



Royal College of Anaesthetists

Dynamics CRM and Analytics Manager

Directorate: Communications and External Affairs

Reports to: Head of Membership

No. of Direct Reports: 0

Grade: 4

1.1 Job purpose

The Dynamics CRM and Analytics Manager will develop and manage the College's new Dynamics CRM system to ensure that the College utilises it fully; maximising engagement with users and highlighting opportunities dependent on the business needs of the various users. This role will play a critical part in growing the organisation through the delivery of a high profile and high value Dynamics CRM project.

Working with our Dynamics CRM suppliers and colleagues across the College, this role will be responsible for ensuring that the ongoing development of the Dynamics CRM addresses and meets the needs of the teams/users in the College, maintains a strong user experience and respects the frameworks and guidelines that underpin the College strategy. This role will also be responsible for refreshing how the College carries out analytical reporting.

The Dynamics CRM and Analytics Manager will work with other Managers and Heads of Department to ensure accuracy and integrity of data held within the Dynamics CRM, as well as creating analytical interfaces allowing the value of the data from across the College to be maximised. Data management and governance will also be a key part of this role and it will be the responsibility of the role holder to maintain data on the Dynamics CRM in accordance with GDPR and the College's policies.

The new system and increased emphasis on analytics, is not just a technology change for the College but also a cultural one and this role will be pivotal in communicating and embedding this across the College.

1.2 Key tasks and responsibilities

Dynamics CRM

- Own the delivery of the newly configured CRM into live use by all staff
- Work with stakeholders post go live and ongoing, to identify system developments and implement them
- Develop workflows to improve efficiencies of processes for teams within the CRM
- Develop strategic dashboards and KPI reporting tools (see Analytics section below)
- Develop dashboards to assist teams preferred ways of working, for both individuals and a full team
- Develop, manage and maintain APIs with other systems; ensuring data accuracy and integrity
- Manage user security settings and access to sensitive and/or financial data
- Support the Membership and Finance teams during the membership renewal cycles
- Respond to ad hoc support requests, liaising with users and the system supplier, as required

- Manage the safe adoption of Microsoft Dynamics Online updates and version changes
- Provide training to current and new colleagues
- Cooperate with the College's external auditors, as required

Member Portal

- Work with the Dynamics CRM suppliers, Head of Membership and Digital Manager; who is leading on the member portal work, to develop this new functionality
- Assist the Head of Membership and Head of Communications on communicating the different aspects of the functionality to the whole membership base
- Manage the data flow between the CRM and Member Portal
- Develop the potential of this functionality to create a personalised and engaging interface for our members, together with the Digital Manager

Data Management and Compliance with GDPR

- Ensure College data is processed and held on the CRM in line with GDPR and the RCoA's Information Governance and security requirements
- Be the College's main point of contact for day-to-day data protection issues, including providing advice on GDPR and contacting the Information Commissioners Office for more detailed advice, as and when required
- Provide support to the College's Data Protection Officer and Head of Membership to ensure ongoing compliance with GDPR; this will include maintenance and review of the RCoA's Information Governance policy and plans and support for departmental audits and spot checks
- Manage Subject Access Requests
- Update and maintain the RCoA's Data Incident log, notifying the Data Protection Officer of any significant breaches
- Provide quarterly report to Audit Committee on data incidents
- Support the Data Protection Officer in meeting the requirements of NHSD's Data Security and Protection Toolkit
- Provide ongoing training to College staff on data protection
- Champion a cross-College and proactive approach to collecting, storing, archiving and using College data

Analytics

- Develop and automate KPI reports for management and senior members of staff
- Work with PowerBI users to develop team and individual dashboards
- Ensure data integrity and accuracy around reporting
- Identify, analyse and interpret patterns in data sets
- Coordinate data gathering and analysis with teams/colleagues across the College
- Identify the gaps in our data gathering and identify solutions to overcome these gaps
- Liaise with senior management to identify the analytic requirements to support strategic decision making

1.3 Qualifications, skills, knowledge and experience

- Experience of configuring and maintaining a Microsoft Dynamics CRM Online instance, including:
 - Campaigns set up and management
 - Tables and forms configuration
 - Lists and dashboards
 - Data quality management i.e. deduplication and merging
 - Workflows and bulk processing
 - Bulk data import and export
 - Core admin settings and values
 - Multiple instance management

- Updates application
- Experience of using BI tools such as PowerBI or Tableau
- Stakeholder management
- Data/record management experience
- Firm understanding of how to manage data and interrogate data for key insights
- Demonstrable knowledge and experience of compliance with the GDPR
- Excellent understanding of user experience, experience mapping and designing customer user journeys
- Excellent understanding of the principles of information architecture
- Confidence to provide technical coaching and training
- Demonstrable stakeholder / project management skills and a good understanding of Agile product management methodologies
- Experience of supplier agency management
- Experience as a Dynamics CRM product owner (desirable)
- Ability to tailor communication style to suit varied audiences
- Ability to work collaboratively across teams
- Ability to give meticulous attention to detail, whilst working quickly and accurately under pressure
- Positive 'can-do' attitude with a willingness to participate, problem solve and learn
- Comfortable working in an environment of change, growth and new ways of thinking/working
- Well organised and able to prioritise their work

1.4 Core Competencies

These competencies will help you understand and deliver the high performance required for this role at the College. These performance standards and behaviours will be assessed during the interview process and developed through the appraisal process.

