Dynamics CRM 365 and Data Manager Job Description

Department: Operations Department
Team: Operations
Reports to: Executive Head of Operations
No. of direct reports: 0
No. of indirect reports: 0
Grade: Manager
Hours: 35 hours per week (may be a need for occasional additional hours outside of business hours and weekend work)

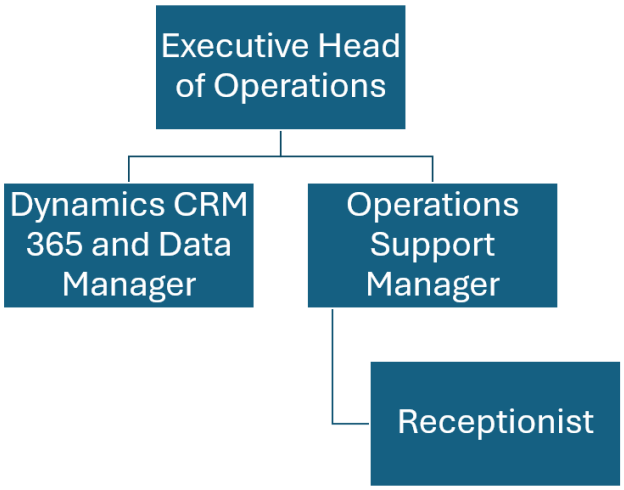
Job purpose

To lead the effective management, development and continuous improvement of the IBMS Microsoft Dynamics 365 CRM and associated member data, ensuring the CRM supports membership services, education services, operational processes, reporting and strategic decision-making.

The postholder will act as the IBMS' principal Dynamics 365 CRM specialist and system owner, maintaining the integrity and security of member and organisational data while working with colleagues to improve processes, reporting, automation and the member experience.

The Department

The Operations Team ensures the organisation runs efficiently by managing core operational processes, coordinating resources, and providing dependable day-to-day support. Focused on operational excellence, risk management, and continuous improvement, the team works collaboratively across departments to streamline workflows, resolve issues quickly, and enable colleagues to deliver their best work. As such, the Operations Department are responsible for the IBMS's premises, facilities and IT and includes front of house services.



Key tasks and responsibilities

1. Dynamics 365 CRM ownership

- Take day-to-day ownership of Microsoft Dynamics 365 and Dataverse, ensuring the platform is reliable, appropriately configured and aligned with organisational requirements.
- Administer and coordinate licences and role access permissions.
- Manage tables/entities, fields, relationships, forms, views, business rules, workflows, security roles and other CRM configuration.
- Maintain appropriate development, testing and production practices and coordinate CRM releases and system changes.
- Maintain documentation on data models and table relationships to facilitate user understanding.

2. Data management

- Develop strategies with department Data Owners for the improvement of integrity and quality of CRM data for which they are responsible.
- Develop and maintain data-quality standards and processes covering duplicate management, data cleansing, validation, imports, bulk updates and record reconciliation.
- Maintain a Data Dictionary and Data Register.
- Work with membership, education and other teams to ensure appropriate data-entry and data-management practices.

3. CRM development and continuous improvement

- Support the work of the Change Control Group by:
    - Identifying opportunities to improve business processes through Dynamics 365, Power Automate and the wider Microsoft Power Platform.
    - Gathering and document requirements from users and translate these into appropriate system improvements proposal for the Change Control Group.
    - Management of setup and release of Change Control Group agreed enhancements and manage more complex development through external Dynamics partners where appropriate.
- Manage the governance across the change control environment including the dev, UAT and live CRMs.

4. Member lifecycle and business processes

- Ensure Dynamics business processes effectively supports the member lifecycle, including:
    - membership applications and renewals;
    - subscriptions and payments;
    - professional qualifications/registrations;
    - events and CPD;
    - communications and marketing preferences;
    - committees and special-interest groups;
    - organisations/employers; and
    - member enquiries and engagement.
- Support the work of IBMS functional leads in developing CRM process maps which evidence the use of resources to underpin efficient services to IBMS service users and identify potential areas where technical improvements in delivery can be developed.

