

Reports To:	Head of Business Management
Direct Reports:	None
Location:	Hybrid
Hours:	Up to 37 hours a week
Salary:	£35,145 - £39,765 pro rata per annum (Solent Mind band E)

Purpose:

Ensure effective technical leadership and day to day management of our CRM systems and digital systems within Solent Mind and work to maximise their potential to respond to the charity, service user, and staff needs. To embrace and champion digital systems at Solent Mind, working with operational teams to develop the system and identify the training needs.

Principal Accountabilities:

Manage and implement changes as part of the continuous development of our new primary CRM, other CRMs and internally facing digital systems to ensure they run smoothly and effectively, meeting Solent Mind quality standards. This includes our main CRM for service user management, alongside our fundraising CRM, and finance and HR systems.

Identify how our CRMs and digital systems can best meet needs, configure and implement new features, tools, automations and updates.

Work alongside teams to support identify and address training needs and map our internal processes and use these to create and modify automation, system flows/processes.

Manage users and their security profiles to protect sensitive information.

Ensure data security and protection are always maintained, working with the DPO/SIRO to identify and implement appropriate GDPR processes.

Monitor and maintain our data's integrity and quality by conducting regular maintenance, audits, software updates as well as supporting service delivery teams to input high quality data.

Manage the work and relationship with our third party developers, suppliers and IT/QuoStar to support with continuous development of our digital systems

Keep an up-to-date log of all system issues and priorities.

Act as support to troubleshoot any errors or issues within systems.

Manage and respond to support requests from staff.

Support the design and delivery of training around the CRMs, digital systems, data quality and procedures.

Look at ways in which systems can interface with other (ie. NHS) systems going forward to increase accuracy and decrease workload at a service level.

Support service onboarding and offboarding processes, ensuring completeness of Solent Mind data.

Support the Insights Analyst with developing systems to ensure accurate reporting of management data.

Share and implement learning with colleagues across Solent Mind.

General:

Adhere to the aims, values, policies and procedures of Solent Mind, particularly safeguarding and health & safety.

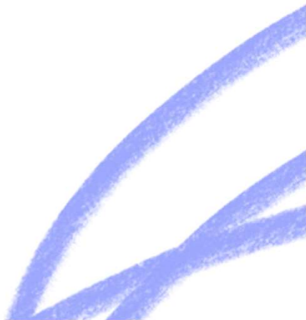
This list is non exhaustive and other duties may be required to meet the needs of Solent Mind



PERSON SPECIFICATION

CRM and Digital Systems Manager

Requirement	Essential or Desirable
<p>Qualifications/Education/Training</p> <p>Minimum of level 4 qualification or equivalent, or capability and willingness to work towards IT/Database/Computer Science qualifications in any relevant subject for CRM, or equivalent experience</p>	<p>Essential</p> <p>Essential</p>
<p>Experience</p> <p>Database management, segmentation, reporting and data cleansing</p> <p>Data import and export with CRM and digital systems</p> <p>Strong system analysis and problem-solving skills</p> <p>Proven success in leading CRM/systems training and adoption processes</p> <p>Experience with Salesforce platform development</p> <p>Implementation of new CRM and digital systems</p> <p>Ability to understand and put into context how different areas of work inter-relate in order to map workflows and develop CRM systems further</p> <p>Complex Excel functionality, such as Power Query, Power Pivot, Pivot Tables & VBA</p> <p>Project management</p>	<p>Essential</p> <p>Essential</p> <p>Essential</p> <p>Essential</p> <p>Desirable</p> <p>Desirable</p> <p>Desirable</p> <p>Desirable</p>



Requirement	Essential or Desirable
Knowledge/Skills/Competencies:	
Fully understands the value CRMs and digital systems can deliver	Essential
Knowledge of common CRM software tools and their application	Essential
Excellent organisational and time management skills with the ability to work under pressure, prioritise and progress key tasks	Essential
Ability to problem solve and introduce and embed new ways of working	Essential
Able to engage, enthuse and motivate colleagues and partners	Essential
Personal determination to drive change, as well as organise self and others	Essential
Ability to self-reflect and learn from experience and specific situations	Essential
Excellent IT & Digital skills (MS Office and Customer Relationship Management Systems)	Essential
Proven ability to develop and deliver effective training	Desirable
Understanding of or lived experience of mental health issues	Desirable
Knowledge of the charity sector, fundraising and regulation, including GDPR	Desirable
Other:	
Commitment to Solent Mind's values	Essential
Commitment to Solent Mind's Equal Opportunities and Diversity and Inclusion Policies	Essential
Willingness to undergo a relevant DBS Check if required	Essential

Date job originated: March 2025
Date job reviewed: March 2025
Reviewing Manager: Ian Stiff