



Job Description

Job Title:	CRM Specialist
Directorate/Team:	Digital and Data
Location:	16 Summer Lane, Birmingham, B19 3SD
Responsible to:	Design and Development Manager
Responsible for:	N/A
Key working relationships: (internal)	Architects, Cyber Security, Data Protection as well as Service Users including Customer Services
Key working relationships: (external)	Existing technology provider suppliers as well as emerging technology suppliers.

Purpose of the Post

- 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

Accountabilities (Deliverables)

Responsibilities (Duties)

Strategic

- 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
- Migrate legacy systems and data into the 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
- 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

People

- Work with the business to transform operations into an optimised CRM platform
- Develop customer facing portals to maximise customer self service
- Instil a culture of automation across CRM and Power Platform workloads.
- 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.

Operational

- Manage the delivery of the CRM services on our platform (Dynamics 365).
- 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.
- Work with external suppliers and agencies in implementing solutions utilising best practice and compliance with WMCA standards and policies
- Ensure that CRM systems are available in a disaster recovery situation by using appropriate technical resources within the environment
- Work with new and emerging CRM technologies to provide a modern, scalable CRM architecture

Financial

Other

- The duties and responsibilities in this job description are not exhaustive and the jobholder may be required to undertake other duties within the general scope of either the level or nature of the post.

Person Specification (How Evidenced Key: A = Application, I = Interview, T = Testing/Assessment)

Requirements Candidates/post holders will be expected to demonstrate the following:	Essential / Desirable		How Evidenced?		
	E	D	A	I	T
Extensive experience in using and developing Microsoft Dynamics CRM and Dynamics 365	X		X	X	
Experience within a CRM team with extensive experience developing CRM workflows, plugins, integrations and apps	X		X	X	
Any experience of Salesforce, Oracle CRM or other CRM platforms would be advantageous.		X	X	X	
Alignment of CRM architecture against enterprise standards and principles	X		X	X	
Solid experience in building resilient, scalable, and secure systems		X	X	X	
Experience of organisational security within a CRM environment	X				
Understand and implementation of obligations around GDPR		X			
Experience of managing and prioritizing workloads		X			
Skills / Knowledge		E	D	A	I
Knowledge of Microsoft Power Apps and Microsoft 365			X	X	X
Extensive knowledge of Dynamics 365		X		X	X
Extensive knowledge of Active Directory and ADFS services	X			X	X
Skills in transforming a business into a data driven customer centric organisation using technology	X			X	X
Solid ability to troubleshoot complex technical issues, often under pressure with tight deadlines.	X		X	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	A	I
Degree Level or equivalent in an IT discipline	X			X	X
Either hold or be working towards an ICT related technical qualification or accreditation (e.g. MCSD or CITP).		X	X	X	
ITIL 4 Foundation or higher			X	X	X

Core Expectations

Health, Safety & Wellbeing	All employees have a duty to take reasonable care for the health, safety, and wellbeing of themselves and of other persons who may be affected by their acts or omissions at work; and co-operate with their employer as necessary to enable it to successfully discharge its own responsibilities in relation to health, safety, and wellbeing.
Equality Diversity & Inclusion	Promote and champion equality, diversity, and inclusion in all aspects of the role.
Learning & Development	Participate in and take responsibility of any learning and development required to carry out this role effectively.
Performance Management	Actively engage in the performance management process and take responsibility for managing performance outcomes.
GDPR	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.
Adherence to Policies	Be aware of and comply with all organisation policies.
Other	There may be a requirement to work outside normal office hours on occasion, including a requirement to work within stakeholder and partner offices within the WMCA constituent area on a regular basis.

Values

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 Focussed	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.

Additional Post Requirements

Essential Car User		Politically Restricted Post		Disclosure and Barring Service (DBS)		
Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	Standard <input type="checkbox"/>	Enhanced <input type="checkbox"/>	None <input type="checkbox"/>

Job Evaluation Details

Date Evaluated	Job Family	Level/Grade	JEP Reference