5. Reporting and insight

- Supporting functional leads to develop and own CRM views, dashboards, Advanced Query, query building and management reports.
- Support development of Power BI reporting and ensure colleagues have reliable information on membership numbers, retention, recruitment, engagement and other organisational KPIs.
- Work with senior stakeholders to improve the organisation's use of data for decision-making.

6. Integration and systems

- Work with platform leads to manage and monitor integrations between Dynamics and other platforms such as the website/member portal, finance systems, email marketing, event systems, SharePoint and other organisational applications.
- Investigate integration failures and coordinate resolution with internal colleagues and suppliers.

7. Data governance, GDPR and security

- Ensure CRM data is managed in accordance with UK GDPR, data-protection policies, retention requirements and organisational information-security standards.
- Administer CRM users, teams and security roles and ensure users have appropriate access to information.
- Work with the organisation's Data Protection Officer or equivalent on CRM-related data-protection matters including assessment of Data Protection Impact Assessment of proposed changes.

8. User support and training

- Act as the principal point of expertise for Dynamics 365.
- Provide second-line CRM support, investigate problems and coordinate technical escalation where required.
- Develop user short guidance, promote and maintain effective use of CRM throughout the organisation.
- Support role based training matrix provided by IBMS teams for user roles.

9. Supplier management

- Manage day to day relationships with Microsoft Dynamics partners and other relevant technology suppliers.
- Specify work, obtain estimates, monitor delivery and ensure external development represents value for money.
- Coordinate, prioritise and triage tickets raised by departments with external suppliers.

10. CRM roadmap

- Maintain a CRM development roadmap aligned with organisational strategy.
- Monitor developments across Microsoft Dynamics 365, Dataverse and Power Platform and recommend opportunities that could improve efficiency, member service or organisational capability.

11. Other

- Support the Executive Head of Operations and other Executive Heads with the implementation of the digital strategy and optimising the uptake of digital platforms.

- Other tasks and duties as requested by the line manager in line with departmental or organisational workload and priorities.
- Commitment to carry out the responsibilities of the post with due regard to IBMS policies and to treat colleagues and other IBMS stakeholders with respect and dignity at all times.
- Occasional travel, including overnight stays, within the UK.

Qualifications, skills, knowledge and experience

Qualifications / Training:	Essential / Desirable
Batchelors degree standard education or equivalent	Essential
Dynamics/Power Platform Microsoft certification.	Desirable
Previous Experience	Essential / Desirable
Substantial experience administering Microsoft Dynamics 365 CRM / Customer Engagement.	Essential
Experience with Dynamics APIs/integrations.	Desirable
Experience integrating Dynamics with websites/member portals.	Desirable
Experience configuring Dynamics tables, forms, views, relationships, business rules and security	Essential
Experience with **Power Automate**	Essential
Strong CRM data-management and data-quality experience.	Essential
Experience importing, cleansing and manipulating large datasets.	Essential
Experience developing reports and management information	Essential
Key Skills / Attributes	Essential / Desirable
Strong understanding of Microsoft Dataverse.	Essential
Understanding of relational data structures and data modelling.	Essential
Skilled in use of Power Apps.	Desirable
FetchXML and/or SQL knowledge.	Desirable
Knowledge of Azure services.	Desirable
Advanced Power BI skills	Desirable
Advanced Excel skills	Desirable
Other Requirements	Essential / Desirable

Understanding of UK GDPR and data governance.	Essential
Strong requirements-gathering and business-analysis skills.	Essential
Ability to translate operational requirements into practical CRM solutions.	Essential
Strong stakeholder-management skills.	Essential
Ability to work effectively with external technical suppliers.	Essential
Ability to train and support non-technical CRM users.	Essential
Dynamics experience within a professional body, membership organisation, association, regulator or charity.	Desirable
Experience of membership subscriptions, renewals, CPD, qualifications, events or professional registration.	Desirable

Signature: .....

Name: .....

Date: .....