

Role Profile: CRM Business Analyst

Role updated: 25/02/25

Department	Division	Location	Salary Band
Income and Public Engagement	Public Fundraising	UK Any	D Mid
Reports to	Matrix Manager	No. of direct reports	Value-based behaviour
Supporter Data Manager			Individual Contributor

Purpose

Drive continuous improvement of the CRM solution through business analysis and automated testing, working collaboratively with the Supporter Data Manager and CRM Technical Lead to optimise efficiency and functionality.

Engage with stakeholders, the role delivers strategic insights into As-Is and To-Be process models, data structures, and interdependencies, translating findings into concise agile requirements that enhance operational effectiveness.

Main Areas of Responsibility & Accountability

- Proactively identify opportunities to optimise CRM system and articulate proposed solutions to the Supporter Data Manager and wide business users.
- Implement best-practice Business Analysis processes, tools, and methodologies to strengthen capability and drive meaningful change.
- Act as a mentor empowering and upskilling team members, embedding best practice business analysis and fostering a culture of innovation and continuous learning.
- Critically evaluate risks through the requirements gathering process, collaborating with teams to develop effective solutions that ensure project success.
- Ensure the accurate translation of business requirements into actionable specifications, prioritising high-impact initiatives that enhance operational efficiency.
- Provide key input and support for the continuous improvement of the Agile development process (SCRUM) by actively engaging in all ceremonies.
- Identify opportunities for how Dynamics365 can enable and improve business processes, ensuring technology solutions align with strategic objectives.
- Ensure Jira tickets are regularly updated to reflect accurate project progress.
- Extract and analyse data from multiple sources, applying SQL and other analytical techniques to inform decision-making. Build, configure, and execute automated test scripts to optimise performance and mitigate risks.
- Analyse and develop reporting requirements, providing key insights that strengthen the organisation's business intelligence architecture.

Key Decisions

- Responsible for making strategic decisions that ensure the successful realisation of project benefits, clearly defining and communicating proposed solutions to the project team and steering group.
- Lead on best practices, evaluating and implementing optimal approaches to enhance efficiency, drive impact, and align initiatives with organisational objectives.

Problem Solving

- Apply operational and business analysis expertise in Dynamics365 CRM to drive efficiency and strategic decision making.
- Proactively seek deeper understanding of challenges, making rational judgments based on available data, and delivering workable solutions to problems.

Key Interfaces

- Convey and interpret technical information, ensuring clarity and understanding when providing explanations.
- Effective communication involves adapting the approach based on the audience, particularly when delivering specialist or technical advice to facilitate informed decision-making.
- **Internal:** Income & Public Engagement and CRM Team.
- **External:** Suppliers.

Knowledge, Skills and Experience

Essential:

- Significant experience or professional qualification in Business Analysis.
- Demonstrable experience as a Business Analyst covering Agile requirements gathering and specification, data modelling and mapping, process re-engineering, and reporting.
- Developed communication skills, both verbal and written.
- Comfortable working with different stakeholder groups.
- Experience of applying industry standard process mapping techniques (e.g. BPMN, UML) to support process re-engineering.
- Experience of configuring and supporting the development of Dynamics365 CRM solutions.
- Experience of using automated testing tools such as EasyRepro.
- Creating end-user acceptance testing scripts, supporting the UAT process. Using SQL to extract data required to undertake analysis and investigation activities.
- Highly developed knowledge of Dynamics365 entity architecture.
- Applying different risk management techniques.
- Highly developed working knowledge of Jira.
- Excellent working knowledge of Microsoft Visio or other process mapping tools.

Desirable:

- Professional qualification in testing and experience of applying different test frameworks.
- Experience of Azure specific application development.
- Experience of writing technical documentation.
- Configuring and managing SharePoint sites.

Travel

In Country: Occasional

Global: No travel