

JOB PROFILE: PROJECT MANAGER

Role:	Project Manager	Date profile last reviewed:	May 2026
Name:		Reports to:	Director Strategy & Impact

MAIN SUMMARY OF ROLE:

The Project Manager will be responsible for leading the planning, execution, and successful delivery of the CRM migration project. This role involves coordinating with directorates, departments, executive leadership team whilst managing project resources, ensuring data integrity, and minimising disruptions to business operations during the transition to the new Customer Relationship Management (CRM) system.

KEY ACCOUNTABILITIES/RESPONSIBILITIES:

- Coordinate vendor and contract management by supporting on contract negotiations, service-level agreements, and leading on delivery milestones with external suppliers, ensuring accountability and compliance with agreed terms.
- Act as the day-to-day liaison between the Fund and the external vendor representing the Fund's best interests and point of view.
- Assist in agreeing the project scope, objectives, and deliverables specific to the implementation of the CRM, ensuring alignment with strategic aims, business-as-usual and stakeholder expectations.
- Prepare and manage a comprehensive project plan, including detailed timelines, resource allocation.
- Maintain adherence to project timelines and budgets, implementing corrective actions when necessary to keep the project on track and within scope.
- Provide day-to-day project coordination support, including scheduling meetings and workshops, action tracking, decision logging and supporting effective communication across the project.
- Coordinate project governance processes, including preparation of Steering Committee and Working Group papers and the taking and timely circulation of minutes.
- Submit regular progress reports and budget updates to the Steering Committee, maintaining clear and succinct documentation in a well-structured and logical way and deliver presentations to stakeholders.
- Identify and manage project risks, assumptions, issues and dependencies (RAID), maintaining appropriate logs, escalation routes, mitigation actions and reporting mechanisms throughout the project lifecycle.
- Maintain accurate and accessible project documentation including project plan, decision logs, lessons learned, governance records, budget tracking, RAIDs.
- Monitor project expenditure and budgets, validating invoices against agreed deliverables and escalating budget variances or financial risks where required.
- Coordinate dependencies and activity across all workstreams (including technical, business change, BAU, discovery, sprint deliveries, training, testing) to ensure alignment and delivery against the project plan.
- Work closely with the Associate Director of Business Change, ensuring end-users understand, adopt, and effectively use the new CRM through structured communication, training plans, and engagement activities.
- Manage stakeholder expectations proactively by providing timely insights, anticipating concerns, and ensuring transparency about constraints or required trade-offs.

- Liaise with the technical lead and vendor to ensure all aspects of the migration, including data mapping, system configuration, and integration with existing technologies, are implemented according to the project plan.
- Oversee the development of training materials, user guides, and support documentation.
- Oversee and coordinate all testing phases, including functional testing, user acceptance testing (UAT), system integration testing, and regression testing, ensuring defects are logged, prioritised, and resolved. Ensure that quality assurance standards, data validation rules, and acceptance criteria are clearly defined and adhered to.
- Lead on Post-Implementation Support & Continuous Improvement by overseeing the post-launch stabilisation and hyper-care period, ensuring that issues are logged, prioritised, and resolved promptly. Conduct post-implementation reviews, capturing lessons learned and ensuring continuous improvement is incorporated into future phases or enhancements. Establish mechanisms for ongoing CRM optimisation to ensure the system continues to meet evolving organisational needs.
- Support wider organisational projects as required, providing project coordination, governance and delivery.

COMPETENCIES REQUIRED FOR THE ROLE

Essential	Desirable
<ul style="list-style-type: none"> • Planning and Organising • Analysing • Formulating Strategies and Concepts • Writing and Reporting • Following Instructions and Procedures 	<ul style="list-style-type: none"> • Applying Expertise and Technology • Learning and Researching • Presenting and Communicating Information

QUALIFICATION(S), KNOWLEDGE, SKILLS AND EXPERIENCE REQUIRED FOR THE ROLE

Academic or Professional Qualifications (or equivalent):

Essential	Desirable
<ul style="list-style-type: none"> • Degree Level or equivalent experience • Project Management Professional (PMP) certification or equivalent. • Practical understanding and experience of key IT processes and practices • A background in Project Management with a keen understanding of the PM discipline and best practices available • Extensive experience in data management, analysis and presentation • Experience in stakeholder management and change management within an organisational context. 	<ul style="list-style-type: none"> • Experience of implementing CRM Project • Experience of agile methodologies • Experience with Microsoft Dynamics CRM platform. • Experience of major change programme

Other Requirements:

- Central London Based, with a minimum of three days a week in the office
- Willingness to work flexible hours, outside of traditional office hours.

Signature

I confirm this job profile has been drawn up with my full involvement and accurately reflects the responsibilities of the role.

Postholder's Signature:

NAME:

Line Manager's Signature:

NAME:

Date: