

JOB DESCRIPTION

Job title:	CRM & Automation Solutions Architect
Grade:	This post has been evaluated at Grade 6
Responsible to:	Head of Digital Development & Support
Date:	February 2021

Job purpose

In support of our 2030 Strategy, CRM solutions become a core enabler, and this role will be required to lead on and architect the overall solution design, working in partnership with third party suppliers, to support business processes and new requirements following best practice. Working with the executive sponsor and senior stakeholders, this role will provide advice and guidance and help to drive CRM strategy across the institution and be seen as a trusted advisor for CRM.

The role will also support the technical development and data management of the existing University CRM systems and associated technologies, currently Radius by Campus Management, Gecko Engage and HubSpot. Working within the Digital Development and Support Team you will be required to support other systems as required, and train other members of the team to support the CRM systems. This will involve work directly with the University's Growth Team, who are responsible for recruitment, and other key stakeholders in the organisation. You will influence the roadmap and strategy for the continuous development and improvement of our current CRM systems.

The postholder will be responsible for ensuring the integrity of the data held by the CRM system, the core configuration and for the co-ordination of data input, including the overseeing of data input by other staff. To support colleagues with their usage of the system and providing essential training.

In this role you will be provide system ownership and be the key contact between the third-party suppliers and the university. To ensure that all records and reporting comply with relevant data protection legislation.

You will have experience of leading on and delivering multi-channel automated CRM campaigns, will be comfortable using data segmentation and testing strategies to optimise communications as well as managing the data integrity of complex data sets and queries. You'll be comfortable leading on and taking ownership for our CRM systems and driving through changes to enhance our capabilities.

The role requires a high level of analytical skills and data driven thinking, attention to detail, and excellent interpersonal and team working skills. This is a pivotal role in the delivery of the University 2030 strategy through supporting the growth of our on campus and Falmouth Online recruitment, employability and B2B engagement.

Main duties and responsibilities

Strategic Development

- Lead on the development of a university wide CRM Strategy, working closely with the Head of Digital Development & Support and senior stakeholders.
- Architect and implement the overall solution design for CRM to assist digital transformation and achievement of 2030 Strategy ambitions as well as adhering to data privacy and security principles.
- Facilitate discussions around vision, strategy and business outcomes for CRM.
- Build relationships with key stakeholders and be seen as the trusted advisor for CRM.
- Take responsibility for adherence to design, coding and documentation standards for the project.
- Mentor and knowledge transfer to other team members to support resilience for CRM support.

Service Management and Development

- Manage changes, service requests and more complex incidents and upgrades for the CRM systems to a high standard following ITSM principles. Where fixes cannot be provided escalating to the third party supplier support desk and acting as the point of contact.
- Manage and control user administration, including updating issues logs, testing bug fixes, updating documentation and conducting data entry.
- Process joiners, movers, leavers accounts and associated system and workflow roles.
- Responsible for maintaining required standards of security and data integrity in line with best practice. This includes the data from integrations with other information systems.
- Overseeing and working with 'power users' to ensure that all records and reporting comply with relevant data general data protection legislation.
- Produce and manage production of data maps and data import procedures.
- System maintenance, including users, security profiles, views, forms, data processes and workflows.
- Define and report on data cleanliness strategy, e.g. duplicate contacts, orgs.
- Maintain CRM data structure to support creation of suitable template targets/segments for Campaigns.
- Creation and maintenance of automated data Imports, and ensuring Power Users understand how to recognise and report failures.

- Provide a high level of service to our customers and seek ways to continually improve the support service to our clients. Proactive and constantly seeking to learn and improve both self and team.
- Contribute to business system administrative duties and projects as and when they arise.
- Manage the service level agreement (SLA) with the third party supplier in terms of support and maintenance.
- Coordinate the CRM User Group, collaborate with Power Users on change requests and requests for projects.

Training and User Adoption

- Creation and support of online content i.e. learning materials, video's, reference material to support delivery of application support both within the team and for other departments, ensuring quality materials are produced with a consumer focus and to drive user adoption
- To deliver application training and support to power users, both through online materials and face to face delivery.
- To carry out training needs analysis to inform institutional digital skills development plans.
- To share application knowledge, solution expertise and adoption of existing technologies with the rest of the team to allow service excellence.
- To be responsible for keeping abreast of the CRM systems technology roadmap and potential upcoming changes, advising and updating the business areas.

Administration and management

- Contribute to relevant technical or other working groups/committees as determined by the Head of Digital Development and Support
- As instructed by the Head of Digital Development take the lead on other related projects if required. In liaison with University staff, partner institutions and external bodies, the post holder will be:
 - setting project objectives and milestones;
 - identifying responsibility for meeting agreed objectives;
 - producing costings for new processes and systems in line with the project plan, and present these costings to key stakeholders.
 - participating in collaborative decisions regarding new purchases arising from the project plan.
- To maintain appropriate records of learner development and resource allocation.
- To deliver promotional 'info bite' (show and tell) presentations as part of a coordinated user adoption communication plans and projects.
- To deliver excellent customer service in all aspects of the role.

General duties and responsibilities

- To work within and actively support the equality and diversity policies and practices of Falmouth University.
- To notify a more senior member of staff of any errors or concerns at the earliest opportunity.
- To participate in the annual Performance Development Review process.
- To ensure that the university's cross-cutting themes of partnership, equality and diversity and sustainability inform all activity related to the role.
- To ensure communications systems and practices support effective management arrangements and promote good relations with staff and students.
- To work within a framework of effective governance, ensuring compliance with relevant regulations, legislation/policies and procedures.
- To be responsible for your own continuing self-development.
- To undertake other duties not specifically stated above, which from time to time are necessary for the effective performance of the University's business without altering the nature or level of responsibility involved.

Health & safety requirements

In relation to health and safety, you are responsible for ensuring that:

- You comply with safe systems of work in operation within your work area.
- You work co-operatively with other staff who have responsibility for health and safety requirements.
- You report any health and safety concerns to your manager or other responsible member of staff as soon as these are identified.
- You attend training as appropriate to your role (see the relevant health and safety training grid for requirements).
- You may be required to undertake duties as a first aider (for which a separate allowance is paid).

You have a direct responsibility to ensure a safe and healthy environment for students under your supervision, by ensuring that:

- Falmouth's safety policies and requirements are implemented.
- Risk assessments are carried out for relevant activities (e.g. fieldwork, performances, exhibitions etc.) undertaken by students under your supervision, and that any resulting actions are taken and that safe working practices are followed.
- Correct and timely communication of safety issues to your both superiors and students as relevant to your areas of responsibility is carried out.
- You work within a framework of effective governance, ensuring compliance with relevant regulations, legislation, policies and procedures.

- Students under your supervision fulfill their responsibilities under the University's Health and Safety Policy.

PERSON SPECIFICATION

Job title: CRM & Automation Solutions Specialist

Attributes	Essential requirements	Desirable requirements
<p>Education and qualifications</p>	<p>Degree or professional diploma in a relevant subject, e.g. business, computing or related technology field, or equivalent level qualification and/or experience.</p>	<p>CRM systems qualification or certification.</p> <p>Digital marketing qualification or certification.</p> <p>IT Service Management qualifications such as ITIL.</p> <p>Training qualification or equivalent relevant experience in digital skills.</p>
<p>Experience and knowledge</p>	<p>Advanced operational knowledge and in-depth technical experience of implementing and managing CRM and marketing automation tools / systems in a HE context or similar large complex organisation.</p> <p>Advanced Microsoft excel user experience.</p> <p>Up to date understanding of relevant legislation and procedural implications with regard to personal data and information security.</p> <p>Experience of providing helpdesk and user support for business systems. Knowledge of ITIL and/or IT Service Management principles.</p> <p>Knowledge of database structures, data definition, data relationships and data integrity issues.</p> <p>Experience of administering business system security groups, permissions and roles.</p> <p>Experience of designing, delivering and managing the development of group and individual digital literacy skills.</p>	<p>Knowledge of Office365 power platform (Power apps, Power BI and flow).</p> <p>Experience of Business process reengineering (BPR).</p> <p>A working knowledge of University administration, business processes, systems and software.</p> <p>Previous experience and knowledge of one or more of the following CRM systems, HubSpot, Radius and Gecko Engage.</p> <p>Experience of CRM data integrations via API's.</p>

	<p>Experience of managing multiple projects with multiple deadlines.</p> <p>Demonstrable ability to quickly learn new tools and processes.</p> <p>Work independently with members of the user community to define and document development requirements.</p> <p>Knowledge of technical testing and user acceptance testing (UAT) practices.</p>	
Skills and personal requirements	<p>Ability to lead and influence stakeholders.</p> <p>Excellent communication skills including verbal, written, presentations.</p> <p>Demonstrable skills in business analysis and requirements documentation.</p> <p>Ability to communicate clearly and effectively at all levels and disciplines within the organisation, including sharing knowledge and developing productive working relationships with stakeholders.</p> <p>Positive approach to customer service.</p> <p>Very strong analytical and problem-solving skills using data to drive performance.</p> <p>Pro-active and passionate about technology.</p>	<p>Formal communications and/or customer service qualification.</p>