

# CRM Administrator

Cambridge Institute for Sustainability Leadership  
(CISL)

Closing Date: 12<sup>th</sup> May 2024  
Job Reference: EN41060



# CRM Administrator

**Salary:**  
£32,332 - £38,205

**Contract:**  
Permanent

**Location:**  
Cambridge/Hybrid Remote

**Department:**  
Institute for Sustainability Leadership

**Team:**  
Corporate Relations, Communications & Marketing

**Working Pattern:**  
Full Time

**Purpose of the Role**

The role holder assists in the management of the Institute CRM so that the benefit to the Institute is maximised. This includes acting as the subject matter expert on CRM functionality, systems issues and best practice. The CRM Administrator works to support the strategic development of different use cases for the CRM, from the structuring of new digital business processes, to the ordering, gathering, and cleansing of data. The role holder helps design and manage systems enhancements and technical developments; and documents system requirements, business processes and other systems-specific information to ensure efficiencies in staff time. The role holder provides strategic management reports, oversees the link between the email\_package and the CRM, keeps abreast of industry developments and owns the relationship with the CRM support vendor.

The CRM Administrator plans and manages a training schedule colleagues, and provides first-line support, escalating any problems that cannot immediately be resolved to the CRM vendor ensuring that response times meet internal service level agreements.

**The Role**

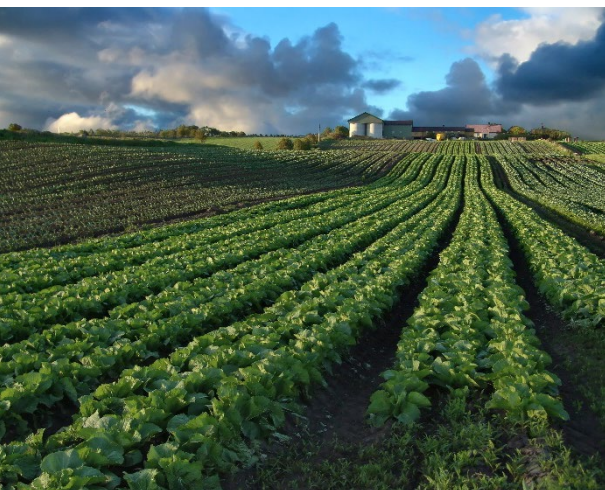
The CRM Administrator is the key support for much of the system development of the CRM, as well as the day-to-day management and administration of it. The role

supports the use of CRM across 160 staff, embedding use cases, providing management reports, managing problem-solving, monitoring and managing the quality of data for usability and compliance purposes, and providing training, documentation, reporting and first-line support for staff. The role holder supervises the use of CRM, and via deep understanding of business processes, ensures joined-up approach to its strategic development.

The purpose of the CRM is to support CISL’s business growth, efficiency and effectiveness via a future-proofed tool to:

- support business relationship development during marketing, development, delivery and post-delivery of initiatives and programmes.
- allow better internal collaboration, communication and co-ordination.
- enable more efficient workflows within and between departments.
- keep and maintain high-quality, rich, GDPR-compliant data from collaborative sources which can be reported on with transparency.

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## **Main duties and responsibilities**

### **CRM system development**

Supports on the design, management and execution of system development changes to fulfil the Institute's strategy and activities as they evolve over time. Keeps an up-to-date log of all issues and priorities.

Is CISL's subject matter expert on the business as usual D365 system, maintaining a detailed understanding of the CRM: its functionality, purpose and how it supports CISL staff in their business needs and use of the system.

Supports in the defining, project management, documentation and embedding of key strategic improvements to the CRM where this links to other digital systems, for example to enable enhancement of user data, and preference and subscription centres. Works in partnership with senior stakeholders in scoping and delivering the projects.

