeholders to build data products that enable others to work with reporting effectively and inform decision-making that solve business problems with data.

8. Act as a liaison point with external suppliers for issue resolution and support services as required. Taking ownership of issues and progress through to resolution, engaging with suppliers and external partners as necessary.
9. Support business teams in meeting and delivering AQA's business and strategic priorities by providing robust and timely CRM (Customer Relationship Management) solutions and data support.
10. Coordinate and manage activity for the regular Microsoft Dynamics CRM upgrades. This includes coordination of User Acceptance Testing (UAT) and production of all relevant documentation.
11. Own and manage the processes relating to user access, to ensure security and cost-effective use of the system. This includes the leavers/joiners/movers policies and the setting of security/role profiles and licence profile selection.
12. Develop, document, monitor and improve CRM policies and procedures, ensuring compliance with, and monitoring of adherence to, relevant legal, regulatory and security requirements.
13. Implement basic system configuration changes, eg adding teams/queues and amending role profiles/changing forms. Support the Agile approach to working by completing customisation, configuration or analytical requests where appropriate.
14. Champion the CRM systems and their benefits to colleagues across AQA at all levels.
15. Coordinate regular communications across the business to share key messages and successes.

General accountabilities

1. To model leadership behaviours with confidence and to get the very best from direct reports and teams by providing clarity, feedback, coaching and development, while continuously seeking to enhance performance in line with business objectives.
2. To comply with all AQA's policies and other legislative requirements, including but not limited to HSE, Equal Opportunities and ISMS.
3. Where business needs change, to undertake other responsibilities which are of a commensurate level outside the terms of this role profile.

Additional information and work pattern

The CRM team provide support to users of the CRM systems. At varying times of the year, our support may need to extend to include evening and weekend working in order to meet business need and deliver continuity of service. The postholder is required to be flexible in line with business need.

Person profile

Knowledge	Assessment
Good understanding of data and database structures and how these impact data use and business processes, ideally gained using Microsoft Dynamics CRM	A/I/P
Understanding of the implications of data cascade rules in CRM	I/P
Strong knowledge of data management legislation and best practice such as GDPR	I/P
Good understanding of the functionality offered by CRM and ACD telephony systems and how they can support enhanced customer experience and business processes	A/I

Understanding of systems that can interface with CRM (eg to input or extract data)	A/I
Knowledge of business process analysis techniques and management reporting	A/I/P
Qualification	
IT related qualification or demonstrable relevant experience for the role	A
Skills	
Possesses knowledge of data management, data structures and reporting systems/tools	I/P
Experience of managing significant volumes of data and providing management information and analysis to inform decision making	I/P
Able to deliver training, coaching and support	I/P
Is able to proactively contribute to change and continuous improvement to systems and procedures by applying a structured methodology	A/I/P
Is able to prioritise workload and to plan, monitor and review work to ensure effective delivery of a high quality output. Able to flexibly adjust plans when required	I/P
Demonstrates proactive collaborative working across functional areas to deliver shared goals	A/I/P
Able to take initiative and find solutions	I/P
Is able to consult, influence and negotiate with internal and external stakeholders and partners to produce desired outcomes	A/I/P
MS Product skills, especially, word, excel, power point and access, plus experience of reporting systems/tools	I/P
Leadership skills	
Set challenging targets and support people to achieve them	A/I/P
Manage performance of direct reports effectively	I/P
Work flexibly and adapt management style to get the best performance from staff	I/P
Experience	
Organising, controlling and directing an area of work, including the management of appropriate resources and teams	A/I
Experience of successfully developing teams to achieve business and personal goals	A/I
Data governance	A/I
Involvement in systems (ideally Microsoft Dynamics CRM) based projects to support and improve customer experience and related business processes	A/I
Analysing data to provide MI and recommendations to support business decisions	A/I/T
End-to-end management of system upgrades	A/I
Configuration of CRM systems desirable	A/I
Advised on and championed CRM systems and data management	I
<p>Assessment key (criteria to be assessed at the selection stage)</p> <p>A – application (it is essential to provide evidence on application for shortlisting purposes)</p> <p>I - interview T – test (or work sample) P – probation</p>	