

Name:**Department Commercial: (Across business delivery responsibility)****Grade: G3****Job Title: CRM Systems Administrator****Immediate Line Manager (Job Title): TBC (Commercial Director)****Job Purpose**

To ensure that the CRM system is configured optimally to support business activities and processes across the company, now and in the future, in order to:

- Improve efficiency, reduce administration time and enhance robustness in data entry, data manipulation, report generation, and the generation of other information management processes.
- Facilitate integration with other teams that are responsible for other systems that handle information across the business.
- Improve customer experience in terms of service provision, convenience and quality of information interface and output
- Encourage consistency of systems and process, as far as is appropriate, across the business.

Main Duties (including % of time spent)

To act as a central coordination point for super-user's requests and in configuring the CRM system to meet the user needs. (45%)

If necessary, (i.e. where reprogramming may be needed), interact with software developers in IT, to implement changes and enable future enhancements or customisation. (10%)

To act as a central source of technical expertise in CRM functionality, operation and configuration to support super users and provide updates/training where and when needed. (20%)

Where necessary to influence stakeholders if conflicting or incompatible demands are made. This will involve liaising with senior users to resolve issues and where appropriate standardise systems/processes. (10%)

To facilitate operational reviews, with senior users, on future functionalities to enhance the benefits of CRM implementation. (10%)

To interact with staff who have responsibility for other management software systems to ensure seamless integration between various packages, (e.g. Laboratory, Finance) (5%)

Knowledge, Skills & Experience

A thorough and deep working knowledge of Microsoft Dynamics software

Familiarity with good business practices across a range services.

Familiarity with business process flows from initial enquiry through to reporting and close off.

Experience in utilisation and/or configuration of complex software systems and familiarity with software engineering

KEY TASKS & RESPONSIBILITIES**1. Communications**

Communicate directly and effectively with staff at all levels and translate complex principles into simple messages

Interpret technical detail and convert this into specific actions

Interact with people with differing views and where necessary mediate

Help/persuade staff to see and accept alternative ideas and points of view

Produce clear written documentation and SOPs

Produce clear written justifications for change implementation

2. Analytical Skills & Creativity

Analyse complex information/needs and devise effective solutions and where necessary develop alternative approaches to problems or issues

Analyse situations and gap analyses in order to determine most effective approaches in relation to software configuration and where necessary define needs for customisation

Propose and develop processes that meet diverse needs across users whilst complying with company and externally defined policies and standards

3. Management of Activities

Effectively manage time in relation to own responsibilities and in realistic configuration project development and planning

Deliver project outputs in accordance with plans (time and budget) whilst utilising resource not directly under their own control.

Ensure all relevant stakeholders are actively engaged throughout the configuration process

4. Management of People **No Direct Reports**

No direct management but able to influence people across the organisation. This includes elements of change management

5. Management of Finance and resources

No direct responsibility but has a role to play in ensuring resources including contractors and consultants are utilised with greatest efficiency

Able to identify and to recommend efficiencies in business processes that may have a financial impact

6. Autonomy & Accountability

Provide professional guidance to less experienced colleagues on technical matters relating to CRM and its use.

Implement configuration changes within CRM where they do not directly require or impinge on process changes.

Recommend changes in processes or systems in operating departments to the relevant HoD in order to optimise CRM implementation and improve efficiency

Provide proposals/recommendations to the Director in relation to changes in higher level procedures impacting across more than one department

7. Working Environment

Requirement to travel between sites as necessary depending on specific project implementation needs

8. Other designated job roles

None envisaged

DSE User**Signed & Dated**

Job Holder Date

Line Manager Date