VALUE:	EXPERT
COMPETENCY:	Empathy with the College and its business
DESCRIPTION:	Understands the fundamentals of what the College does, its mission, vision, values and culture. Uses this information to grow and develop the College and its people

Support & Delivery
<ul style="list-style-type: none"> • Applies knowledge of business to day-to-day activities • Understands team function and how it fits in overall College • Develops a team spirit • Applies a "can do" approach • Understands impact of own role on wider College functions (and vice versa)
Management
<ul style="list-style-type: none"> • Applies their professional expertise to the College • Thinks commercially • Acts as a College ambassador • Delegates fully and effectively • Develops, motivates and engages teams and individuals • Plans resources effectively • Leads by example
Strategic Leadership
<ul style="list-style-type: none"> • Champions key direction and strategy • Encourages and demonstrates entrepreneurialism and cross-College working • Encourages a high-performance culture • Understands impact of external changes on the College

VALUE:	INCLUSIVE
COMPETENCY:	Collaboration and Communication
DESCRIPTION:	Works collaboratively and co-operatively with colleagues to get the job done and responds positively to change. Communicates widely and effectively. Appreciates diversity and equal opportunities for all.

Support & Delivery
<ul style="list-style-type: none"> • Is a team player, open to others' views • Adapts communication style to situation • Keeps others informed and updated • Willing to give and receive feedback • Listens and responds effectively • Values different perspectives
Management
<ul style="list-style-type: none"> • Communicates effectively and openly, ensuring key messages are cascaded and everyone's views are heard • Works with peers to influence effectively and consistently • Deals with conflict between individuals and teams • Works with partners to enhance the reputation of the College • Ensures transparency and credibility • Networks appropriately • Ensures and enables an inclusive culture
Strategic Leadership
<ul style="list-style-type: none"> • Articulates a shared vision • Presents in an engaging manner • Ensures conflict and risk is mitigated • Champions diversity and values

VALUE:	POSITIVE
COMPETENCY:	Customer Focus
DESCRIPTION:	Builds relationships with customers by understanding, anticipating and responding to their needs. Takes responsibility to complete work in order to exceed expectations.

Support & Delivery
<ul style="list-style-type: none"> • Answers phones in a timely way • Understands customer needs, stresses and pressures • Understands impact of own actions • Manages own time • Meets and exceeds targets • Does what they say they'll do • Makes recommendations for improvements
Management
<ul style="list-style-type: none"> • Future-proofs • Builds relationships • Equips others to deal with customers • Sets targets, ensuring they are met • Ensures customer is aware of relevant College services and products • Uses knowledge and expertise to ensure customer satisfaction • Plans for the future to improve services
Strategic Leadership
<ul style="list-style-type: none"> • Knows competitors • Addresses external conflict • Focusses on the long-term

- Is aware of changes and impact on others
- Overcomes barriers to improvement
- Manages risk

VALUE: FORWARD-THINKING
COMPETENCY: Conceptual Flexibility
DESCRIPTION: Takes the initiative and thinks flexibly and innovatively in order to propose solutions and deal with ambiguity. Builds trust and credibility through self-awareness.

Support & Delivery
<ul style="list-style-type: none"> • Acknowledges success and failure and learns from them • Works on own initiative and finds better ways of doing things • Acknowledges problems and suggests solutions • Remains open-minded • Adjusts to changing needs • Is aware of self and others • Contributes and adds value to operational plans
Management
<ul style="list-style-type: none"> • Encourages others to find solutions • Creates an open forum for innovation • Implements operational plans and manages risks • Realises when things are going wrong and fixes them • Maintains personal credibility
Strategic Leadership
<ul style="list-style-type: none"> • Approaches issues with fluidity and flexibility • Makes improvements at a corporate level • Implements solutions at a strategic level • Welcomes innovation from colleagues and empowers them • Challenges the status quo

VALUE: AMBITIOUS
COMPETENCY: Shared Vision
DESCRIPTION: Acts quickly and decisively, seizing opportunities and adding value.

Support & Delivery
<ul style="list-style-type: none"> • Sets personal objectives which meet operational and strategic plans • Adapts to changing priorities • Analyses problems and resolves them • Understands the impact of operational plans on own role • Deals with colleagues fairly and consistently • Keeps focused in the light of changing priorities • Sets high personal standards
Management
<ul style="list-style-type: none"> • Puts operational plans into action • Isn't afraid to make decisions • Ensures right people, right time, right place • Identifies new opportunities
Strategic Leadership
<ul style="list-style-type: none"> • Defines corporate vision and values • Handles all matters with sensitivity • Scans the horizon • Develops strategy, taking into account all external drivers

Signature:

Name:

Date: