



# Data and CRM Services Manager – maternity cover

## Job description

<b>Grade</b>	Grade E
<b>Type of contract</b>	18 months maternity cover
<b>Directorate</b>	Public Fundraising, Data and Supporter Relations
<b>Team</b>	Data & CRM
<b>Reports to</b>	Senior Data & CRM Operations Manager
<b>Responsible for</b>	Data and CRM Business Partner x 2, Data and CRM Services Officer
<b>Location</b>	Flexible - likely to be hybrid mix of homeworking and time in Stratford office.
<b>Hours</b>	35hrs p/w

### About the role

Mind's Data and CRM Department empower Mind to be data & insight driven; amplifying the collective impact of our charitable efforts so everyone with a mental health problem has both support and respect.

Together, we combine business intelligence, technology and engagement strategy to modernise our ways of working. Maximising the value we draw from our data to meet strategic business goals, we enable an insight driven culture of innovation and continual improvement: harnessing the power of data and technology to achieve our common purpose.

We work with our users, technology suppliers, IT & Digital Team, and marketing teams to ensure high quality and trusted data is seamless integrated to drive efficiency, effectiveness, and frictionless supporter experiences that connect people to the cause and enable us to raise vital funds to support Mind's work.

Our Data and CRM activities seek to improve trust and usability of our data through providing robust Data and CRM Operations, Development, Business Systems Design, and Learning and Adoption; seamlessly integrating data and analytics to remove siloes from our ways of working and improve supporter experiences.



As Data & CRM Services Manager you will lead a small team comprising of two Data and CRM Business Partners and a Data and CRM Services Officer and will be responsible for leading the management and maintenance of our suite of internal data driven processes, driving forward and facilitating the sign off of new processes that will enable Mind to be data driven and insight led.

You will report to the Senior Data & CRM Operations Manager, and will work with colleagues within the team as well as end users to improve understanding of and adherence to agreed processes. You will also work with suppliers and external consultants; and play a pivotal role as part of the Data and CRM Management Team in champion and progressing the Data, Insight and CRM Strategy so we can collectively meet strategic goals.

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 lead the Data & CRM Services Team and the business partnering approach, so the team deliver robust data and CRM services and act as the central point of contact for all data driven queries and requests.
2. Responsible for the day to day management of the busy Data & CRM Team Helpdesk and oversee its development to provide exceptional customer service to our internal customers.
3. Prioritise user requests, projects and team workloads; setting deadlines and driving work where required across multiple teams.
4. To immerse yourself into the current Data and CRM landscape at Mind and proactively contribute to future Data and CRM project goals.
5. To deputise for the Data & CRM Operations Manager when required and support them with decision making and leadership.
6. To lead and take ownership of producing a detailed suite of internal processes in order to provide clear and decisive guidance to both internal colleagues and end users.
7. To work Data & CRM Development Manager to ensure that all processes are robust and fit for purpose; and never compromising data quality.



8. To work collaboratively as part of the CRM Management Team to develop the Data, Insight and CRM Strategy taking the lead on turning policy in to a robust and manageable process.
9. To ensure all processes are fully documented and maintained on a regular basis.
10. To work collaboratively to understand and resolve blockers and bottlenecks that prevent agreement or sign off of processes in a timely and professional manner.
11. To design and implement a robust change-control process for any requested amendments or improvements to processes.
12. To own the data and web brief process, including being the first point of call for reviewing and assessing briefs that are submitted to the team.
13. To take overall responsibility for the management of the BAU ticket system (Zendesk), including building and delivering regular KPI reports.
14. To be responsible for the management of agreed SLA's, monitoring adherence and reporting on performance.
15. Managing CRM licenses and security roles for joiners and leavers.
16. Being the key CRM contact person for liaising with the Mind IT Team.
17. To build relationships with multiple teams across the organisation and ensure cross-team processes are working efficiently, embedding a supportive culture.

## Expectations

We are committed to becoming actively anti-racist in everything we do. This is a critical priority for Mind. We embrace diversity and understand that being an inclusive organisation, recognising different perspectives, will enable us to provide excellent services. We are committed to ensuring all our employees are treated fairly and equitably at work and promoting equity in physical and mental health for all.