Manages project approach with internal and external stakeholders, and helps prepare realistic plans (including quality, risk and communications plans) and tracks activities against the project schedule, managing stakeholder and supplier involvement as appropriate. Supports in identification, assessment and management of risks to the success of the projects. Helps monitor costs, timescales and resources used, and takes action where these deviate from agreed tolerances.

Is responsible for CISL's third-party relationship with the support group of the CRM vendor. Via this close relationship, and own research, anticipates issues or central changes to the D365 system, and manages the dissemination to staff.

### **Problem management**

Acts as the Admin lead for the Dynamics 365 CRM, performing super-user administration tasks, providing first-line help desk support for all system users, and troubleshooting issues with the platform and third-party tools.

Investigates and resolves problems in the D365 and related system raised by CISL's users. Determines problem fixes/remedies. Ensures all issues are documented.

Designs and delivers the implementation of agreed remedies and preventative measures, and disseminates best practice.

### **Project management and development of digital use cases**

Ensures that such improvement projects have formal user acceptance testing where appropriate, and subsequently reviews the projects and ensures that lessons learned are recorded.

Assists in the design, development and implementation of efficient processes / workflows conforming to simple best practice and functional needs of the staff, and manages the testing programme. Through ongoing CPD, solves issues before they go to the vendor.

Documents all business processes, procedures, best practice guidelines, development work and other systems-specific information. Ensures these are reviewed annually.

Optimises CISL's use of SharePoint to act as a repository for documents attached to CRM records, or communications, project or marketing collateral.

### **Data quality**

Maintains overall management of data quality for the Institute, overseeing data cleansing and looking for continuous improvement in data accuracy, and its compliance with GDPR. This work is alongside CISL's GDPR officer and the wider matrix of CISL data stewards.

Creates best-practice guidelines on cleansing data before import, so that teams maintain their own data as far as possible. Corrects data where required, in liaison with the data owners.

Manages the importing of non-CRM data sets ensuring their accurate mapping to CRM fields, data cleanliness and de-duplication, and GDPR compliance.

Ensures data security and protection is maintained at all times. Manages the control of access rights, security and user privileges ensuring sensitive information is well protected, including de-provisioning ex-employees.

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**Reporting and data analysis**

On request, develops strategic reporting, including for senior management. Uses in-depth knowledge of portfolio business processes and targets to help design and manage custom reports and dashboards, ensuring they are fit for purpose and saved to team or individual profiles, and ensuring consistency, clarity and a 'single version of the truth' across the Institute.

Key point of contact for the delivery of information required by all areas of the business that colleagues themselves cannot extract, via tailored reports.

**Manages the training and development programme**

Owns overall training material and guidance. Creates ongoing guidance for CRM users and provides training sessions or manages more junior staff to undertake the sessions. Works collaboratively with stakeholders across the Institute to identify, design and deliver training programmes for a variety of audiences.

Encourages best practice, ensuring maximum benefit is derived, and visibility of required information and reporting is optimised.

Monitors and encourages user engagement on an ongoing basis via, eg, internal communications and user groups. Writes, implements and assesses compliance with best practice guides, policies and procedures.

**Staff management and supervision**

Is responsible for disseminating the best practice use of the system by 175 staff across the Institute.

Instructs junior staff in elements such as testing and delivery of training. Convenes and supervises a group of senior peer CRM super users.

# Behavioural Attributes

This section summarises the behavioural attributes (or competencies) that we expect the role holder to be able to demonstrate.

Please review these and provide specific examples in your application of how you have demonstrated these attributes in your work, education or other experience. It will assist your application if you explain the situation, what you did and what the outcomes were.

- Building Effective and Collaborative Relationships

Develops collaborative and cooperative team working by showing concern, respect and recognition towards those working towards the same goal, building beneficial longterm relationships internally and externally to achieve the desired results.

- Communication

Ensures the content and style of both verbal and written communication suits the intended audience and is delivered in a clear, interesting and appropriate way that inspires confidence and enthusiasm from others.

