

**JOB DESCRIPTION**

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| **Post:** | CRM Database Manager |
| **Location:** | Flexible – Bristol office or Hybrid |
| **Responsible to:** | Director of Finance and Resources |

# Purpose of Post

Play a critical role in digital transformation, developing our data infrastructure and CRM capability to support our organisational strategy, specifically to:

* Grow and engage supporters, developing strategies to support the roll out of an emergent individual giving programme, and developing an excellent user experience
* Transform access and reach to beneficiaries, enabling us to help them find the help they need
* Manage membership and supporter data to enable effective segmentation for communication and campaigning
* Develop our data integrity and driving change through more effective use of data analysis for decision making and communication. Ensure effective and consistent organisational uptake and utilisation of CRM systems and data policies

# Duties and responsibilities

The role requires someone with excellent analytical, numerate and stakeholder management skills, data management experience, and experience of supporting and championing successful CRM development and improvement within an organisation.

* Manage, maintain and improve the quality of data and records within the organisation’s two CRMs - Access Charity CRM (for managing supporter and medical professionals’ data) and Iizuka Case Manager (for managing beneficiaries’ data)
* Lead on training and education across the organisation to ensure consistency and priority of data management
* Improve and develop new processes for the use of data (email, telephone, Direct Mail, other electronic communication) to support the organisation’s digital strategy
* Ensure data records comply with Data Protection and Privacy guidelines, including UK GDPR
* To support the Individual Giving Strategy by developing and implementing CRM process which will support the strategy to grow and retain individual support for the organisation, including selecting and segmenting data for fundraising and communications activity
* Ensure that best practice guidelines for data management are followed - both in terms of collection (opt-in/out) and storage for use in future marketing and reporting
* Lead in the analysis, interpretation, reporting and presentation of data across the organisation to develop and support campaigning and insight
* Assist the DPO in ensuring teams remain compliant in relation to data protection, fundraising, and the provision of services by providing guidance and reviewing existing processes and policies and keeping these up to date.
* Take responsibility for changes to the CRMs to support organisational business need particularly where it impacts on marketing communications or the implementation of digital strategy
* Manage and review opportunities to develop and leverage Access Charity CRM and Iizuka Case Manager technical capability to improve business processes for internal and external users and support the organisation’s digital strategy - keeping up-to-date with current and emerging trends in CRM technology and best practice principles of data management
* Advise Senior Management on relevant data management issues and manage data management risks in the organisation’s risk register

# General responsibilities

* Attend events and activities throughout the UK on behalf of Together for Short Lives, as and when required
* To travel to meetings across the UK and visit children’s hospices across the UK
* On occasion, you will need to work outside of normal working hours due to travel requirements to attend meetings and / or events
* Adopt a positive approach to personal and professional development of self and others, engaging in regular one to one meetings and encouraging a continuous feedback culture
* To be aware of, and act on, relevant health and safety responsibilities as an employee of Together for Short Lives, and adhere to these wherever you are working
* To work effectively with volunteers, giving support and guidance as required
* To carry out any other duties as are within the scope, spirit and purpose of the post as requested by your Director

To work and behave in a way that reflects and supports Together for Short Lives’ values

**Person Specification**

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| **QUALITIES QUALIFICATIONS** | **ESSENTIAL**  Training in data management  A demonstrable commitment to continuous professional development for data, analytics and CRM development | **DESIRABLE**  Qualification in Data Management or other relevant qualification |
| **EXPERIENCE** | Demonstrable experience of leading data management and data policies within an organization  Demonstrable experience of using analytics tools to report on data and drive insight  Understanding of the links between data acquisition, CRM processes and marketing activity  Experience of training and educating different stakeholders to understand the importance of maintaining up-to-date and accurate data and information in digital systems such as CRM system | Experience gained in the charity / voluntary sector |
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| **KNOWLEDGE AND UNDERSTANDING** | Knowledge of data capture management  Thorough working knowledge of UK GDPR  Good understanding of email marketing tools such as Mailchimp  Good understanding of effective reporting on large data sets | Experience using Access Charity CRM (formerly thankQ)  Experience using Iizuka Case Manager CRM  An understanding of financial reconciliation |
| **SKILLS AND ABILITIES** | Skilled practitioner in CRM database segmentation  Good understanding of email marketing tools such as Mailchimp  Strong IT skills, proficient in Microsoft Office suite  Very good written and verbal communication skills and the ability to produce clear and concise database processes and instructions  Ability to work constructively in partnership with other groups and organisations and people at all levels | Formal project management training  Skilled at using data analytical applications such Power BI, Power Query, etc  Working knowledge of Microsoft Access |
| **PERSONAL QUALITIES** | Enthusiastic about data and CRM and how it can make a difference  Good team player, resourceful and willing to get stuck in  Proactive and energetic approach to work  Committed to the vision, mission and values of the charity | Empathy with the children’s palliative care sector |