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**Job Description**

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| **Job title:** | **CRM Manager** |
| **Department/School:** | **Marketing and Communications** |
| **Grade:** | **7** |
| **Location:** | **University of Bath main campus** |

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| **Job purpose** |
| As CRM Manager it will be your responsibility to make sure the University gains maximum benefit from its investment in Applicant CRM systems specifically in support of its student recruitment and conversion activities.  Providing specialist expert advice to system users, you will lead the processes, tools and practices required to deliver a sector-leading standard of communications, with both undergraduate and postgraduate prospective students, both before and after they apply.  You will be an ambassador for Applicant CRM across the institution, taking ownership of both the system and of ensuring that it is used to maximum effect for recruitment and conversion.  Based in the Marketing Department, you will work closely with a variety of departments across the institution including our Admissions teams, Recruitment teams, Faculty Marketing teams, Accommodation and academic departments. It is your responsibility to understand what each area needs from the system in order to communicate effectively with prospective students and to understand how the system can be best developed to deliver this. As such you will be the ‘Principal User’ of the CRM system which includes managing the relationship with our Computing Services department who are responsible for front-line technical support of the system.  The University has invested in one core CRM system (Microsoft Dynamics) which has been live since March 2016, and other specialist systems including Gecko and Click Dimensions, to manage the relationship with our prospective students. We are continually developing and improving our use of these systems. You will be responsible for continuing this work, managing a development roadmap which meets emerging business needs and takes appropriate advantage of innovation in systems, features and functionality.  You will be the owner of the student marketing and recruitment CRM protocols and processes, and be responsible for maintaining and developing documentation supporting the CRM operation across the institution.  You will also be responsible for identifying and managing development of CRM within the University for student marketing and recruitment purposes. This will include but not be limited to: third-party system integration, development of current systems to provide a greater experience for both internal users and prospective students, management information and improving current system processes. The role should also contribute expertise to wider rollout of CRM across the University as and when required. |

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| **Source and nature of management provided** |
| This role reports to the Head of Student Marketing: Undergraduate.  Providing support to postgraduate taught marketing and recruitment activities is also essential, so you will also work closely with the Head of Student Marketing: Postgraduate Taught). |

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| **Staff management responsibility** |
| 1 FTE CRM Data Officer |

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| **Special conditions** |
| The post holder will, from time to time, be required to undertake other duties of a similar nature as may reasonably be required by his/her line manager.  Occasional weekend work may be required for which time-in-lieu is provided. |

| **Main duties and responsibilities** | |
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| **1** | You will be the Primary User of CRM across the institution. Within this you will influence, advise and guide colleagues across the institution on CRM best practice, sector trends and system developments and how these can be utilised for the benefit of the University of Bath. |
| **2** | Manage the development of our main CRM system, Microsoft Dynamics, and all third parties related to our CRM operation. You will project manage any future integration of any third party systems and make sure current integrations are functioning correctly. |
| **3** | Responsible for the data structure and usage of the main CRM system and all third party CRM systems. This includes reviewing, developing and enhancing our current structures and practices. |
| **4** | You are responsible for making sure all supporting documentation is accurate and user-friendly. This includes developing all further documentation required and making sure all such documents are easily accessible to users. |
| **5** | Manage the relationships with our suppliers from the ‘business’ angle. This includes supporting our Digital, Data and Technology team who manage the support relationship for our main CRM system. |
| **6** | Responsible for the delivery of management information across the institution. You will work closely with the central and faculty marketing teams, recruitment andadmissions teams to maximise the positive impact the data within the CRM system can deliver to their work. |
| **7** | Monitor, advise and manage the finance associated with CRM. |
| **8** | Lead on the security of all CRM related systems including user, team and department. |
| **9** | Lead on CRM related GDPR compliance, including lead collection, usage and deletion / anonymization. |
| **10** | Work to continually embed CRM to a greater degree across campus using your influencing and negotiating skills to make sure others understand the benefits. |
|  | This is not intended as an exhaustive list of duties or a restrictive definition of the post but rather should be read as a guide to the main priorities and typical areas of activity of the post-holder. These activities are subject to change over time as priorities and requirements evolve and as such it may be amended at any time by the line manager following discussion with the post holder. |

