Data & CRM Business Partner

Job description

Grade	D
Type of contract	Permanent
Directorate	Public Fundraising, Data and Supporter Relations
Team	Data & CRM
Reports to	Data & CRM Services Manager
Responsible for	n/a
Location	Flexible - likely to be hybrid mix of homeworking and time in Stratford office
Hours	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.

The Data & CRM Business Partner is an internal customer facing role, responsible for managing relationships with key CRM stakeholders, teams and Champions in order to improve ways of working. The role works closely with the CRM Project Lead assisting them with CRM project delivery. Reporting to the Data & CRM Services Manager, this role will bring expert customer service as well as account management skills and is expected to have a clear understanding of project management and support.

The role will also be responsible for ensuring that high data quality is maintained on our systems, promote best practice in CRM and data management and will be expected to positively contribute to innovation and improvement planning.

This role will work collaboratively across the Data, CRM & Insight teams and will work flexibly to apply their technical skills where there are needed.

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

- To assist the Data & CRM Services Manager in supporting business users, and working closely with the Business Systems Design Manager to ensure user, business and data requirements are accurately captured when scoping out new projects, determining and documenting a list of specific goals, deliverables, features, functions, tasks, deadlines for each.

- To adopt a business partnering approach with internal stakeholders in order to bolster cross-team working through regular meetings, consult and advise on pieces of work/projects that will have Data & CRM involvement and to empower users to feel confident in their use of data and CRM.

- To respond proactively to all end user data queries, from basic questions about a data sets, to creating reports and dashboards as needed.

- 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.

- To create new reports as required and on request from business units to support and inform business activity.

- 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.

- 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.

- 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).

- To assist the Data & CRM Management Team in the formulation of procedures, user guidelines and processes to ensure that end users understand and use the system efficiently and effectively.

- To support and champion system security, including organisational, departmental and individual access controls, and password protection.

- 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. To also deal with new data sources and developing/setting up processes and procedures around these.

- To assist with auditing of the system where relevant.

- To work flexibly across the team and provide your technical skills where they are most needed; and to undertake other tasks and projects compatible with the nature and grade of this post, as required.

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

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

Skills
- Excellent organisational skills with the ability to manage and take responsibility for own workloads, handle multiple priorities and meet strict deadlines.

- A robust understanding of CRM systems, preferable Dynamics 365 and the importance of good quality accurate data.
- Ability to work independently, using own initiative, and as part of a team.
- Clear-thinking, creative and innovative approach to dealing with issues and problem solving.
- Excellent oral and written communication skills including producing analytical reports and process documents.
- Ability to communicate with technical and non-technical colleagues at different levels of seniority.
- Excellent IT skills including use of Microsoft Office Outlook, Word, Excel and PowerPoint.

Knowledge
- Knowledge of SQL (version 2005 and above) advanced knowledge of Excel.
- Advanced technical knowledge of a range of database marketing techniques, including data structure in relational database management systems.
- 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.
- 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.
- General understanding of CRM and data protection principles.
- Proven working knowledge and understanding of GDPR, the Data Protection Act and Gift Aid legislation.

Personal Attributes and Behaviours
- Ability to work effectively under pressure, both independently and as part of a team and without close supervision; identifying priorities and consistently achieving key targets.
- Ability to work collaboratively and influence effectively across organisational boundaries to achieve goals.
- Effective communication skills, including the ability to explain and document complex technical systems and business processes for both technical and non-technical audiences.
- Ability to find creative solutions to complex problems and contribute with innovative ideas and solutions.
- Tackles tasks in a systematic, efficient and logical manner and uses collaboration to deliver more effective solutions.
- Able to take decisions independently and know when to take the initiative and when to refer for guidance.

- 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.

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

Desirable criteria
- Understanding of fundraising functions.
- Understanding of marketing principles and approaches and how they relate to data services.
- Understanding of membership functions.
- Previous experience of business partnering.
- Working knowledge of ETL tools.
- Direct or indirect experience of mental health problems.
- Experience of CRM systems within the charity sector.