

Role Description – CRM Manager

Role title	CRM Product Manager	Grade	3	Department	Service Innovation
Reports to	Director of Service Innovation			Direct reports	n/a
Key relationships / interfaces	Internal:	Leadership Team, Heads of Department, Marketing, Membership, Portfolio, Service Innovation, Volunteers and all other head office staff. To work closely with the Marketing Manager - Digital to ensure the full end to end processes are fully optimized.			
	External:	Supplier relationship with CRM service providers			
Role purpose	<p>To maximize the return on investment in the CRM system by optimizing understanding, consistency of use, adoption, data integrity and requests for development across APM.</p> <p>This is a hands-on role and you will regularly work with other stakeholders and cross-functional teams acting as a bridge between the technical and service innovation/business development teams to ensure the technology solutions are practical and meet the needs of the business.</p> <p>You will also be required to develop an ongoing training, implementation and communication plans to drive consistent and effective use and understanding of the CRM across teams.</p>				
Breadth of responsibility	This role will impact on all teams and departments in APM and although based in Service Innovation it will also need to support adoption and use of the CRM across all teams.				
Dimensions and limits of authority	Any changes or development required in the CRM will need approval through the agreed change/development process and are not at the discretion of this role.				
APM Values	<p>The role holder will be expected to operate in line with our company values of:</p> <ul style="list-style-type: none"> ▪ Progressive ▪ Warm ▪ Excellent ▪ Thoughtful 				

Key responsibilities / accountabilities	Key performance measures
General	
<ul style="list-style-type: none"> ▪ Lead on business and process change implementation, providing input and solutions in relation to the CRM system 	<ul style="list-style-type: none"> ▪ CRM seen as a valuable tool by the user community and something that supports them in being effective in their role ▪ Issues/problems are quickly analysed, and appropriate action taken to resolve ▪ Undertake relevant Salesforce training modules
<ul style="list-style-type: none"> ▪ Lead on a consistent and appropriate adoption of the CRM system across APM 	<ul style="list-style-type: none"> ▪ Regularly analyse usage ▪ Work proactively with teams to increase adoption via CRM Superusers and teams ▪ Ensure data and quality standards are adhered to across the organisation
<ul style="list-style-type: none"> ▪ Provide training and support through face-to-face training and production of online resources, for all teams to ensure maximum benefit from working with the CRM ▪ Ensure all training support documentation remains current and relevant to assist with consistent usage 	<ul style="list-style-type: none"> ▪ Ensure CRM capability per team is appropriate to role ▪ Provide ongoing support and training to existing employees ▪ Ensure all new employees receive appropriate training and understand the importance of the CRM to APM
<ul style="list-style-type: none"> ▪ Ensure the approach to data integrity in the system is regularly reviewed and action taken to ensure consistency and reduce duplication or inaccuracy 	<ul style="list-style-type: none"> ▪ Ensure data protocols are understood by all staff ▪ Set up of reports to assist with the reviewing of data protocol breaches ▪ Introduce creative ways to engage people in adhering to data protocols
<ul style="list-style-type: none"> ▪ Champion adoption of the CRM creating a wider understanding of the value it brings 	<ul style="list-style-type: none"> ▪ Be the CRM champion within APM and lead the CRM Super User group ▪ Implement new ways to add value ▪ Help existing and new staff understand the role of the CRM and what it can deliver
<ul style="list-style-type: none"> ▪ Work with teams across APM to identify priority areas for development that have the most impact, be it on customer satisfaction, revenue or improved ways of working 	<ul style="list-style-type: none"> ▪ Seek input from all areas of the business for development ideas ▪ Help assess and prioritise the ideas for development for submission via the Change Request process ▪ Identify clear business benefits for any proposed changes

Key responsibilities / accountabilities	Key performance measures
<ul style="list-style-type: none"> ▪ Work closely with IT and Digital teams, in addition to our suppliers, in order to deliver maximum benefit from the CRM 	<ul style="list-style-type: none"> ▪ Ensure proposed changes take into account the impact on the web and IT ▪ Regularly share ideas and concepts to move forward our IT and CRM strategy ▪ Appreciation of the wider IT strategy
<ul style="list-style-type: none"> ▪ Development of dashboard/reports which can be regularly updated with key performance information and shared with Managers across the organisation 	<ul style="list-style-type: none"> ▪ Regular reporting established ▪ Action taken on any improvement areas ▪ Positive behaviours recognised and re-enforced
<ul style="list-style-type: none"> ▪ Identify areas where the system is under-used or could provide improved ways of working and raise with the appropriate managers 	<ul style="list-style-type: none"> ▪ Scan the market for ideas and new opportunities to influence future development ▪ Join relevant forums and user group meetings to see what is being developed and promote ideas of value to APM
<ul style="list-style-type: none"> ▪ Continually review, maintain and improve processes that deliver benefit to both staff and members 	<ul style="list-style-type: none"> ▪ Challenge the status quo when there appears to be a more effective or better way to do things ▪ Minimise workarounds and maximise system capability ▪ Constantly look for process improvements

Person Specification – CRM Manager

Attribute	Description	Essential / desirable
Qualifications	<ul style="list-style-type: none"> ▪ Educated to degree level (or equivalent) or have comparable work experience. ▪ CRM/Data Management/Training 	<ul style="list-style-type: none"> ▪ Essential ▪ Desirable
Experience	<ul style="list-style-type: none"> ▪ Change management ▪ Project management ▪ Software development ▪ Data Management ▪ Working with interdisciplinary teams ▪ Proven success in leading CRM training and adoption processes ▪ Product Management 	<ul style="list-style-type: none"> ▪ Essential ▪ Desirable ▪ Desirable ▪ Essential ▪ Essential ▪ Essential ▪ Desirable
Knowledge	<ul style="list-style-type: none"> ▪ Fully understands the value the CRM can deliver ▪ Sound business, financial and process knowledge to assess impact ▪ Knowledge of common CRM software tools and their application 	<ul style="list-style-type: none"> ▪ Essential ▪ Essential ▪ Essential
Skills	<ul style="list-style-type: none"> ▪ Outstanding communication skills ▪ Analytical thinking ▪ Proven ability to develop and deliver effective training ▪ Presentation skills ▪ Solution orientated ▪ Report writing ▪ Project Management ▪ Problem solving skills 	<ul style="list-style-type: none"> • All Essential
Behaviour / competency	<ul style="list-style-type: none"> ▪ Creativity and innovation ▪ Enthusiasm ▪ Customer focus ▪ Developing and coaching others ▪ Influence and persuasion ▪ Initiative and proactivity ▪ Encouraging collaboration ▪ Resilience 	<ul style="list-style-type: none"> • All Essential