### Role expectations:

- To embrace and champion all things Data and CRM at Mind, winning the hearts and minds of all staff.
- To understand the importance of good quality accurate data and proactively drive the speedy resolution of issues.
- To empower all staff at Mind to realise the full potential of the CRM systems and data driven processes, ensuring Managers and staff are supported and guided through the adoption of new ways of working.



- To breakdown any apathy/misunderstanding towards data and CRM systems through the education and upskilling of all staff.
- A desire for continuous improvement through seeking and sharing feedback and a willingness to learn from mistakes.
- To understand that the nature of this post will require flexibility in undertaking the role.
- Keep abreast of internal and external developments and respond accordingly.
- To attend and contribute to supervision and appraisal process, meetings, training, and other events as required.
- To adhere to relevant legal and statutory requirements including the Data Protection Act (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.

All members of staff at Mind are expected to embody our mission, values and competencies. This includes an expectation that they will:

- Show passion for what Mind does and the changes that we are making for people with mental health problems.
- Work collaboratively across teams, departments, locations and organisations.
- Stand up for what they believe is best and trust in themselves and each other.
- Be open to others and ourselves and show a commitment to learning.
- Be open to change and respond flexibly and quickly to the changing world.
- Demonstrate organisational awareness and see the bigger picture while working towards objectives.
- Communicate effectively, ensuring their messages are understood and that they strive to understand others.
- Value diversity and treat others with respect, showing sensitivity towards differences, promoting and encouraging diversity, and building on people's different skills and talents to enhance the quality of their own and other's work.
- Take responsibility for their decisions.
- Attend and contribute to Mind staff training and any other training identified as appropriate for the post.
- Occasionally travel to meetings in England and Wales and/or work unsociable hours, which may require the need for an overnight stay, evening and weekend work.
- Ensure that all responsibilities and activities within their post are consistent with the terms and spirit of Mind's mission, vision, values, policies and procedures.



- Adhere to relevant legal and statutory requirements including the Data Protection Act, Health and Safety at Work Act and relevant charity law.
- To be prepared to work flexibly (e.g. hot-desking, home-enabled working) according to business need
- Maintain an appropriate level of confidentiality at all times.
- Contribute to making Mind a greener workplace.

## Person specification

### Essential criteria

#### Leadership Skills

1. Excellent management skills at a senior level with strong motivational and leadership qualities and highly developed coaching & mentoring skills to support others to perform & develop.
2. Proactive approach with a focus on results and achieving goals, providing clear direction for the team and an ability to prioritise demanding workloads for self and others, driving work where required across multiple teams and projects.
3. Proven track record of owning and implementing strategic plans in a data-driven environment.
4. Experience of managing change at an operational level, with proven success in bringing about change in teams not directly controlled.
5. Excellent communication, people management and planning skills; ability to influence, persuade and interact effectively.

#### Experience

1. Good understanding of fundraising, customer service and CRM principles.
2. Experience of designing and managing operational cross-team processes.
3. Experience of reviewing and reporting on performance.
4. Experience of producing written documentation of a technical nature.
5. Experience of operational planning.
6. Experience of working with stakeholders of various ability, knowledge and seniority.



7. Experience of line management.
8. Experience of devising and documenting data best practice policies, process and training guides.

## Skills

1. A robust understanding of CRM systems, preferably Dynamics 365 and the importance of good quality accurate data.
2. Excellent verbal communication skills and confidence to chair meetings and work with stakeholders at all levels.
3. Ability to confidently facilitate decision-making and drive decision making in a positive and supportive manner.
4. Excellent written communication skills to write plans and processes that may be technical in nature using plain English and non-technical language.
5. Excellent self-management skills to work independently and as part of a team, using own initiative and being flexible and adaptable.
6. Ability to learn new systems and technology quickly and to a standard high enough in order to implement business context of processes.
7. Ability to confidently deputise for the Senior Data & CRM Operations Manager, leading and supporting a large team as and when required.
8. Excellent IT skills including use of Microsoft Office Outlook, Word, Excel and PowerPoint.



## Knowledge

1. 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.
2. 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.
3. General understanding of CRM, compliance and data protection principles.

## 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 working in a charity setting.