

CRM Manager – 0.6 FTE Job Description

Leukaemia UK – Our Charity

Leukaemia UK is growing! We are expanding our team to achieve a step-change in income, profile and impact in 2025 and beyond.

We are a 'small but mighty' charity with one big ambition: to stop leukaemia devastating lives. Over the next 10 years we want to help save and improve the lives of more people with leukaemia through finding and funding life-changing research.

Despite progress in recent decades, someone in the UK is diagnosed with a blood cancer every **16 minutes** and survival rates are among some of the worst of any cancer. And the physical and psychological impact can be lifelong.

Our current strategy outlines our plan to increase our investment into ground-breaking world class research and policy development focused on improving access to kinder, more effective diagnosis, treatment and care for leukaemia and other blood cancers. To do this, we are embarking on a period of significant growth, investing strategically to grow our income, profile, influence, and engagement and impact.

As we begin the fourth year of this ambitious 5-year strategy, we are seeking a passionate and knowledgeable CRM Manager to help maximise the potential of the CRM in stewarding supporters and logging and providing insights into fundraising income.

Team

We are a close-knit team, who are all passionate about Leukaemia UK and putting those affected by the disease at the heart of everything we do. We are all focused on "keeping it real" with pragmatic, practical solutions, as well as ensuring that our charity gets the funding it needs to continue to help those diagnosed with leukaemia and other blood cancers.

From us you can expect fun and creativity, as well as great challenge and support. We may not be about the corporate life here, but we are all about delivering exceptional expertise and making a real change to people's lives.

Leukaemia UK and You

We are looking for a self starter who enjoys working across teams to provide solutions - there is a real opportunity here to take our fundraising CRM to the next level. You will embody our values of being curious, collaborative and bold! This role requires creativity and people skills, as well as the technical knowledge to deliver effective solutions. If you are not Salesforce Certified, we will support the successful applicant to achieve at least Salesforce Certified Administrator within the first year.

As CRM Manager you will be responsible for the integrity of the Salesforce database, ensuring data is imported and held effectively and can be used to steward supporters and stakeholders and provide insight to make important business decisions.

The role will entail some development work as well as routine tasks and the maintenance of a manual of standard operating procedures. This is an exciting opportunity to reconfigure the Leukaemia UK's Salesforce operation to meet the needs of our varying internal stakeholders. Although this role sits within the Public Fundraising team, you will work with teams across Leukaemia UK, ensuring that we have a 360-degree view of stakeholder relationships, You will also be the direct contact with our external Salesforce consultants, who work pro-bono to support our mission to stop leukaemia devastating lives.

CRM Manager – 0.6 FTE Job Description

Skills and Experience

- ✓ At least two years Salesforce administration experience, including development work
- ✓ Experience of the not-for profit sector and fundraising CRMs
- ✓ Self-starter with the ability to self-learn and quickly master new technology
- ✓ Excellent MS Excel skills
- ✓ Confident with data manipulation and analysis
- ✓ Excellent project management skills and a positive attitude
- ✓ Confident, independent worker
- ✓ Ability to meet deadlines and prioritise simultaneous requests
- ✓ Creative and analytical thinker with strong problem-solving skills
- ✓ Effective communicator verbally and in writing, able to explain complex topics in simple language

Role specifics

Overview

This document sets out to define the specific roles and responsibilities for the above role within Leukaemia UK. The roles and responsibilities defined within this document should be read in conjunction with the contract of employment for the person defined within this role. The particulars in this document do not affect the Terms and Conditions of Employment.

Item	Description
Department	Fundraising
Reports to	Head of Public Fundraising
Hours	22.5 hours/ week, worked over 3, 4 or 5 days per week 0.6 FTE - Full time hours are 37.5
Location	Contractual location is our Central London Offices We encourage hybrid working and staff are required to be in the office minimum of 2 days per month but regular office working is welcomed.
Salary Range	£40,000 - £48,000 FTE (pro-rata for part time) dependent on experience
Core Job Description	The CRM Manager is responsible for the day-to-day configuration, administration, support, maintenance and improvement of our database, working closely with staff across the organisation, the CRM Manager administrator will identify, develop and deploy improvements and new business processes.

CRM Manager – 0.6 FTE Job Description

Specific Responsibilities

Data

- Ensure Salesforce holds a complete record of interactions with supporters, including donations and communications history
- Oversee and assist with importing contact and donation data from third party websites and payment channels such as Stripe
- Champion data quality, highlighting data gaps and issues when identified and proactively working to resolve them
- Ensure data integrity of the CRM including donation coding, donor information, marketing opt ins and suppressions
- Perform regular data management including backups, cleansing, improvements, and de-duplication
- Understand, investigate, report and seek to rectify data quality issues
- Work with the Fundraising and Finance teams to ensure database coding is kept updated and completing urgent requests when required to facilitate financial reconciliation
- Identify opportunities for the charity to harness Salesforce data and functionality to better serve the charity's mission.
- Ensuring regulatory compliance and adherence to Charity GDPR policy and processes at every stage, and contribute to revisions and changes to compliance policies
- Extract relevant data for gift aid claims and prepare claim forms

Knowledge sharing and up-skilling

- Support and train all users to understand, utilise and optimise the data stored in CRM, as well as how to access and report on it.
- Help users to import relevant data quickly and easily with minimal manual intervention
- Answer quick queries and enquiries received from teams that use the CRM
- On occasion provide ad hoc training and query responses to end user teams
- Maintain and update standard operating procedures and training material

System Administration

- Serve as primary system administrator for the Salesforce environment with 20+ active users.
- Act as sole in-house CRM Specialist for Salesforce, maintain and manage the system and database by troubleshooting and problem-solving issues, and implementing solutions.
- Handle all basic administrative functions including user maintenance, modification of page layouts, generation of reports and dashboards, creation of new fields and other routine tasks.
- To be the Super User for our active system, with the responsibility of setting up CRM attributes, data list options, finding solutions to BAU problems.
- Gather detailed requests for improvements or changes to the system, and implement these changes as appropriate

CRM Manager – 0.6 FTE Job Description

- Automate processes using Salesforce tools such as process builder, flow automation, validation rules and other applications that you may recommend and implement.
- Manage existing integrations, and work across the charity and our Salesforce Partner to implement future development
- Identify, install and maintain appropriate apps from the AppExchange in line with business need.
- Document customisations made in Salesforce.
- Plan ahead for upgrades, seasonal releases and long term projects.
- Act as key liaison and relationship manager with BPI OnDemand, our Salesforce Partners
- Communicate with & support our Salesforce Partners with general tasks and understanding our Salesforce system
- Complete integrations with third party apps in line with our roadmap

General Responsibilities

- Be an active member of project teams ensuring CRM requirements are considered.
- Focus on professional development by identifying and undertaking training to develop relevant knowledge and skills.
- Actively promote the core values of Leukaemia UK whilst working towards achieving the strategic objectives of the charity.
- Represent Leukaemia UK in relevant charity sector initiatives and ensure that the charity continues to learn from and share information with internal and external stakeholders as appropriate.
- Promote equality of opportunity, diversity, and inclusiveness to ensure that the delivery of people management, policies, and systems through all aspects of the charity are fair, transparent and consistent, without prejudice or discrimination to any internal and external stakeholder.
- Carry out any other tasks deemed appropriate by Leukaemia UK