

# Customer Relationship Management Product Manager

Role Description and Recruitment Pack



# Contents

- Contents.....2
- Role overview.....3
  - Why this position is important to us.....3
  - The impact you will have in this role.....3
- Welcome to Stewardship .....4
  - Our vision and values.....4
- Job detail.....5
  - Overview.....5
  - Main responsibilities.....5
  - It’s all about you... .....6
- Desired skills and experience .....7
- Working for us .....8
- How to apply.....9

# Role overview

<b>Title:</b>	CRM Product Manager
<b>Hours:</b>	Full time, 35 hours per week, although we can be flexible for the right candidate.
<b>Contract:</b>	Permanent
<b>Location:</b>	1 Lamb's Passage, London, EC1Y 8AB There is some flexibility to work remotely, although you must be able to work in the office at least two days per month, or as the organisation requires.
<b>Reports to:</b>	Head of Enterprise Applications and Architecture
<b>Salary:</b>	£40,000 - £45,000 p.a. depending on skills and experience
<b>Closing Date:</b>	Monday 9am, 1 <sup>st</sup> July 2024 <i>Applications will be assessed when they are received, so early application is encouraged. We reserve the right to close this vacancy early if we receive sufficient applications for the role.</i>

## Why this position is important to us

This position will help us take the next big step up in how we engage with and serve our customers. Stewardship offers a broad range of services to the Christian community – accounts examination, a payroll bureau, charity formation, a consultancy helpline, lending, a giving platform, philanthropy services. We are looking to extend our use of Salesforce to integrate the customer information from these different services. On top of that integrated customer base, we want to build cutting edge customer experience management (CXM) and customer service capabilities.

## The impact you will have in this role

This role will work with the Head of Enterprise Applications and a project manager to implement the staged roll-out of Salesforce components. Although the roll-out will be done in bite-sized chunks, those small components will sum up to a major shift in the organisation's capabilities. You will also be optimising business processes, making Stewardship staff's jobs simpler and more efficient. Once the system is up and running, you will manage its ongoing evolution. The net result of all of this is that Stewardship will be a more efficient and effective organisation, better able to deliver the excellent customer service we are known for.

# Welcome to Stewardship

Big or small. First or last. Given or received. We make every gift count.

We're a place where connection happens - where those called to give meet those called to go. A community of generous stewards uniting to use all God has given us to love Him, love one another, and love our neighbours as ourselves.

We help Christians give and we strengthen the causes they give to.

We call this **Active Generosity**.

## Our vision and values

Our vision is for the world to encounter Jesus through the generosity of His church.

At our core, as believers in Jesus Christ, are the biblical values of:



**Generosity**  
expressed with  
**Joy**



**Relationship**  
strengthened with  
**Understanding**



**Integrity**  
demonstrated with  
**Justice**



**Service**  
delivered with  
**Excellence**

For over 100 years, we've helped Christians, charities and churches activate generosity, resource their calling and make a difference in Jesus' name.

In 1906, Stewardship was created by a small group of Christians uniting to release generous gifts and financial support to Christian ministries in the UK and overseas. Among their number were professionals and philanthropists, chemists and church planters, factory workers and evangelists, with each giving as they were able.

Today we help over 30,000 Christians experience the joy of being 'actively generous', supporting over 4,000 churches, 2,300 Christian workers and 6,000 charities.

Our methods have changed, but our mission remains the same.

# Job detail

## Overview

Stewardship serves Christian givers, churches, and charities through numerous financial services. We have always delivered excellent customer service and have won industry awards in many of our lines of business. To keep our standards of excellence in an increasingly digital world we are building out our Salesforce instance. With it, and the tools available in its ecosystem, we will continue to deliver award winning service and an excellent customer experience.

The purpose of the role is to manage the ongoing growth and use of our Salesforce instance. Initially this will require working with others to roll out new Salesforce components. Then the role will take on the refinement and prioritisation of the ongoing evolution of the system. There will always be the need for the optimisation of business processes, helping users to adopt the new tools, and managing data integrity.

You will work with stakeholders and cross-functional teams acting as a bridge between the technical and service teams to ensure the technology solutions are practical and meet the needs of the business. You will also be required to develop ongoing training, implementation, and communication plans to drive consistent and effective use and understanding of the CRM across the organisation.

## Main responsibilities

1. Business and Process Change Implementation:
  - Lead and provide input on business and process change related to the CRM system.
  - Work with business units and IT teams to ensure practical technology solutions.
2. CRM Development and Maintenance:
  - Understand internal cross-functional customer needs through data analysis and stakeholder engagement.
  - Refine and prioritise the CRM product backlog.
  - Manage and communicate the CRM development roadmap.
  - Collaborate with development teams to enhance the CRM system.
  - Be responsible for recording, prioritising, and solving any CRM issues either directly, through IT colleagues, or external agencies.
3. CRM Adoption and Training:
  - Train employees through online or face-to-face sessions and create online resources.
  - Drive consistent and effective use of the CRM across teams.
  - Regularly analyse usage and work proactively with teams to increase adoption.
  - Ensure all training support documentation remains current and relevant.
4. Data Quality:
  - Adhere to data and quality standards across the organization.
  - Review and maintain data integrity within the system.

