**Job Description**

**Post Title:** CRM Specialist

**Directorate:** Digital and Data

**Reports to:** Infrastructure Manager

**Direct Reports:** 0 permanent staff but responsible for contracted staff and contracts to deliver solutions

**Salary Band:** SP40 - 44

**Key Relationships:**

**Role Purpose**

* The role will be responsible for leading, managing and developing the CRM environment, ensuring a compliant approach which is aligned with best practice.
* Be the primary person for all CRM transformation, advice and support for CRM use across the WMCA and partners.
* You will be the domain expert on all things CRM, transforming the business to a well-managed CRM platform. You will also be the subject matter expert for the wider WMCA CRM services

**Responsibilities**

* To develop a CRM strategy in line with the Digital and Data Strategy and implement the outcomes required, that drives changes throughout the business and its partners
* Manage the delivery of the CRM services on our platform (Dynamics 365).
* Migrate legacy systems and data into the CRM platform
* Work with the business to transform operations into an optimised CRM platform
* Develop a “single view of the customer” ensuring data from corporate systems is visible to CRM users using integrations, APIs and appropriate other technology
* Develop customer facing portals to maximise customer self service
* Instil a culture of automation across CRM and Power Platform workloads.
* Development of plugins, workflows, integrations and apps
* Set best practice and policies in the CRM provision across Digital and Data and the wider business
* Define and manage security within the CRM system by using the appropriate tools and policies to secure the system.
* Recommendation of improvements to existing processes and products and working with business teams to achieve their outcomes
* Identify and manage risks, issues, dependencies and opportunities for CRM services
* Responsible for the availability and performance of CRM systems and generation of dashboards to monitor the environments
* Ensure that CRM systems are available in a disaster recovery situation by using appropriate technical resources within the environment
* Work closely with Architects to ensure we comply with all relevant requirements, capturing all relevant data and further develop the architecture to support at an enterprise level
* Working with Cyber Security and the Data Protection Officer to ensure that we are meeting required standards implementing tools that monitor and enforce policies.
* Work with external suppliers and agencies in implementing solutions utilising best practice and compliance with WMCA standards and policies
* Work with new and emerging CRM technologies to provide a modern, scalable CRM architecture

**Person Specification**

|  |  |
| --- | --- |
| *Please specify (X) whether the experience required is Essential (E) or Desirable (D)* | **Assessment Method** |
| **Experience** | E | D | App\* | Int\*\* | Other\*\*\*  |
| Extensive experience in using and developing Microsoft Dynamics CRM and Dynamics 365  | X |  |  |  |  |
| Experience within a CRM team with extensive experience developing CRM workflows, plugins, integrations, apps  | X |  |  |  |  |
| Any experience of Salesforce, Oracle CRM or other CRM platforms would be advantageous. |  | X |  |  |  |
| Alignment of CRM architecture against enterprise standards and principles | X |  |  |  |  |
| Solid experience in building resilient, scalable, and secure systems  |  | X |  |  |  |
| Experience of organisational security within a CRM environment | X |  |  |  |  |
| Experience of managing and prioritizing workloads |  | X |  |  |  |
| Understand and implementation of obligations around GDPR | X |  |  |  |  |
| **Skills/Knowledge/Abilities** | E | D | App | Int | Other |
| Knowledge of Microsoft Power Apps and Microsoft 365 |  | X |  |  |  |
| Extensive knowledge of Dynamics 365  | X |  |  |  |  |
| Extensive knowledge of Active Directory and ADFS services | X |  |  |  |  |
| Skills in transforming a business into a data driven customer centric organisation using technology | X |  |  |  |  |
| Solid ability to troubleshoot complex technical issues, often under pressure with tight deadlines. | X |  |  |  |  |
| The ability to form strong, mutual, and professional business relationships with internal business users, external partners, and suppliers |  | X |  |  |  |
| Proven ability to understand support and business needs and translate these to a working solution. | X |  |  |  |  |
| Experience of software development languages (C#, JavaScript etc) | X |  |  |  |  |
| Understanding of how Dynamics fits into the Microsoft Power Platform and the benefits that can be gained |  | X |  |  |  |
| **Qualifications/ Professional Memberships** | E | D | App | Int | Other |
| Degree Level or equivalent in an IT discipline | X |  |  |  |  |
| Either hold or be working towards an ICT related technical qualification or accreditation (e.g. MCSD or CITP). |  | X |  |  |  |
| ITIL 4 Foundation or higher |  | X |  |  |  |

\* Application

\*\* Interview

\*\*\* Details will be shared at interview stage

**Core Expectations**

Our culture is underpinned by what we do and how we do it. Our behaviours outline the ways we need to work to deliver success, become truly inclusive, and make the organisation somewhere where everyone can give their best contribution.

|  |  |  |
| --- | --- | --- |
| **Value** | **Competency** | **Behaviour** |
| Collaborative | Team Focused | Works as part of team, managing and leading. |
| Service Driven | Customer, resident and partner focussed. |
| Driven | Empowered & Accountable | Takes ownership and leads when needed. |
| Performance Focused | Ambitious and going the extra mile. |
| Inclusive | ‘One Organisation’ Mindset | Believe in each other’s expertise. |
| Open & Honest | We do what we say we are going to do. |
| Innovative | Forward Thinking | Embrace change and open to new possibilities. |
| Problem Solving | Go for clear and simple whenever possible. |

**Health and Safety**

All employees have a duty to take reasonable care for the health and safety of themselves and of other persons who may be affected by their acts or omissions at work; and co-operate with their employer so far as is necessary to enable it to successfully discharge its own responsibilities in relation to health and safety.

**Equality and Diversity**

To promote and champion equality and diversity in all aspects of the role

**Learning and Development**

To participate in and take responsibility of any learning and development required to carry out this role effectively.

**Performance Management**

To actively engage in the performance management process and take responsibility for managing performance outcomes.

**GDPR (General Data Protection Regulation)**

To ensure the reasonable and proportionate protection, processing, sharing and storing of WMCA information in accordance with the relevant legislation, corporate policies, and in the best interests of the data subjects (Data Protection/GDPR), the WMCA, our partners, and the West Midlands, in all aspects of the role.

**Other**

There may be a requirement to work outside normal office hours on occasion to meet work deadlines, give presentations, attend meetings etc., including a requirement to work within stakeholder and partner offices within the WMCA Constituent area on a regular basis