

CRM Manager



The Hospice of St Francis is passionate about helping patients and their families to live their precious lives well until the very end, giving patients choice over their care and the opportunity to receive our outstanding care whether that is in the Hospice In-Patient Unit or in their own homes.

The Hospice has a trusted reputation over 40 years of stewardship and trust right across the communities it supports to raise over £6 million each year.

The CRM Manager will play a key role as we transition to a new CRM system and increase our use of data whilst providing excellent supporter experience. You will be responsible for maintaining and optimising the CRM system, overseeing donation processing, training, reporting and data integrity.

Permanent: 37.5 hours per week. Salary band: 6

Direct Reports: Donor Care Team

Main duties and responsibilities:

- Develop and maintain a solid understanding of Donorfy, our new CRM, and build product knowledge to become our in-house CRM specialist engaging with various departments to identify gaps, opportunities and implementing solutions.
- Manage the daily functionality of the CRM as the expert, troubleshooting issues and liaising with external suppliers to ensure a high-quality service for users.
- Develop a CRM strategy that aligns with the strategic objectives of the whole organisation.
- Develop CRM data processes which ensure a high standard of data cleanliness and quality, and complies with GDPR.
- Develop and maintain excellent working relationships with all stakeholders, specifically fundraising, finance and communications.

Key Accountabilities, Responsibilities & Tasks

Departmental & Role Specifics	<ul style="list-style-type: none"> • Lead on the strategic configuration, maintenance and development of the CRM to ensure that it continually evolves to meet the changing business needs of the Hospice. • Support the IT Specialist to manage users, privileges and license allocations ensuring business requirements are met and licenses are efficiently utilised. • Manage relationships with internal and external IT teams, software suppliers, specialist contractors in relation to the CRM to ensure the smooth functioning of the system and to oversee changes, upgrades and developments of the system. • Lead on the planning and delivery of training for all fundraising staff and other stakeholders in the use of the CRM. • Develop and maintain CRM documentation that logs and tracks key metrics and information. • Manage the automation of processes, data selection and segmentation, imports and exports. • Manage the integration with other systems to maximise efficiency and accuracy.
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	<ul style="list-style-type: none"> • Lead on planning and developing processes to ensure operational efficiency of the team. • Lead on data accuracy and CRM processes to support the finance team's reconciliation of income between the finance system and CRM. • Support the communications and fundraising teams on the increase and retention of supporters. • Support colleagues through the provision of KPI reports and other data as required. • Develop a CRM strategy to ensure it keeps pace with evolving income generation requirements. • Provide guidance on the use of data in relation to GDPR regulation to ensure that the Hospice is compliant with existing and new legislation.
Qualifications, Skills, Experience, Knowledge & Approach	<ul style="list-style-type: none"> • A minimum of two years relevant experience working with CRMs in a fundraising, sales or a direct marketing environment. • Demonstrable experience of developing CRM solutions to meet organisational data needs. • Line management experience. • Experience using advanced Excel functions to analyse and interpret large datasets is desirable. • Knowledge of Donorfy is desirable but training will be given. • Experience of working with platforms such as Stripe, Mailchimp, Access Direct Debit, Much Loved, Enthused, is desirable. • Experience of working with external support desks to seek advice and resolution to processing problems and issues. • Knowledge of GDPR legislation as it applies to the use of fundraising data. • Confident, self-starter with the capability and aptitude to learn systems and processes quickly and work autonomously. • Have an eye for detail and be meticulous in ensuring accuracy of data. • An understanding of fundraising stewardship or customer care principles gained in either a voluntary sector or private sector environment would be an advantage.
Key Accountabilities, Responsibilities & Tasks	
Communication	<ul style="list-style-type: none"> • You can work closely, in a collaborative environment, with fundraising and communications colleagues and the wider Hospice to achieve our objectives. • You can communicate effectively and respectfully with colleagues at all times.
Internal & External Contacts	<ul style="list-style-type: none"> • You are able to work effectively with external providers including IT support desks to seek solutions to issues and fill knowledge gaps. • You are able to forge productive working relationships with internal colleagues, in particular the fundraising, finance and communications.
Decision Making	<ul style="list-style-type: none"> • A pro-active approach to work and problem solving, to spot and deal with issues as they occur • Able to work under own initiative, under pressure within structured timescales. • Freedom to act within delegated responsibility and charity policy and procedure • Able to consolidate learning with speed and efficiency. • Competent to understand the limits of own knowledge and source appropriate advice. • Take soundings, advice and feedback from a range of people internally and external. • Keep abreast of best practice communicate and apply that learning for the benefit of the Charity • Understand and assess reputational risk, and seek appropriate advice. • The post holder is required to apply the level of judgement commensurate with role, act at all times in the best interests of the Hospice in accordance with the Nolan Principles of Public Life.
Mental and Physical Consideration. Working Conditions & Environment	<ul style="list-style-type: none"> • You will be required to sit at a computer and work from screens.
Health & Safety	<ul style="list-style-type: none"> • Be responsible for compliance with own professional body requirements in terms of code of conduct, professional practice, expertise and knowledge including maintaining continuous professional development. • Understand and comply with all Health and Safety, Fire and Infection Control regulations • Complete all mandatory training

This list of tasks and responsibilities is not exhaustive, other relevant and appropriate duties as required by the Manager may be required. This Job Description will be reviewed and can be amended by agreement with the Post Holder and Manager.

	<ul style="list-style-type: none">• Report any accidents or incidents in the department
Safeguarding	<ul style="list-style-type: none">• Act in a manner at all times to safeguard the interests of others and justify public trust and confidence in the Hospice of St Francis

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