Job Description

Post/Job Title:	**CRM and Marketing Automation Manager**
Ref:	**126**
Location:	**Studland House, Lansdowne Campus**
Professional Service:	**Marketing & Communications (M&C)**
Normal hours per week:	**1.0 FTE**
Grade:	**6**
Accountable to:	**Digital Communications Manager**
Special conditions:	**Flexible approach and additional hours occasionally required**

Job Purpose

The CRM and Marketing Automation Manager plays a pivotal role in ensuring the university gains maximum benefit from using the CRM and various marketing technology platforms, specifically supporting student recruitment, conversion and enquiry management activities. The postholder will provide specialist guidance, business intelligence, and insights to teams to help deliver innovative, effective, and targeted marketing campaigns that meet agreed strategic student recruitment objectives.

As part of the Marketing and Communications department, the role works closely with a variety of stakeholders to develop and guide on best practices for building our CRM and marketing platforms to engage effectively with prospective students whilst driving efficiency within the department.

The postholder will be the 'Principal Manager' of the CRM (Microsoft Dynamics) and associated marketing platforms (Gecko, Unibuddy, Live Assistant for Dynamics and Dotdigital), ensuring they are integrated and the functionality is being utilised for maximum impact on our recruitment, conversion and enquiry management. This role is responsible for continuous improvement, managing a development roadmap that meets emerging business needs, and taking appropriate advantage of innovation in systems, features and functionality. The post also acts as the main point of contact with the university's IT Services department and the external service provider.

As part of this role, you will be responsible for managing customer data across our systems. This includes collecting, organising, and maintaining data such as contact information, course interests, events attended, and interactions/touch points.

The postholder will support the production of dashboards that provide timely and accurate business intelligence information, as well as high-level data analysis and evaluation of CRM data, to aid marketing and recruitment campaigns and ensure key audiences are targeted for the best return on investment.

Main Responsibilities

1. Lead on the advancement, management and configuration of the university's CRM and marketing automation systems. Work in close partnership with IT Services, external suppliers and third-party providers, as required, to improve operational efficiency and promote the use of the most effective technology.

2. Act as the department's expert in CRM and marketing automation platforms, providing specialist advice and support to colleagues across the department. Provide training and encourage best practice to meet both the department and university's strategic objectives and targets, delivering an excellent enquirer and applicant experience.

3. Work with the Digital, Marketing, Conversion and Future Student Enquiry Teams to develop and evaluate evidence-based CRM and Conversion plans. This includes determining customer preferences, measuring customer satisfaction, and the use of engagement modelling to maximise and continually improve the effectiveness of strategies, campaigns and allocation of resources.

4. Identify and document CRM fixes, modifications, and new features, including the use of workflows, in collaboration with IT Services. Supporting the design, build and testing of new features and functionality. Review interfaces, raise change requests and test changes. Build reporting functions that enable evidence-based decision making.

5. Own and manage CRM and marketing automation processes with responsibility for maintaining and developing documentation. Examples include building dashboards, creating workflows and advanced find reports and marketing lists for automated email campaigns. Ensure all relevant teams use the system for lead generation, conversion and recruitment activities.

6. Produce and present high-level CRM reports which identify trends, key factors and interpret findings to produce recommendations for improving enquiry and applicant journeys. Work closely with the faculty marketing teams, recruitment and admissions teams to maximise the positive impact the data within the CRM system can deliver to their work.

7. Stay up to date with developments within the HE sector, CRM, marketing automation and segmentation, information security and governance, best practice and technologies such as Artificial Intelligence.

8. Act as the lead in relation to the governance and the operational management of the CRM and marketing automation systems under the direction of the Digital Communications Manager ensuring the integrity of the data held in the CRM system.

9. Lead on department GDPR compliance and accuracy of data management ensuring that the CRM system is used correctly and all data, held or processed in related systems, is used and managed according to GDPR and university information security regulations.

