

Role Profile

CRM Administrator

Role Details:

Department:	Finance & Resources	Team:	IT & Facilities
Reports to:	Head of IT & Facilities	Responsible for:	No direct reports
Contract:	Permanent	Hours:	28 hours per week (0.8 FTE)
Salary Range¹: (+ London weighting if eligible)	£29,600 - £33,600 (FTE £37,000 - £42,000)	Salary Band:	F
Base Location: (London, Belfast, Cardiff, Glasgow or remote)	Can be based in any of our four offices or from home. Occasional travel to London to meet the wider team will be required.	DBS Check Required?	Y
Budget Holder?	N	Policy Owner?	N

Core Purpose:

Our CRM Administrator will be the primary owner of our CRM system (Microsoft Dynamics). They will work with internal teams and external partners to ensure the system meets organisational needs by managing and enhancing functionality, ensuring delivery of meaningful reporting and maintaining system integrity and compliance with data protection regulations.

Primary Objectives:

- Take ownership:** Act as product owner for the CRM system and the first port of call for advice and guidance
- Optimise and increase usage:** Work closely with internal stakeholders to optimise usage of the system and ensure the CRM is supporting the achievement of our organisational strategy
- Drive system development:** Design and implement a roadmap for ongoing development of the system based on business needs.
- Manage supplier relationships:** Manage the relationship with external partners, ensuring value for money and quality output
- Develop reporting capabilities:** Develop our reporting capabilities to drive decision-making based on robust evidence and insight around our members and service-users

Responsibilities:

¹ Please note our policy is to offer at the bottom of the salary band for new starters.

1. **Take ownership:** Act as product owner for the CRM system and the first port of call for advice and guidance
 - Act as first port of call for advice and guidance, triaging requests according to risk level and organisational priority
 - Provide 1st / 2nd line technical support to users making sure day to day access, processes and workflows run correctly
 - Implement small changes to the system as required
 - Ensure documentation of critical processes
 - Ensure compliance with data protection regulations and policies, working closely with the Data Protection Officer as required
 - Manage access to the system, overseeing licenses and security levels in line with agreed policies and procedures. Monitor usage to ensure best value for money out of licenses, proactively suggesting alternative arrangements where relevant.
 - Partner with the Marketing & Communications and Membership teams to maintain the ongoing link between the CRM and CMS
 - Monitor external environment to keep abreast of CRM best practice and Microsoft developments and identify how this can be applied at The Fostering Network.

2. **Optimise and increase usage:** Work closely with internal stakeholders to optimise usage of the system and ensure the CRM is supporting the achievement of our organisational strategy
 - Conduct regular training for new and existing users
 - Develop and maintain an internal network of CRM champions to promote usage of the system across the organisation
 - Provide relevant cross-organisational updates about system development and interesting insights
 - Develop a CRM SharePoint site to house relevant documentation, updates, and generally promote internal awareness of the system
 - Establish internal processes to improve and maintain data quality, supporting colleagues responsible for data entry to do so with efficiency and accuracy
 - Proactively identify and resolve issues in the system or the way it's being used, escalating to Head of IT and Facilities if required
 - Partner closely with the Finance and Data Manager (based in Northern Ireland) to ensure consistent approach to data management across all four countries

3. **Drive system development:** Design and implement a roadmap for ongoing development of the system based on business needs.
 - Identify areas for improvement based on organisational requirements
 - Develop and configure the system in line with the agreed roadmap, ensuring strong communication and change management with users to minimise disruption and optimise uptake of new solutions / ways of working
 - Work with Head of IT & Facilities and outsourced IT provider to promote integration between the CRM system and other systems within the organisation
 - Contribute to annual planning and budgeting to ensure ongoing development of the CRM is supported, developing business cases for investment where required.

4. **Manage supplier relationships:** Manage the relationship with external partners, ensuring value for money and quality output
 - Conduct regular reviews of supplier performance, working with the Head of IT and Facilities to make changes as required

- Ensure any outsourced development work is in line with organisational need and is delivered in time and on budget

5. **Develop reporting capabilities:** Develop our reporting capabilities to drive decision-making based on robust evidence and insight around our members and service-users

- Work with users to understand reporting needs and identify commonalities
- Improve the system’s reporting capabilities and design reports that will deliver against organisational need
- Champion the use of data in organisational decision-making, providing reports to Senior Leadership and Trustees as needed

6. **Team Working:**

- Work closely with the Finance & Resources to ensure that plans and priorities align with wider organisational plans and strategies
- Effectively represent the team and actively contribute at internal meetings and external events.
- Understand and adhere to The Fostering Network’s policies and practices
- Engage with and demonstrate commitment to The Fostering Network’s mission, vision, values and strategy
- Proactively engage with the performance development approach, taking responsibility for seeking appropriate development opportunities and taking part in learning.
- Take a relationship-based approach to your work, understanding that creating positive relationships with our internal and external stakeholders is central to achieving our objectives
- Undertake any other duties appropriate to the level in accordance to agreed procedures and guidelines.

Main Stakeholders

In addition to their immediate team, this role-holder will particularly work with:

Internal	External
Head of Membership Head of Marketing & Communications Data Protection Officer Senior Leadership Team Assistant Directors Heads of Team	External CRM partners (currently Trillium and Wanstor) External IT provider (currently Wanstor)

What we’re looking for:

Essential Knowledge, Experience & Qualifications

- 2+ years of CRM management experience using Microsoft Dynamics
- Experience working directly with membership or sales teams and implementing their requirements in the CRM system.
- Experience of delivering training and support to data and database users
- Ability to administer and configure a CRM system (custom objects, workflows, permissions, etc.).
- Familiarity with automating business processes, creating reports/dashboards, and data analysis/modeling.

Essential Skills & Attitudes

- Ability to successfully communicate with technical and non-technical stakeholders at all levels

- A proactive, collaborative, problem-solver
- Commitment to maintaining the confidentiality of information held by The Fostering Network
- Commitment to Equality, Diversity and Inclusion
- Commitment to The Fostering Network's mission, vision and values

Desirable

- Experience of CRM administration in a membership organisation
- Experience of CRM administration in a charitable organisation
- Familiarity with Netsuite accounting software
- Care experienced and/or lived experience of foster care