|  |  |  |
| --- | --- | --- |
|  | |  | | --- | | The Hospice of St Francis Charity provides essential free care across West Hertfordshire and South Buckinghamshire and inspires people to raise over £5million every single year to fund this care. Our care at home and in the Hospice, delivered through inter-disciplinary teams and skilled volunteers is rated outstanding by the Care Quality Commission. As a local employer we aspire to meet this ‘outstanding’ rating in all aspects of what we do, from the experience of staff and volunteers through to our compliance with the corporate, financial, fundraising, charity and trading regulations for our business.  The CRM Administrator will support the implementation, management, and maintenance of the Hospice’s CRM system. Their role revolves around ensuring the CRM platform functions smoothly and helps the Hospice manage customer data effectively. | |

**Band** **3**

**Accountable to**: **CRM Manager**

**Direct Reports: None**

# Main duties and responsibilities:

As a CRM Administrator, you will be responsible for the administration, configuration, and ongoing support of the Hospice’s CRM system.

You will work closely with Fundraising, Trading and Finance teams to ensure that the CRM tool meets the Hospice’s needs and supports customer/donor engagement strategies.

* **System Configuration and Maintenance:**
  + Configure and maintain the CRM system (Donorflex / Donorfy)
  + Ensure system settings, data structures, and user permissions are optimised
  + Perform regular updates, system patches, and troubleshoot issues related to CRM functionality
* **User Support and Training:**
  + Provide support to users across departments regarding CRM usage and functionality
  + Conduct training sessions for new users and provide ongoing training for existing users
  + Assist in creating user documentation and guidelines for CRM usage
* **Data Management:**
  + Oversee data quality and integrity within the CRM system, ensuring data is accurate, clean, and properly categorised
  + Assist the CRM Manager with processes to monitor data import, export, and integration with other systems
  + Regularly audit the CRM database alongside CRM Manager to remove duplicates, correct errors, and maintain high-quality data
* **Reporting and Analytics:**
  + Alongside the CRM Manager, create, manage, and optimise reports and dashboards to track key performance indicators (KPIs) for sales, marketing, and customer service teams.
  + Provide analysis and insights on customer data to inform business decisions and strategies
* **Collaboration with Teams:**
  + Work closely with Fundraising, Trading & Finance teams to align CRM functionality with Hospice requirements
  + Support the development and execution of marketing campaigns, ensuring integration with CRM systems for accurate tracking and reporting.
* **System Integrations:**
  + Support the CRM Manager to ensure smooth integration of the CRM system with other software platforms
* **Security and Compliance:**
  + Assist the CRM Manager to ensure that the CRM system complies with data protection laws and company security protocols (e.g., GDPR in the UK).
  + Monitor and enforce proper security practices to protect customer data

|  |  |
| --- | --- |
| **Qualifications, Skills, Experience, Knowledge & Approach** | * A degree in IT, Business Administration, Marketing, or a related field is desirable but not essential * Relevant CRM administration * Strong problem-solving and troubleshooting skills. * Ability to manage multiple priorities and work independently. * Strong organisational and time-management skills. * Attention to detail and a commitment to maintaining high-quality data. * Experience working with stripe * Experience working with Donor Flex/ Donorfy is desirable * Experience carrying out data imports |
| **Key Accountabilities, Responsibilities & Tasks** | |
| **Communication** | * Strong communication skills * Excellent relationship building skills |
| **Internal & External Contacts** | * CRM Manager & fellow CRM Administrator * Fundraising, Trading & Finance Teams * CRM database support organisations |
| **Decision Making** | * Analytical thinker – ability to analyse data * Strong problem solver |
| **Mental and Physical Consideration. Working Conditions & Environment** | * Commitment to the aims and ethos of the Hospice * Continually strive to improve the business * Development of others to succeed * Keen to develop self within role * Ability to work alone with guidance and support from manager * Frequent interruptions with unpredictable workload |
| **Health & Safety** | * Understand and comply with all Health and Safety, Fire and Infection Control regulations * Complete all mandatory training and ensure compliance of direct reports and contractors |
| **Safeguarding** | * Act in a manner at all times to safeguard the interests of individual patients/clients and their families and justify public trust and confidence in the Hospice of St Francis |