10. Any other duties as required by the Digital Communications Manager.

Organisation Chart

This post reports to the Digital Communications Manager within Marketing & Communications (M&C). M&C is an overarching professional service embracing the University's profile-raising activities, marketing and student recruitment activities.

Contacts

Internal
Staff at all levels within M&C, faculties and other professional services

External
Third party suppliers, prospective students and current students.

Challenges

- Working to tight deadlines
- Organising and prioritising a large workload whilst maintaining attention to detail
- Utilising our CRM (Microsoft Dynamics) and marketing automation systems (Gecko, Unibuddy, Live Assistant for Dynamics, and Dotdigital)
- Collaborative working with a diverse range of stakeholders

Information Governance Responsibilities

Data User
    i.   Comply with the associated data protection, information security, information management and information technology regulations, policies, processes and procedures.

Safeguarding and Regulated Activity

If the role involves engaging in regulated activity relevant to vulnerable groups including children and disabled adults, it is an offence to apply for and perform the role, if a person is bared from engaging in regulated activity. Further information is available in BU's Safeguarding Policy and Suitability Statement on the Recruitment and Employment of Ex-offenders.

Additional Information

NB:
The purpose of the job description is to indicate the general level of responsibility and location of the position. The duties may vary from time to time without changing their general character or level of responsibility.

BU is an equal opportunities employer which values a diverse workforce. The post holder must at all times carry out their responsibilities with due regard to the University's Dignity, Diversity and Equality Policy Statement.

Our highly skilled and creative workforce is comprised of individuals drawn from a broad cross section of the globe, and who reflect a variety of backgrounds, talents, perspectives and experiences to build our global learning community. Through fused activity, the post holder must have an understanding of and commitment to promoting a global outlook.

All employees have an obligation to be aware of the University's Sustainability Policy, Climate and Ecological Crisis Action Plan, Travel Plan and associated documents, and to ensure that they carry out their day-to-day activities in an environmentally responsible manner and inspire students to do the same.

August 2024

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SELECTION CRITERIA	**E**ssential / **D**esirable
Knowledge (including experience & qualifications)	
Educated to degree level or significant equivalent relevant experience	E
Demonstrable professional experience working in a related role	E
Experience managing and developing a CRM and marketing automation systems and working with a range of stakeholders to develop the system	E
Experience of working across a range of marketing automation platforms	E
Knowledge and understanding of evaluation techniques, including experience of conducting process and impact evaluations	E
Experience of business intelligence practices with the ability to interpret analytic data into strategic information	E
Proven experience of manipulating and analysing large volumes of data	D
Experience of writing and presenting high level insights and preparing reports	E
In-depth understanding of data management and governance including GDPR and information security best practice	E
Experience of using web analytics tools to monitor campaigns and conversion to goals	D
Experience of sound business intelligence practices, including analytic and interpretive rigour to interpret data into strategic information	D
Understanding of the requirements for delivery of effective marketing communications online and in print	E
Familiarity with the HE environment	D
Experience of working with and using Microsoft Dynamics CRM	E
Skills	
Excellent organisational skills involving application of project management principles on multi-stakeholder projects	E
Ability to develop impact evaluation methods and techniques which can be effectively implemented by colleagues/stakeholders	E
Ability to persuade and influence complex stakeholder groups	E
Proven ability as an operational task leader, assessing appropriate resources and support requirements so objectives are met.	E
Proven high-level analytical skills including data analysis and interpretation	E
Excellent interpersonal skills, able to communicate clearly and concisely with a wide range of people at different seniorities	E
Ability to work effectively as part of a team and contribute to building and strengthening working relationships, sharing information and ideas to help others develop their practice/area of work.	E
High-level of computing skills, including CRM management and development	E
Good time management skills and the ability to prioritise a multi-task workload and achieve deadlines	E
Attributes	
Customer focused	E
Motivated self-starter with a can-do attitude and able to work on own initiative	E
Good team player able to work collaboratively with colleagues	E
Creativity and enthusiasm	E
Attention to detail	E
Committed to delivering Service Excellence	E