## It's all about you...

We recognise that to be great at your role, there are certain characteristics that are important and others that enable a good fit within our existing team and culture.

*We know this is a broad role and, whilst you might not meet all the specified criteria below, if you have a good level of fit and feel called to apply, we encourage you to do so. Alternatively, please get in touch for an informal conversation. Formal learning and development plans will be in place for this role.*

- You have strong problem-solving skills, are naturally analytical and can think clearly and logically.
- You have a natural sense for process and efficiency, seeking to optimise processes wherever possible.
- You champion change and better ways of working throughout all levels of an organisation in an enthusiastic manner.
- You do not necessarily have training or experience in software development, but you are able to understand how software systems function through clear, logical thinking.
- You are self-directed and exhibit initiative. You are motivated to find out what needs doing and have the drive and tenacity to work it through to completion.
- You are comfortable being both self-sufficient, taking your own initiative, and being a team player who enjoys working effectively as part of a hybrid team.
- You can take people on a journey of change, by building a rapport with them, showing you understand their interests, and then explaining how the change you are driving will benefit them.
- You have strong verbal and written communication skills and can communicate clearly and effectively, flexing your style for your audience.
- You are proficient in managing multiple requirements, with the ability to prioritise against organisational strategy and objectives.
- You have experience of leading at least one multi-department change management programme.
- You have experience at least one major software implementation fulfilling the role of business analyst, trainer, or project manager.
- You have at least two years' experience working as a product manager, business analyst, or project manager.
- You are Salesforce certified.
- You have formal qualification in business analysis or project management.
- You are a practising Christian, able to demonstrate a personal commitment to the mission, principles, values, and practices contained in our Ethos Statement. You should also be able to demonstrate enthusiasm for the Christian purposes of the organisation and a readiness to support and contribute to its ethos.

# Desired skills and experience

Skills and experience	Essential	Desirable
You will meet our Occupational Requirement to be a practicing Christian as an active member of a local church and be able to clearly demonstrate a personal commitment to the mission, principles, values, and practices contained in our Ethos Statement.	✓	
You have the Right to Work in the UK (we do not offer sponsorship arrangements).	✓	
You can show experience of process mapping and process optimisation.	✓	
You think systematically and logically and are comfortable analysing complex scenarios.	✓	
You have experience (not necessarily technical) of the design, configuration, or management of software systems.	✓	
You can evidence capability of attention to detail or have experience in roles where attention to detail is demanded.	✓	
You have experience and capability collaborating with stakeholders – understanding their needs, winning their trust, and communicating with them.	✓	
You have certifications or experience working with Salesforce		✓
You have a business analysis or project management certification.		✓
You have project management skills, ideally with experience in delivery of data or software projects.		✓
You have experience of leading stakeholders through change.		✓
You have experience in training or skills transfer.		✓
You have certification or experience with agile methodologies.		✓

# Working for us

## Q. What are the usual working hours?

A. Stewardship's normal office hours are 9am to 5pm, Monday to Friday, but you may be required to work flexibly between 8am and 6pm in accordance with the needs of the organisation.

## Q. How much Annual Leave do you offer?

A. All full-time employees receive 27 days Annual Leave, and 8 days bank holiday leave.

## Q. What are the pension arrangements?

A. Stewardship offers a generous pension contribution; the equivalent of 10% of your gross annual salary into a group personal pension scheme (applicable after 3 months service).

A salary sacrifice scheme for personal contributions is also available.

## Q. Is it possible to work from home?

A. Yes, we are happy to offer flexibility for this role but would expect you to be able to work in our London office for a minimum of 2 days each month, or as required by the organisation.

## Q. What staff benefits do you offer?

A. Once probation has been passed, there are number of benefits available to staff:

- Subsidised exercise membership
- Hybrid and flexible working options
- Contribution to your charitable giving account
- Generous leave allowances
- Long service awards
- Participation in the Cycle to Work Scheme
- Death in Service benefit (4x annual salary)
- Option to join a Health Cash Plan
- Interest-free season ticket loan





# How to apply



## Occupational Requirement (OR)

As a result of our Christian ethos, this post is covered by an Occupational Requirement (OR) under Part 1 of Schedule 9 to the Equality Act 2010. The successful applicant will be expected to be a practising Christian and to clearly demonstrate a personal commitment to the mission, principles, values and practices contained in our Ethos Statement, by:

- Active membership of local church congregation.
- An understanding of the faith aspects of the work of Christian charities, including the preparedness to pray with colleagues, where appropriate.



## Contact us

For any questions or to arrange an informal conversation about this role, please contact Joan Gray, our People, Culture & Place Administrator, on:

Telephone: 020 8502 5600 extension 307

Email: [careers@stewardship.org.uk](mailto:careers@stewardship.org.uk)



## How to apply for this position

You can apply online for this role at [www.stewardship.org.uk/about-us/careers](http://www.stewardship.org.uk/about-us/careers)

Please remember to also upload a copy of your C.V. along with a covering letter that demonstrates what you would bring to this role, to Stewardship and how you fulfil the Occupational Requirement.