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**Person Specification**

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| **Criteria** | **Essential** | **Desirable** | **Assessed by** | | |
|  |  |  | A/F | I/T | R |
| **Qualifications** |  |  |  |  |  |
| Education to degree level or equivalent with substantial experience or a graduate with proven relevant experience and equivalent experiential learning/work experience | ✓ |  | ✓ |  |  |
| Chartered Institute of Marketing qualification or equivalent experience |  | ✓ | ✓ |  |  |
| Higher degree or experience of postgraduate study |  | ✓ | ✓ |  |  |
| **Experience/Knowledge** |  |  |  |  |  |
| Significant experience of working in a marketing environment, including digital marketing experience | ✓ |  | ✓ | ✓ | ✓ |
| Experience of working in a marketing environment in Higher Education |  | ✓ | ✓ |  |  |
| Demonstrable experience of using a Customer Relationship Management system in a large organisation | ✓ |  | ✓ | ✓ | ✓ |
| Demonstrable experience of developing and implementing multi-layered marketing and customer management communication plans for CRM systems | ✓ |  | ✓ | ✓ | ✓ |
| Demonstrable experience of delivering projects on time and against objectives | ✓ |  | ✓ | ✓ | ✓ |
| Demonstrable experience of reporting and data analysis, including interpretation of results to inform future marketing planning and activities | ✓ |  | ✓ | ✓ |  |
| Experienced user of Microsoft office word processing, spreadsheet and presentation packages | ✓ |  | ✓ | ✓ |  |
| Evidence of effective team working and engaging and motivating others | ✓ |  | ✓ | ✓ |  |
| Experience of managing processes and procedures in a complex service-delivery environment | ✓ |  | ✓ | ✓ | ✓ |
| Experience of teaching/training other staff | ✓ |  | ✓ | ✓ |  |
| **Skills** |  |  |  |  |  |
| Excellent IT skills including word processing, spreadsheet and presentation packages | ✓ |  | ✓ | ✓ |  |
| Excellent organisational and project management skills | ✓ |  | ✓ |  |  |
| Ability to communicate and present effectively and professionally with a wide-variety of people at all levels | ✓ |  |  | ✓ |  |
| Excellent written and oral communication skills including report writing and copy-writing and/or editing skills | ✓ |  | ✓ | ✓ | ✓ |
| Information management skills including a high level of accuracy and attention to detail | ✓ |  | ✓ | ✓ | ✓ |
| Ability to think creatively to find quality solutions to technical and non-technical problems | ✓ |  | ✓ | ✓ | ✓ |
| Ability to analyse and present complex data clearly and concisely | ✓ |  | ✓ | ✓ | ✓ |
| Able to develop and maintain good working relationships across and outside the University. | ✓ |  | ✓ | ✓ | ✓ |
| Web-writing and/or editing skills |  | ✓ | ✓ | ✓ | ✓ |
| **Attributes** |  |  |  |  |  |
| Capacity for autonomous working as well as the ability to contribute as an active member of the team and be able to negotiate and consult with all those engaged internally with the Department | ✓ |  |  | ✓ | ✓ |
| Competent, conscientious and motivated with a methodical approach to work | ✓ |  | ✓ | ✓ | ✓ |
| Adaptable and flexible, with the ability to prioritise | ✓ |  |  | ✓ | ✓ |
| Customer focused | ✓ |  |  | ✓ | ✓ |
| Resilient and determined | ✓ |  |  | ✓ | ✓ |
| Flexible and able to cope with competing demands | ✓ |  |  | ✓ | ✓ |
| Diplomatic and willing and able to negotiate to achieve win-win / mutually-desired outcomes | ✓ |  |  | ✓ | ✓ |

Code: A/F – Application form, I/T – Interview/Test, R – References

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| **Effective Behaviours Framework**  The University has identified a set of effective behaviours which we value and have found to be consistent with high performance across the organisation. Part of the selection process for this post will be to assess whether candidates have demonstrably exhibited these behaviours previously. |
| **Managing self and personal skills:**  Willing and able to assess and apply own skills, abilities and experience. Being aware of own behaviour and how it impacts on others. |
| **Delivering excellent service:**  Providing the best quality service to all students and staff and to external customers e.g. clients, suppliers. Building genuine and open long-term relationships in order to drive up service standards. |
| **Finding innovative solutions:**  Taking a holistic view and working enthusiastically and with creativity to analyse problems and develop innovative and workable solutions. Identifying opportunities for innovation. |
| **Embracing change:**  Adjusting to unfamiliar situations, demands and changing roles. Seeing change as an opportunity and being receptive to new ideas. |
| **Using resources:**  Making effective use of available resources including people, information, networks and budgets. Being aware of the financial and commercial aspects of the University. |
| **Engaging with the big picture:**  Seeing the work that you do in the context of the bigger picture e.g. in the context of what the University/other departments are striving to achieve and taking a long-term view. Communicating vision clearly and enthusiastically to inspire and motivate others. |
| **Developing self and others:**  Showing commitment to own development and supporting and encouraging others to develop their knowledge, skills and behaviours to enable them to reach their full potential for the wider benefit of the University. |
| **Working with people:**  Working co-operatively with others in order to achieve objectives. Demonstrating a commitment to diversity and applying a wider range of interpersonal skills. |
| **Achieving results:**  Planning and organising workloads to ensure that deadlines are met within resource constraints. Consistently meeting objectives and success criteria. |