



CRM Manager

Department:	Marketing
Reports to:	Performance Lead (Marketing Lead in the interim)
Job Family:	Shared Services
Career Family / Job Capsule:	Manager
Key dimensions:	(£Budget, Team headcount FTE, any other relevant P&L metrics as they become available)
Direct Reports	
Committee/Board membership(s)	n/a
Approved Senior Manager Function(s), Prescribed or Other Overall Responsibilities and/or any Certification Function(s)	Please tick one of the following (this is mandatory)*: - Standard role <input checked="" type="checkbox"/>

Purpose of the role:

We've recently implemented the Microsoft Dynamics CRM system so now need an experienced CRM manager to join the marketing team to start developing campaigns that improve customer LTV through upsell, cross sell and retention campaigns.



This is a hands on role where you'll be in the platform creating audience selections, developing automation and next action rules, building the emails, implementing tracking requirements and setting up bespoke and regular reporting as required. You'll be supported by the wider marketing team who will assist with content / email designs and our digital team who will be able to develop bespoke campaign landing pages and tracking.

You will also support broader acquisition activity, working with the performance lead and sales team to develop nurture journeys that contribute to increased conversion rates on 1st and 3rd party prospect data.

You'll be the responsible for the evolution of the CRM system to maximise its effectiveness for the business, working with teams from across the organisation to ensure data integrity, availability of data points, oversee system upgrades, development and expansion of features. You'll work across the business to help trouble shoot any system issues and implement solutions.

As the primary user of the system you'll need to ensure we have robust processes and structures in place to ensure the smooth running of the system, managing user access and ensuring all regulatory requirements are adhered to.

Key Responsibilities:

Data Management:

- Assisting with the collection, organization, and maintenance of customer and prospect data in the CRM system.
- Ensuring data accuracy and integrity by identifying and rectifying any discrepancies or issues in the CRM database.
- Identifying the data points we need to create more impactful campaigns and share meaningful MI back to the business to aid decision making.

Campaign Development and Execution:

- Helping to execute marketing campaigns across different channels (email, social media, SMS, phone etc.) using the CRM tools.
- Monitoring campaign performance, reporting results and recommending opportunities for improvement
- Assisting in the segmentation of customer data to target the right audience with the right campaign aligned to the best fit journey.

Customer Segmentation & Personalization:

- Assisting in segmenting customers based on various criteria like behaviour, purchase history, or demographics.
- Helping create personalized customer experiences based on CRM insights and data points.



Reporting & Analytics:

- Generating CRM reports to track customer interactions, sales and commercial benefits.
- Providing insights and recommendations for improving customer engagement based on CRM data.

CRM System Maintenance:

- Overseeing system updates, troubleshooting, and ensuring that the CRM system is functioning smoothly.

Collaboration:

- Working closely with marketing, sales, and customer service teams to ensure alignment in CRM strategies and goals.
- Assisting with customer retention and loyalty programs.
- Supporting the broader business deliver regulatory and membership communications

Skills / Experience / Knowledge:

Technical Skills:

- Experienced using CRM platforms (e.g., Microsoft Dynamics, Salesforce, HubSpot).
- Technical understanding of CRM systems and integrations into other systems
- Good understanding of data management and customer segmentation.
- Strong proficiency in Excel or other data management tools.

Communication Skills:

- Good verbal and written communication skills to collaborate with team members and stakeholders.
- Ability to assist in creating plans for customer-facing content
- Able to support in creating engaging, persuasive and action focused communication

Analytical Skills:

- Ability to analyse data, identify trends, and provide recommendations based on insights.
- Attention to detail for accurate data entry, proof reading and reporting.
- An interest in the broader business mechanics to help understand the impact of your role and activity

Organisational Skills:

- Ability to manage multiple tasks and projects efficiently.



- Time management skills to meet deadlines across various initiatives.

Commercial focus

- Experience of working in a commercial environment working to targets
- Proactive in identifying opportunities to drive growth for the business

Values	<p>Define who we are as OneFamily. They come from the beliefs we hold, the way we behave and how we want to work together for our customers. For OneFamily this means:</p> <ul style="list-style-type: none"> • Principled • Courageous • Effective <p>Our values are unique to our brand. They give us purpose and focus. They are vital in helping us all 'do the right thing'. If we are confident that we are true to our values, then we can be sure that we are doing the best for our customers.</p>
Adaptability	<p>This job description is intended to provide a broad outline of the main responsibilities only. The post holder is required to be flexible in developing their role in agreement with their Line Manager. In addition, they may be required to carry out any other duties deemed appropriate within the role and expertise.</p>
Performance Management	<p>All employees have a responsibility to participate in regular one to ones with their manager and to identify performance standards of the post. As part of the performance management process every employee is responsible for participating in identifying their own training and development needs to meet the requirements of their role.</p>
Health and Safety	<p>Employees must be aware of the responsibilities placed on them under Health and Safety at Work Act 1974 and take reasonable care for the health and safety of themselves and of other people who may be affected by their acts or omissions at work.</p>
Equality and Diversity	<p>The Society is committed to building an environment where the diversity of its employees is valued, respected and seen as an asset to enabling delivery of the best possible service to our customers and colleagues. It is unlawful to discriminate directly or indirectly in recruitment or employment because of any of the nine 'protected characteristics' contained in the Equality Act 2010. These are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation. Failure to comply with organisational policies on equality and diversity may result in disciplinary action.</p>



Confidentiality	The unauthorised use or disclosure of customer or other personal information is regarded as gross misconduct and will be subject to disciplinary procedures, and could result in a prosecution for an offence or action for civil damages under the General Data Protection Regulations. (GDPR).
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Regulatory	
	<ul style="list-style-type: none"> To comply, at all times, with all regulatory, statutory and legislative requirements so far as they relate to the role To abide by the Rules of the Society at all times To understand and comply with all Group Governance Policies, as appropriate to the role To deliver all apportioned accountabilities and responsibilities

Individual Conduct Rules	
Rule 1	You must act with integrity
Rule 2	You must act with due skill, care and diligence.
Rule 3	You must be open and cooperative with the FCA, the PRA and other regulators.
Rule 4	You must pay due regard to the interests of customers and treat them fairly.
Rule 5	You must observe proper standards of market conduct.
Rule 6	You must act to deliver good outcomes for retail customers.
Senior Conduct Rules: Applicable to Senior Management Function(s) roles only	
SC1	You must take reasonable steps to ensure that the business of the firm for which you are responsible is controlled effectively
SC2	You must take reasonable steps to ensure that the business of the <i>firm</i> for which you are responsible complies with the relevant requirements and standards of the regulatory system.
SC3	You must take reasonable steps to ensure that any delegation of your responsibilities is to an appropriate person and that you oversee the discharge of the delegated responsibility effectively.
SC4	You must disclose appropriately any information of which the <i>FCA</i> or <i>PRA</i> would reasonably expect notice.



Declaration	
I confirm I have read and understood the content of this Job Description and I accept the content as an accurate description of the role I am required to perform.	
Job holders full name:	
Job holders signature:	
Date:	

Version Control:

Amendment Summary	Date	Reviewer
Updated to be aligned with the requirements under SMCR.	24 October 2019	Lawrence Quirk
Updated to accommodate solo regulated SMCR requirements	16 December 2019	Julie Cogger
Updated to include new Rule 6 Conduct Rule.	9 Feb 2023	Lawrence Quirk
Updated to amalgamate the standard, CF & SMF job description template and new values	3 April 2024	Heather Duckett