



## Job Description

**Position title:** CRM & Data Support Volunteer

**Reporting to:** Quality Assurance & Impact Lead

**Status:** Voluntary and unpaid

**Suggested commitment:** Three days per week for approximately three months

**Location:** Tooting Works, London, with one agreed volunteering day from home

**Expenses:** Reasonable agreed out of pocket expenses reimbursed in line with the organisation's volunteer expenses arrangements

### About Us:

Business Launchpad supports young adult aged 18 to 30 from low-income backgrounds across London to pursue enterprising careers and achieve financial progress. We provide tailored enterprise programmes, one-to-one coaching and practical employability experiences designed to develop business and life skills.

Tooting Works is Business Launchpad's social enterprise and provides affordable offices, co-working spaces and supporting infrastructure for businesses and entrepreneurs. Profits generated through Tooting Works are reinvested into Business Launchpad's charitable activities.

Reception is an important part of the experience we provide to tenants, young adult, visitors, contractors and other stakeholders using the building.

### Job Summary:

The CRM and Data Support Volunteer will provide practical, supervised support with agreed data entry, cleansing, checking and record management activities. The volunteer will help us reduce identified backlogs, improve the reliability of organisational information and prepare agreed datasets for reporting or migration.

This is a time limited volunteering opportunity suited to someone who wants to develop practical experience of Salesforce, data quality and information management within a charity and social enterprise environment.

The Quality Assurance and Impact Lead will set priorities, provide instructions, review progress and approve any activity involving record merging, anonymisation, retention or deletion. Department Leads and designated data owners remain responsible for the accuracy and maintenance of information generated within their areas.

## What you will support us with

### CRM data cleansing and maintenance

- Review Salesforce records against agreed data quality standards and instructions.
- Correct incomplete, inconsistent or inaccurate records where the source information is clear and the correction has been authorised.
- Support agreed data entry and keep an accurate record of significant changes completed.
- Flag records that require investigation, judgement or a management decision.

### Duplicate record review



- Review potential duplicate accounts and contacts using agreed criteria.
- Help prepare records for controlled consolidation and support approved merges under supervision.
- Escalate unclear or complex duplicate cases before any change is made.
- Support the review of an initial backlog of more than 3,000 potential duplicate records.

#### **Alumni data cleansing and migration**

- Help cleanse, standardise and prepare historic alumni information for migration into Salesforce.
- Check records for completeness, consistency and appropriate formatting.
- Support the consolidation of alumni datasets to create a reliable baseline for future outcomes reporting.
- Support work on an initial dataset of approximately 380 alumni records.

#### **Data retention, anonymisation and deletion support**

- Support agreed retention, anonymisation or deletion activity only when directly instructed and supervised.
- Maintain a clear audit trail and pause immediately if any instruction or record is unclear.
- Follow confidentiality, data protection and information governance requirements at all times.
- Do not independently decide whether information should be retained, anonymised or deleted. The initial review may include more than 1,500 records.

#### **Tooting Works data preparation**

- Help prepare, clean and standardise agreed Tooting Works information before migration into approved systems.
- Assist with reviewing information held across existing databases and with digitising appropriate tenancy or operational records where agreed.
- Identify missing, duplicated or inconsistent information and refer queries to the relevant data owner.
- Support scoping across approximately nine existing databases or data sources, subject to the agreed technical plan.

#### **Salesforce reports, dashboards and KPI support**

- Help check agreed Salesforce reports against documented reporting requirements.
- Review report filters, fields and dashboard dependencies, and refer technical issues to the appropriate lead or specialist.
- Assist with routine dashboard refreshes, data collation and preparation of management information.
- Support outstanding KPI data entry, initially covering around 30 reports and 15 KPI records across six months.

#### **Other agreed data quality support**

- Support clearly defined historic data cleansing, standardisation or migration activities.
- Prepare datasets for controlled updates or reporting and apply agreed data standards.
- Work to agreed priorities and raise capacity, confidentiality or quality concerns promptly.

#### **Role boundaries and supervision**

This volunteer role supports delivery and learning. It does not own CRM strategy, organisational data governance policy, reporting requirements, or decisions about retention, anonymisation or deletion. The volunteer will work only within the access permissions and instructions provided.

- The Quality Assurance and Impact Lead will provide an induction, agreed tasks, regular guidance and feedback.



- Any irreversible, sensitive or unclear action must be paused and referred for approval.
- The volunteer is not expected to provide ongoing cover for an employee role or take sole responsibility for organisational data quality.
- Access to systems and personal information will be limited to what is necessary for the agreed activities.

## Initial volunteering priorities

1. Alumni data cleansing and migration
2. Duplicate record identification and preparation for controlled consolidation
3. Supervised retention, anonymisation and deletion activity
4. Preparation of Tooting Works data for migration
5. Checking and updating agreed Salesforce reports
6. Completion of outstanding KPI data entry
7. Other agreed historic data quality activities

## What we are looking for

### Essential

- Confidence using spreadsheets, databases or other systems that hold structured information.
- Careful attention to detail and an ability to identify missing, inconsistent or potentially inaccurate information.
- Ability to follow instructions, use documented processes and work within defined permissions.
- Good organisation and time management, including knowing when to ask for guidance.
- A responsible and discreet approach to personal and commercially sensitive information.
- An interest in data quality, CRM systems, reporting or information management.
- Willingness to learn and contribute positively as part of a team.

### Helpful but not essential

- Experience of data entry, record checking, data cleansing or administration.
- Familiarity with Salesforce or another CRM system.
- Experience of reports, dashboards, data imports or migration activities.
- Basic awareness of UK GDPR, data protection or responsible handling of personal information.
- Experience in a charity, social impact, workspace, membership or customer service environment.
- Salesforce Trailhead learning, training, certification or equivalent practical experience.

### Personal Qualities (Aligned to BLP Values)

- Growth Mindset - reflective, willing to learn and committed to improving data quality.
- Community Focused - understands that good information supports better outcomes for young adult and our wider community.
- Collaborative and Enterprising - works constructively across teams and takes initiative within agreed boundaries.
- One Mission, One Team - reliable, conscientious and committed to shared organisational standards.
- Positive and Solutions-Focused - patient with detailed work, raises problems early and helps identify practical solutions.



### **What you can gain from volunteering with us**

- Practical experience of Salesforce and organisational data quality work.
- Experience of working with structured datasets, reports, dashboards and migration preparation.
- An introduction to responsible data handling in a charity and social enterprise environment.
- Regular guidance and feedback from the Quality Assurance and Impact Lead.
- The opportunity to contribute to work that supports young adult and local businesses.
- A reference after satisfactory completion of the agreed volunteering period, subject to organisational policy.

### **Working relationships**

The volunteer will work mainly with the Quality Assurance and Impact Lead and may also work with Programme and Delivery teams, Tooting Works Operations and Lettings, Finance, departmental data owners and Salesforce or CRM specialists where required.

### **Volunteer arrangement**

This is an unpaid volunteering opportunity. The anticipated commitment is three days per week for approximately three months, including one agreed day from home. The specific days, hours and start date will be discussed and agreed with the successful volunteer. Reasonable flexibility will be considered.

The arrangement will be recorded in a volunteer agreement that sets out expectations, support, confidentiality, expenses and system access. It is not a contract of employment and does not create an employment relationship or entitlement to wages. Either the volunteer or the organisation may end the arrangement at any time.

### **Safeguarding, confidentiality and data protection**

The successful volunteer will be required to complete an appropriate induction and comply with Business Launchpad and Tooting Works policies, including requirements relating to safeguarding, confidentiality, data protection, information security and acceptable use of systems. Any checks required for the activities assigned will be explained before volunteering begins.

### **How progress will be reviewed**

- Agreed activities are completed carefully and within the volunteering period, taking account of the volunteer's availability.
- Records and datasets show improved completeness, consistency and usability.
- Approved changes are documented through an appropriate audit trail.
- Queries, risks and uncertainties are raised promptly.
- No unauthorised or inappropriate changes are made to organisational records.