



Job Description

Job Title	CRM Project Manager
Responsible to	Head of Data and Supporter Relations
Department	Fundraising
Team	Data and Supporter Relations
Salary & Grade	Grade F of Mind's salary scales
Hours of work	35 hours per week
Length of contract	6 months fixed term until end March 2020
Location of work	Stratford, London

Purpose of the 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.

As part of an organisation-wide digital transformation programme, Mind is implementing Microsoft Dynamics 365 for CRM across the charity. 300 staff are now live as part of "phase 1" and 100 more are coming onto the system during this first phase as part of the 3rd and final release.

The CRM Project Manager will lead the project management of the CRM project going forward, through phase 1/release 3 and beyond into phase 2 as new enhancements are developed on an on-going basis.

Scope of the job

The post reports to the Head of Data and Supporter Relations and will work closely and collaboratively with colleagues across the organisation (including the Wales Office) and will work with volunteers/temporary staff/consultants as required. Data and Supporter Relations is a centralised unit located within the Fundraising Directorate and is responsible for customer service and data management across the organisation. The CRM Project Manager will take responsibility for co-ordinating the delivery stages for the design and implementation of the CRM in line with time, budget, quality and approach, with a particular focus on business improvement changes and stakeholder engagement. Rapport building and good communication are vital.

Mind aims to ensure that the needs and interests of mental health service users, women, black and minority ethnic communities, disabled people, lesbians, gay men, bisexuals, transgender and people of all ages are reflected in all its activities. You are expected to contribute to this aim.

Key responsibilities

1. Work with the internal teams and external suppliers to conclude a successful implementation of the new CRM system through release 3 of the first phase of implementation
2. After phase 1 of the project is completed and we move into phase 2, manage the change request “backlog”, prioritise and package up deliverable work into monthly sprints and co-ordinate the delivery of the enhancements month-by-month on an on-going basis
3. Scrutinise project scope, budget, timeline and success measures to ensure the project will be successful. Escalating any concerns that the structure needs adjustment
4. Manage supplier relationships to ensure delivery on budget, time and to agreed scope and quality measures
5. Align the CRM project with concurrent Digital Transformation (Contact & Supporter Programme), including the website upgrade and other system developments
6. Ensure the CRM project is managed within controlled but practical frameworks, pro-actively managing budget, risks and issues throughout the project life-cycle and in line with governance structures and sign-off
7. Pre-plan the resource capacity requirements and CRM project delivery team structure to deliver each stage of respective projects
8. Build relationships and rapport with colleagues to ensure empathy with the project and create a culture of support
9. Work collaboratively with colleagues to ensure efficiency of project delivery through excellent communication and consultative planning
10. Develop and manage appropriate project documentation including project initiation plan, risk register, issues log, communications plan; continuously monitor and report to the steering groups, Project Board and key stakeholders
11. Run a weekly project team meeting and give reassurance on project progress through use of Kanban and roadmaps or other appropriate tools
12. Play a key role in the monthly project board, chaired by the project sponsor (Director of Fundraising), by setting the agenda and giving project progress updates and risk register updates.
13. Hold regular calls with stakeholders to manage the various project strands efficiently
14. Engage all relevant parties, including key stakeholders, staff and volunteers, and ensure that they understand, and are equipped to deliver on their role and commitment to the project
15. Manage and deliver internal communications surrounding the project
16. Manage the transition of the new CRM and work closely with the process transformation team and relevant staff and volunteers, including planning and leading phased deployments
17. Escalate challenges early enough to allow senior sponsors to offer support in time to keep project progress on track

18. Deliver project closure and lessons learned reviews

Expectations

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

1. Show passion for what Mind does and the changes that we are making for people with mental health problems
2. Work collaboratively across teams, departments, locations and organisations
3. Stand up for what they believe is best and trust in themselves and each other
4. Be open to others and ourselves and show a commitment to learning
5. Be open to change and respond flexibly and quickly to the changing world
6. Demonstrate organisational awareness and see the bigger picture while working towards objectives
7. Communicate effectively, ensuring their messages are understood and that they strive to understand others
8. 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
9. Take responsibility for their decisions
10. Attend and contribute to team meetings, supervision, appraisal process, Mind staff training and any other training identified as appropriate for the post.
11. Ensure that all responsibilities and activities within this post are consistent with the terms and spirit of Mind's policies.
12. 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.
13. Maintain an appropriate level of confidentiality at all times.
14. Contribute to making Mind a greener workplace.
15. Deputise for the Head of Data and Supporter Relations as required.
16. Have flexibility in undertaking the role.

Person Specification

Essential Criteria

1. Experience of successfully managing IT / CRM / Database change projects across multiple departments
2. Experience working with platform based technology (e.g. Dynamics, Salesforce, Oracle etc.)
3. Experience managing suppliers
4. Experience of leading project delivery
5. Experience of taking a project through implementation stages up to a fully operational state and beyond
6. Proven track record of rapport building with multiple colleagues across an organisation; excellent interpersonal skills at all levels and with technical and non-technical audiences
7. Experience of developing and maintaining excellent on-going relationships with third party suppliers
8. Ability to communicate effectively, in one-one situations, small groups and before larger audiences, including facilitating workshops and group meetings
9. Knowledge of project management methodologies, processes and standards (e.g. Agile, PRINCE2)
10. Experience of influencing and negotiating with others in a way that results in buy-in to changes in ways of working and behaviour

Desirable Criteria

Knowledge or understanding of the mental health landscape.