
JOB DESCRIPTION

Job Title: Product Manager, CRM

Grade: D

Department: Product

Main purpose of job:

We are seeking a Product Manager with significant experience using Microsoft Dynamics Customer Engagement (CE) to lead the development, implementation and ongoing management of a customer relationship management (CRM) system & strategy that will enable CAF Group to better understand, engage and retain its donors and charities.

As the Product Manager for Customer Experience, CRM, you will be the key business lead in implementing Microsoft Dynamics across multiple business units at CAF, ensuring we develop a single customer view. You will collaborate closely with key users, stakeholders and developers in cross-functional teams to identify business and customer requirements and develop a delivery roadmap in conjunction with our Transformation team. You will use your knowledge of CRM and Microsoft to ensure we can connect with our customers, driving value and customer retention. The ongoing management and continuous improvement of our CRM strategy will be central to our vision of connecting more donors with charities and accelerating giving.

Responsible to: Senior Product Manager, CE Portal

Budgetary responsibilities: None

Responsible for (staff/jobs): n/a

Key Job Responsibilities:

- **Inform creation of CAF Group CRM strategy**
 - Support the development and execution of a comprehensive CRM strategy aligned with our Group aspirations to create a personalised and seamless customer & employee experience across all touchpoints and channels
 - Conduct stakeholder interviews and gather customer feedback to identify opportunities and challenges
- **Support the product roadmap / design the CRM solution**
 - Be at the heart of the development process, ensuring timely delivery of high quality CRM solutions – implementing a user centred design approach

- Listen, observe, and empathise with stakeholder needs. Understand how internal and external users interact with the CRM and the value they gain from it.
- Collaboratively define problems and ideate in problem solving. Through research and development, experimentation, prototyping, and testing, ensure new features and capabilities are easy to use and solve business problems effectively.
- **CRM centre of excellence**
 - Collaborate with internal and external stakeholders to help define and encourage best practices across business and system work-flow processes.
 - Establish regular stakeholder discovery meetings.
 - As much as possible, promote cross-function consistency as it relates to the CRM structure and processes.
 - Support business teams with documentation regarding CRM best practice and process
 - Continuous learning for all aspects of and around the CRM in its current implementation and opportunities. Understand the difference between configuration-based solutions and customization-based solutions and the implications of each.
 - Lead ongoing management of the CRM solution at a business level.
 - All CRMs do some or all of the above, but Customer Engagement CE differs from other platforms because it syncs with Microsoft's impressive ecosystem of products. Think Outlook, PowerPoint, Excel, and Word. You can integrate data from these tools with your CRM for unparalleled intelligence into customer relationships.
- **Performance / KPIs**
 - Analyse data and user feedback to iterate on existing features and identify opportunities for improvement
 - Establish and monitor key performance indicators (KPIs) to measure the success of CRM solution at CAF
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- **Risk & regulation**
 - Ensure all CRM function controls, processes, and governance is effective, customer focused and compliant with applicable legal and regulatory requirements
 - Stay abreast of all regulatory market changes relating to CRM
 - Collaborate with legal and compliance teams to ensure our products adhere to relevant standards and policies
 - Work effectively along the whole process, liaising and consulting with the relevant teams (including Legal, Compliance, IS, Finance, Customer Services, Business Development)
 - Responsible for representing and protecting CAF's reputational risks in relation to CRM

Requirements:

- Substantial experience in product management.
- You will have experience utilising Microsoft Dynamics and developing CRM solutions for organisations that work across multiple teams
- You have a passion for delivering customer-centric solutions.
- You have excellent communication, presentation, and stakeholder management skills, and can influence and align diverse teams and perspectives.
- You have a proven track record of supporting the delivery of successful products from ideation to launch, and managing complex projects in a fast-paced environment.
- You have a data-driven and analytical mindset, and can use various tools and methods to measure and improve product performance and customer satisfaction.

CAF Values and Behavioural Indicators

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.

Dated: April 2024

PERSON SPECIFICATION

Job title: Product Manager, CRM

Date: April 2024

| Attributes | Essential ✓ | Desirable ✓ | How Evidenced |
|---|----------------|----------------|---------------|
| Experience | | | |
| • Experience using Microsoft dynamics | ✓ | | A/C |
| • Experience designing complex CRM solutions | ✓ | | A/C |
| • Experience of supporting the development and delivering product strategies and plans | ✓ | | A/C |
| • Experience and proven success in translating business analysis and human needs into successful consumer products | ✓ | | A/C |
| • Track record of managing complex stakeholder relationships, including interacting with and influencing executives | ✓ | | A/C |
| • Proven track record in delivering results | ✓ | | A/C |
| • Experience of stakeholder management | ✓ | | A/C |
| • Product Management experience | ✓ | | A/C |
| • Project Management experience | | ✓ | |
| • Direct customer service/client relations experience | | ✓ | A/C |
| • Proven experience of budgeting, reporting and analysis, P&L management | ✓ | | A/C |
| • Previous experience of digital products/channels | ✓ | | A/C |
| Specialist Skills/ Ability/Knowledge | | | |
| • Detailed Understanding of Microsoft Dynamics | ✓ | | A/C/T |
| • Strong proficiency with Microsoft Office tools | ✓ | | |
| • Excellent teamwork skills | ✓ | | A/C/T |
| • Using collaborative culture to drive results | ✓ | | A/C/T |
| • Strong analytical capability | ✓ | | A/C/T |
| • Ability to formulate product strategies and plans | | ✓ | A/C/T |
| • Working knowledge of product management tools | ✓ | | A/C/T |
| • Ability to manage cross-functional teams to deliver business results | ✓ | | A/C/T |

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|---|--|--|--|
| Communication <ul style="list-style-type: none"> • Excellent written, verbal and presentation skills • Strong interpersonal skills | <ul style="list-style-type: none"> ✓ ✓ | | <ul style="list-style-type: none"> A/C/ A/C/ |
| Personal Qualities <ul style="list-style-type: none"> • A passion for leading, motivating and managing a team • Sound commercial acumen • Willingness and excitement to delve into data and systems and be comfortable with complexity • Results driven • Clear strategic thinker • Proactive problem solver • Ability to prioritise own work according to wider CAF objectives • Self-motivated, energetic and enthusiastic | <ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ | | <ul style="list-style-type: none"> A/C A/C A/C A/C A/C A/C A/C A/C |
| Prior to Appointment All posts: <ul style="list-style-type: none"> • Credit Check • Dow Jones Check • Basic DBS Check • Employment References • Medical Clearance • Right to Work in the UK | <ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ ✓ | | <ul style="list-style-type: none"> R/E |

Key

R = References, E = Evidence/Certificates, A = Application, C = Competency Interview, T = Testing/Assessment