



## Job Description

<b>Job title</b>	CRM & Data Services Senior Officer
<b>Reporting to (post)</b>	Senior CRM & Data Services Manager/Deputy CRM Manager
<b>Responsible for line managing (posts)</b>	Fundraising
<b>Grade</b>	Grade D of Mind's salary scales
<b>Department/section</b>	Data and Supporter Relations
<b>Hours of work</b>	35 hours per week
<b>Budgetary responsibility and accountability</b>	N/A
<b>Post covers</b>	England and Wales
<b>Located at</b>	Stratford

## Purpose of job

We're Mind, the mental health charity. We won't give up until everyone experiencing a mental health problem gets support and respect. We provide advice and support to empower anybody experiencing a mental health problem and we campaign to improve services, raise awareness and promote understanding.

Mind employs over 450 staff and we have a team of volunteers. Most staff are based in Stratford, London, there is an office in Cardiff and there are a number of dispersed staff working across England and Wales.

Mind's is currently embarking on an ambitious CRM (Customer Relationship Management) project, which will move the whole organisation to Microsoft Dynamics 365 in a set of releases.

The CRM & Data Services Senior Officer will work closely with the CRM & Data Services Manager and be responsible for administering the day to day operation of the CRM database to ensure that it delivers the best possible information for teams across the organisation and for the charity's supporters. You will also be responsible for ensuring data quality is maintained and will be expected to positively contribute to innovation and improvement planning.

## **Scope of the job**

This role sits within the CRM, Data and Insight team, which is a centralised unit within the Fundraising department and is responsible for customer service and data management across the organisation. The team currently consists of Senior CRM Manager, Deputy CRM Manager, Data Quality Manager, Integrations Manager, CRM & Integrations Architect, CRM Training Manager, Senior Training Officer, Insight Manager, 2x Data Insight Analyst, 5x Senior Data Officers and a CRM and Data Services Officer.

You will initially work closely with the Fundraising and Communication teams, assisting in the implementation of marketing programmes to deliver actionable supporter and business insight for the charity.

You will also work closely with the rest of the organisation as we deliver an organisation-wide CRM to make sure data integrity is maintained and we support all Mind users.

Mind aims to ensure that our strategy and all our activities fully reflect the needs and interests of mental health service users, women, black and minority ethnic communities, vulnerable migrants, people who identify as lesbian, gay, bisexual, queer or transgender, and people with physical, cognitive or sensory impairments, with mobility impairments, or with learning difficulties, with full regard to their age, background and personal circumstances. You will be expected to contribute to this aim.

## **Key responsibilities**

1. To work with the Senior CRM Manager/Deputy CRM Manager to provide high quality data services and insight to support organisational activity, including but not limited to Fundraising, Membership, Marketing, Retail, Information and Finance Teams.
2. To respond proactively to all end user data queries, from basic questions about a data set, to writing and running complex data selections within the CRM database or SQL if necessary.
3. To import and update personal and transactional data promptly from internal and external sources into the database, ensuring compatibility of data fields and their contents and ensuring that correct data processes are followed and data is imported and updated promptly and appropriately.
4. To work closely with end users and maintain timely delivery of extensive, detailed and accurate data selections and segmentations to inform targeted communications with donors and/or supporters as well as facilitate monitoring of specific segment development activity and fundraising/marketing planning.
5. To proactively contribute to developing and improving CRM functionality, enhancing data quality, identifying areas of concern or improvement, devising processes to improve efficiency and quality of data to ensure best practice and maintain database configuration and functionality alignment to organisational needs.
6. To assist the CRM & Data Services Manager in the formulation of procedures, user guidelines and processes to ensure that end users understand and use the system efficiently and effectively.

7. To ensure that donors/supporters data held on the organisational database conforms to relevant Mind's governance principles and legislation (for example, GDPR and the Data Protection Act).
8. To support and champion system security, including organisational, departmental and individual access controls, and password protection.
9. To contribute to the running and claiming of gift aid when required, so as to maximise income from donations as well as ensuring validity of such claims.
10. To test new and amended software, ensuring that it is error-free and that it meets the requirements of the user departments and/or organisation.
11. To work closely with the team to identify and develop efficient data processes and systems, in line with the team SLAs, GDPR, the Data Protection Act and associated performance indicators.
12. To create new reports as required and on request from business units to support and inform business activity.
13. To assist with auditing of the system where relevant.

## **EXPECTATIONS**

1. To embrace and champion all things CRM at Mind and win the hearts and minds of all staff.
2. To enable all staff at Mind to realise the full potential of the existing and incoming CRM systems.
3. To breakdown any apathy/misunderstanding toward the CRM systems through the education and upskilling of all staff.
4. To attend and contribute to meetings, training sessions, and other events as required.
5. To attend and contribute to the supervision and appraisal process.
6. To adhere to relevant legal and statutory requirements including the General Data Protection Regulation (ensuring an appropriate level of confidentiality at all times), Health and Safety at Work Act (ensuring H&S of own and others at all times) and any other relevant/charity law.
7. To travel to meetings in England and Wales, which may require the need to work unsociable hours e.g. attending evening or weekend meetings or for overnight stay.
8. To ensure that all responsibilities and activities within this post are in accordance with the terms and spirit of Mind's mission, vision, values, objectives, policies, procedures and practices

9. To undertake other duties that may be necessary, compatible with the nature of this post

**Person specification:** CRM & Data Services Senior Officer

**Essential criteria**

**Experience**

1. Experience of delivering excellent customer care in a data environment.
2. Experience of gathering and refining business requirements, translating them into data specifications and implementing a solution.
3. Experience of MS SQL Server databases or similar SQL environments
4. Experience of administering large and complex CRM database systems and providing database user support.
5. Experience of administering data extractions (mailings selections) and data import procedures.
6. Experience of contributing to supporter journeys, integrated communication plans and supporter care strategies in order to improve the lifetime value of supporters.
7. Experience of producing analysis from customer/supporter databases to inform marketing strategies.
8. Experience of developing and documenting operational business processes, procedures and guidance.

**Skills**

1. Excellent organisational skills with the ability to manage and take responsibility for own workloads, handle multiple priorities and meet strict deadlines.
2. Ability to work independently, using own initiative, and as part of a team.
3. Clear-thinking, creative and innovative approach to dealing with issues and problem solving.
4. Excellent oral and written communication skills including producing analytical reports and process documents.
5. Ability to communicate with technical and non-technical colleagues at different levels of seniority.
6. Excellent IT skills including use of Microsoft Office Outlook, Word, Excel and PowerPoint.

**Knowledge**

1. Advanced working knowledge of SQL (version 2005 and above) including writing complex queries and creating stored proceduresAdvanced knowledge of Excel and Access.
2. Advanced technical knowledge of a range of database marketing techniques, including data structure in relational database management systems.
3. Knowledge and understanding of Mind's mission, vision, values and ambition and what this means in relation to this post and the ability to incorporate this into all aspects of work.

4. Knowledge and understanding of equality and diversity and what this means in relation to this post and the ability to incorporate this into all aspects of work.
5. General understanding of CRM and data protection principles.
6. Proven working knowledge and understanding of GDPR, the Data Protection Act and Gift Aid legislation.

**Other**

1. Willingness to travel occasionally and work unsocial hours.
2. Commitment to your own continuing professional and personal development.

**Desirable criteria**

1. Previous experience of using Microsoft Dynamics 365
2. Previous technical experience of Advanced CARE CRM system.
3. Understanding of fundraising functions.
4. Understanding of marketing principles and approaches and how they relate to data services.
5. Understanding of membership functions.
6. Direct or indirect experience of mental health problems.
7. Qualified to degree level education.
8. Experience of CRM systems within the charity sector.