

CRM Strategy Consultant Job Description

September 2023

Salary Range: £40,000 - £55,000 (dependent on experience)

Location: Blended working between remote, at client sites and our north London office.

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1.1 What We Need

Productle are a consultancy which helps charities do better with their data. We have been steadily growing our team since 2021 and now seek a senior consultant who will be specialist in helping charities improve their use of a wide range of CRM technologies.

1.2 About Productle

We are a small, specialist agency, here to guide charities, universities, schools and social enterprises to make the most of their data and systems. We enable that change by also handling the detail required to maintain all sorts of CRMs. Founded in 2014, we are a growing team of around 10 consultants and several associates who have all worked for charities and love the challenges we face.

Our services are centred on supporting the lifecycle of CRM. This includes support for system selection and adoption, including testing and change management. We ground this in “day-to-day” support: managed services to help maintain or temporarily support CRMs, and projects to help with significant change such as supporting integrations, onboarding new departments or retiring older software.

We lean on our decades of technology development and management experience across hundreds of organisations. This includes experience as fundraisers, CRM analysts, application developers, building data analytics, running a social enterprise, and deploying software globally.

Productle has had the pleasure of overseeing the selection and implementation of CRMs, as well as supporting data systems on a day-to-day basis for a range of charities and social good organisations. A track record of successfully working through data challenges, with a breadth of expertise across all the popular charity systems, we support our clients through each stage of the CRM lifecycle.

Productle has considerable experience improving organisation performance, with decades of experience with charity data systems, as well as experience overseeing change across several kinds of CRM software, ticketing systems, email automation platforms, and digital environments. The Productle team have worked with almost every size and shape of charity, regularly supporting from the very small like Scene & Heard, to national organisations including Crohn’s and Colitis UK, Beat Eating Disorders, Christian Aid, and Alzheimer’s Research UK.

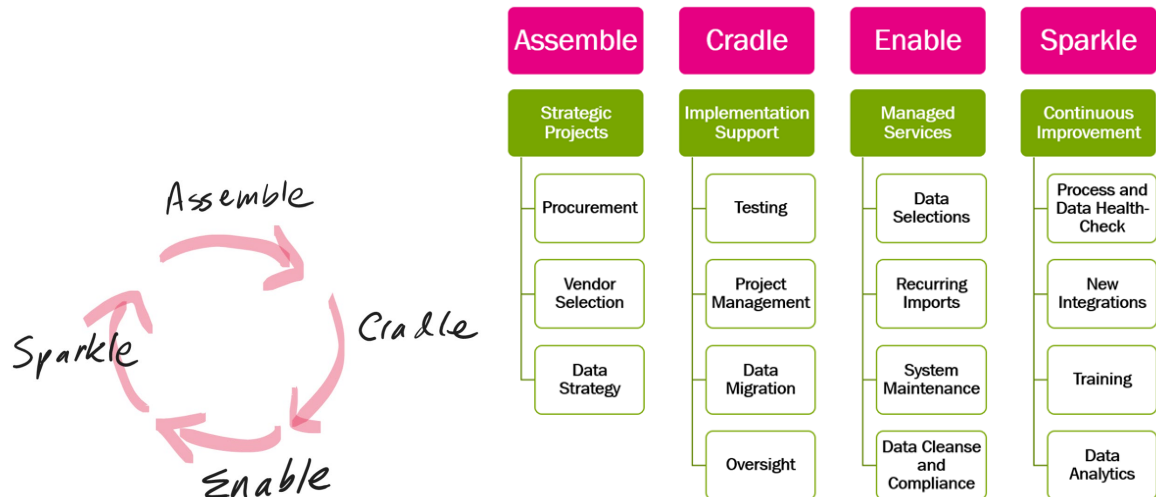
We work in an environment of transparency, with a singular focus on our customers gaining improved performance and excellent customer service.

Please visit our website to find out more - www.productle.com



1.3 Role Description

There are four main business areas at Productle, constructed to support charities at different stages of their CRM use. This role is responsible for delivering CRM strategic projects (Sparkle, Assemble) as well as, depending on the consultant's expertise, on occasion supporting other project workstreams (Cradle, Enable) to Productle clients. There are career growth opportunities into leading operational projects, to public-speaking opportunities, to developing new project types. The role holder will have a blend of technical, analytical and relationship competencies with the emphasis on their technical aptitude.



