



Children's Hospices Across Scotland

## JOB DESCRIPTION – CRM PROCESS ANALYST AND IMPLEMENTATION LEAD

### Job Details

Job Title – **CRM Process Analyst and Implementation Lead**

Responsible to – **CRM Database Manager**

Job Family – **Fundraising and Communication**

Location – **Edinburgh/Stepps/Part**

**Remote working**

Salary – **CHAS Band 6**

### Job Purpose

The CRM Process Analyst and Implementation Lead, working together with the CRM Database Manager and IT Project Manager, is responsible for the successful scoping, design, and implementation of the CRM and associated processes for CHAS.

The role will represent all the functional areas within CHAS fundraising and finance teams and ensure their requirements are met, coordinating, and supporting the work streams within the functional areas alongside the subject matter expert for each area through discovery and into implementation. The role holder will pro-actively manage the organisations requirements and co-ordinate CRM users input into the system implementation process. The role is responsible for the delivery of user requirements through acting as the translation service into technical solutions and ultimately the realisation of business benefits.

This multi-disciplinary role will work as part of a small team providing specialist technical expertise to manage the CRM development. You will be responsible for reviewing all existing CRM process to ensure they are appropriate for the new system as well as managing the implementation of integrations with the CRM and third party applications.

### Main Tasks

- Analyse and improve business processes
- Manage the integration of third party applications with Raisers Edge NXT
- Support training of colleagues in new processes and applications
- Manage 3<sup>rd</sup> party technical solution rollout

### Job Activities

#### Technical Integration Lead

- Work within a project environment to plan, design, develop, and organise complex activities and projects which may require adjustment due to variable workload.
- Work within, and contribute to, the development of change control protocols

- Configure the CRM and third party applications in line with the project plan
- Lead the management of the integration of CRM and third parties through API's or other means
- Initiate, plan and modify work programmes, e.g. security enhancements, integration of new technology.
- Produce clear, concise and actionable project plans, providing a quality professional service.
- Collaborate with fundraising and supporter care teams to implement solutions for business goals
- Maintain sector knowledge for new opportunities and solutions that will underpin CHAS strategic aims through their adoption and deployment.
- Provide advice and recommendations for CRM projects
- Provide training to other Team members.
- Where required allocate work to other colleagues as part of a project implementation
- Carry out research and development to test or adapt changes to systems and / or security and infrastructure settings.
- Develop skill and knowledge of the CRM and wider ecosystem to allow the knowledge transfer to colleagues within CHAS.
- Analyse and understand data required for integrations between CRM and third party integrations

#### **Process Analysis**

- Review existing business processes, recommend and lead the implementation of process improvement/rationalisation/simplification taking advantage of new and/or existing technology and systems
- Develop new processes on best practice use of new technology to meet CHAS aims and objectives.
- Understand, manage and communicate customer and business expectations and timelines.
- Manage and run monitoring activities to ensure processes are being followed and CRM used effectively.

#### **Manage 3<sup>rd</sup> party technical implementation rollout**

- Liaise with and maintain the technical relationship with 3<sup>rd</sup> party support companies regarding implementation and integration process
- Liaise with third party support companies for support on the implementation of wider CRM ecosystem
- Liaise with third party supplier to facilitate any project work

#### **Third Line Support**

- Provide support to colleagues to provide advice on how to resolve issues.
- Provide escalation point to take ownership of more technical issues following the implementation of the CRM.
- Communicate nature of issue and resolution to Database team or affected users.
- Provide training to colleagues to enable them to support services without need to escalate.

#### **Health and Safety**

- Responsible for complying with the CHAS Health and Safety Management Policy and associated procedures and co-operate with CHAS in complying with its legal duties
- Use of VDU equipment more or less continuously.

- Occasional need to carry and move equipment without aids
- Responsible for the proper and safe use of IT equipment

#### **Information Governance**

- Responsible for complying with the CHAS Information Governance Framework and associated policies and co-operate with CHAS in complying with its legal duties

### **Responsibilities**

- Lead the analysis and development of existing processes to support the growth ambitions of CHAS and align with the move from Blackbaud Raisers Edge 7 to NXT.
- Research, propose and develop changes to policies, services and processes
- Train and support colleagues in the move to NXT
- As a process improvement expert you have freedom to act to address issues identified without reference to line manager working within change control and risk management mechanisms.

### **Dimensions**

- CHAS has in the region of 100+ processes that need reviewed.
- The fundraising team needs to raise £9million each year and have ambitious plans to grow this to £12million per year over the next 3 years
- The fundraising CRM is to integrate with the finance system (Sun Financial), volunteer CRM (Assemble) and CHAS website
- There fundraising team includes community fundraising, partnerships and philanthropy, high profile events, legacies and supporter care.

### **Decisions and Communications**

#### **Decisions**

- Produce clear, concise and actionable project plans, providing a quality professional service, Work to an agreed plan and within agreed change manage processes
- Required to work independently to ensure project objectives are met
- Works with a high degree of autonomy within the agreed management structure of CHAS,
- Participate in decisions on best course of action taken to solve complex issues
- Required to work without direct supervision, though daily routine tasks are set, agreed and assessed by CRM Database Manager
- Communicate regularly with the IT Project Manager on overall project objectives
- Required to deal with complex/sensitive issues, prioritise, troubleshoot and resolve, or escalate them as appropriate
- Required to research and evaluate new technologies and produce reports detailing benefits to CHAS

#### **Communications**

- Exceptional communication and presentation skills, with the ability to convey technical concepts to non-technical audiences.

- Required to build and maintain relationships with a number of external suppliers and service providers
- On a daily basis, communicates complex system information with the other members of CRM database team and staff and volunteers CHAS wide
- Initiates and contributes to the development and management of Policies and Procedures in line with CHAS Information Governance requirements
- Excellent interpersonal skills, with the ability to build rapport and trust with clients and stakeholders at all levels



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## PERSON SPECIFICATION – CRM PROCESS ANALYST AND IMPLEMENTATION LEAD

### Education, Qualifications, and Training

#### Essential

- Educated to a minimum degree level or equivalent or demonstrable experience plus additional specialist knowledge
- Minimum of 3 years' experience in an process analysis and system integration role

#### Desirable

- Post graduate level qualification
- Evidence of continued learning and recent study
- Business Process Analysis qualification

Method of Assessment – Application Form

### Skills, Abilities, and Knowledge

#### Essential

- Experience in implementation as a functional lead, CRM and fundraising systems
- Demonstrable experience of process analysis, process improvement and resolving complex issues where there could be a number options.
- Highly effective team working skills, with an ability to collaborate with others and develop strong and effective working relationships across an organisation
- Demonstrable experience of working in a project context within an organisation
- Evidence of highly developed planning and organisational skills through the management of technical projects and managing multiple work tasks.
- Evidence of a high level of communication and inter-personal skills, being able to represent the interests of team at all levels and positively influence internal and external contacts

#### Desirable

- Recent experience (in the last three years) of implementing Blackbaud NXT and wider ecosystem applications or similar CRM
- Experience of managing the development of third party API's

Method of Assessment – Application Form and Interview

### Experience

#### Essential

- Significant post qualification experience of working in process analysis and system integration projects
- Experience managing systems integrations projects
- Previous experience liaising with technical vendor and maintaining relationships
- Previous experience of CRM integrations and management

#### **Desirable**

- Experience working in the third sector

Method of Assessment – Application Form and Interview

## **Personal Qualities**

#### **Essential**

- Friendly, outgoing manner
- Positive and confident
- Personal drive, initiative and effectiveness
- Accountable for self, actions and decisions
- Ability to work under pressure
- As a process analysis specialist, this role requires prolonged periods of concentration when analysing data, developing solutions to problems or identifying inefficiencies and unnecessary complexities. It can be subject to frequent interruption to deal with emerging issues or priority incidents.
- Physical skills are confined to prolonged periods of use of desktop computing equipment, which require advanced keyboard skills required inputting and manipulating data.
- A demonstrable commitment to personal development
- Emotional resilience to deal with occasional exposure to emotional circumstances within the workplace.

#### **Desirable**

- None

Method of Assessment – Interview

## **Other Requirements**

#### **Essential**

- Willingness to travel between CHAS sites
- Willingness to work flexibly
- There will be a need to work face to face with CHAS teams on a regular basis

#### **Desirable**

- Full driving licence and access to car

Method of Assessment – Application Form and Interview