Above: The four main business areas at Productle, constructed to support clients at different stages of their CRM use.

The post holder will need to have leadership experience with a blend of technical, analytical and relationship competencies with the emphasis on their technical aptitude. All roles currently report to either the Founder/CEO or the Client Services Manager. This role reports to the Founder/CEO.

1.4 Working at Productle

Successful post holders will enjoy:

- 5 per cent employer pension contribution adding up to a minimum 10 per cent overall.
- 25 days per year holiday plus bank holidays.
- Working in a supportive, small business environment which offers growth and experience opportunities.
- Options for flexible working.
- Employee Assistance Programme.
- Opportunity to learn new skills and get involved with various projects and aspects of the business.
- Training opportunities, team days and socials.

Our Values

We are curious: We work to gain a deep understanding of our clients and their challenges so we know how to best support them.

We are passionate: Our focus is helping organisations that do good, do better, by improving how they work with their data.

We are optimistic: We understand that every problem holds opportunity and every failure can lead us closer to success.

1.5 Key Responsibilities

On projects:

- Act as a key client-facing representative and charity data subject matter expert throughout the relationship lifecycle, including prospect visits, onsite consultative work, and on-going account management. Must be perceived as an industry expert by clients and prospects.
- Delivering solution implementations for clients by guiding them through full life cycle of implementation from needs gathering, through procurement, discovery, design, deployment and post-deployment phases.
- Perform user requirements analysis; facilitate business process design sessions, identify gaps, issues and reporting risk areas as part of a project team.
- Chair meetings and deliver presentations to audiences ranging from senior management to system end users.
- Ability to synthesize the needs of the charity we are working with to support the change needed.
- Translation of business processes and requirements into business process flow documentation, solution design, and system configurations.
- Train clients on how to most effectively navigate solutions that Productle design, or software we support – in particular including Raiser’s Edge, Dynamics 365, Salesforce, eTapestry, Alms, ThankQ and Donorfy.
- Proactively report and/or escalate opportunities or concerns arising from client facing work as appropriate.
- Ensure an appropriate and up-to-date systems manual in place for each client in order to support, and lead the systems manual handover at contract-end.
- Lead on project work and deliverables.

Internally:

- Line management opportunity, if appropriate, of CRM consultants.
- Form part of the leadership team which involves developing the direction of the company and various associated workstreams e.g. branding, marketing, staff training etc.
- Leverage data from more junior Productle colleagues to produce and present a monthly summary report for clients.
- Drafting commercial proposals as well as client reports (e.g. systems assessments, review, writing recommendations).
- Support coaching and mentorship of internal consultants.



- Proactively report and/or escalate opportunities or concerns arising from client facing work as appropriate.
- Meet utilisation targets as outlined in advance by your line manager.
- Undertake timely expenses and time-keeping administration.
- Other duties as required by the Management team to support the organisation's mission to deliver high-quality consulting to charities and small companies, including research, marketing and administration activities.

1.6 Person Specification

The successful candidate will need to have a love of data, good process, customer service and working in a supportive team.

Essential

- Genuine interest in helping charities and other organisations to use their systems and data more effectively.
- Experience working with CRM and deep understanding of at least one major CRM system.
- Strong communication skills, both verbal and in writing, with the ability to concisely describe issues.
- Ability to produce documentation for clients, including commercial proposals, assessments, and tender documentation.
- Experience chairing meeting and delivering presentations.
- Commercial acumen and business intelligence.
- Ability to work well in a team, including clients and consultants.
- Interest in sharing skills and experience with consultant colleagues.
- Experience developing, both strategic and technical documentation such as data systems assessments, process maps and user guides.
- Evidenced strong competency with technical systems e.g. Marketing Automation, Advanced Excel.
- Strong organisational skills and ability to work on several different projects for various clients simultaneously.

Desirable

- Experience supporting fundraising roles and managing GDPR-related processes.
- Strong competency with the following systems SQL, PowerAutomate, PowerBI.

Importantly we are looking for candidates who are excited to work in a small business in this type of role and share our values.

Training and ongoing support will be provided to the successful candidate.