- Strategic & Creative Thinking

Thinks through and considers new/creative ideas, viewpoints and perspectives, understanding and evaluating a situation quickly to visualise a way forward and ensure the right actions are taken.

- Delivering Results

Delivers actions and required results through proactive accountability and responsibility, following through tasks at the pace required in any given situation.

- Planning & Organising

Plans ahead realistically, determining and prioritising what needs to happen, how and when, and organises activities / resources to deliver organisational and customer tasks and objectives effectively and on time.

- Customer Focus

Understands the customer, delivering and exceeding their expectations to support our brand reputation and integrity.

- Leadership

Inspires, motivates and demonstrates a sense of direction, vision and energy with confidence, trust and commitment to enable teams and individuals to achieve a plan or goal.

# Professional Services Values

Developed by professional services staff, our values underpin everything we do. By living the values in the work we do, we hope to foster an environment where staff feel empowered. The values encourage staff to; work together and share skills to create a sense of community, act with integrity, take an inclusive and fair approach and develop honest and open relationships that are underpinned by our shared values. We encourage applicants to consider these values within their application.



# Person Specification

Criteria	Essential	Desirable
<b>Education</b>		
Degree level/Level 6 vocational qualifications or equivalent level of practical experience.	✓	
<b>Experience</b>		
Experience in Dynamics 365: user administration, training, first-line support and user acceptance testing.	✓	
Strong working knowledge of associated technologies including Microsoft Dynamics CRM for Outlook Client, Office 365, Power BI and ClickDimensions.	✓	
Experience in project administration.	✓	
Experience with data management and GDPR compliance.	✓	
Experience of the use of CRM systems to support and underpin marketing activities.	✓	
Experience of the use of CRM or other systems to manage projects involving multiple stakeholders.	✓	
Knowledge of Scribe and SQL.		✓
<b>Skills</b>		
Strong logical and analytical thinking, and problem-solving skills	✓	
Excellent organisational skills, accuracy and attention to detail	✓	
Good interpersonal and written and verbal communication skills, including the ability to communicate effectively with management, administrative staff, colleagues and IT professionals	✓	
Excellent IT skills	✓	
Good time management and ability to prioritise a diverse and changing workload	✓	
<b>Additional Information</b>		
Interest in CISL's core values and the field of sustainability.		

# About CISL



CISL is the University of Cambridge Institute for Sustainability Leadership, founded in 1988. We activate leadership globally to transform economies for people, nature and climate.

We are impact-led, independent and evidence-based. Through a unique combination of Foresight, Education, Convening, and Innovation we build movements for impact. Movements that connect disruptors and incumbents. Movements that align the levers of business, finance, policy and technology for faster, scalable results.

We are known, respected and trusted because of the credibility of our purpose, our independence within a leading research university, our commitment to bridge divides and forge alliances, and the safe space we create for critical discussions and speaking truth to power.

With our [headquarters](#) in Cambridge, now an internationally recognised exemplar for sustainable retrofit, and offices in South Africa and Belgium, CISL is poised to catalyse positive [impact](#) at ever higher levels. Our [global community for action](#), with over 30,000 leaders and pioneers, is central to this vision.

## What we do

Our four levers to catalyse change and accelerate the path to a sustainable economy:

**Education:** We empower thousands of individuals and hundreds of organisations each year to take leadership and drive systemic change.

**Foresight:** We harness research and develop new thinking and resources to support innovation and transformation in sustainable business and policy practice.

**Convening:** We engage governments, business and finance to establish new norms and reshape policies that benefit society and the environment.

**Innovation:** We provide the space, support and networks for innovations in sustainability to thrive and grow.

Our global community of over 30,000 leaders and innovators is committed to taking individual, collaborative and collective action to accelerate the movement towards sustainable societies and economies.



# About CISL

## Who we work with

CISL works with organisations and individuals with the potential to catalyse, lead or influence transformative and systemic change at pace and scale. We work with businesses, governments, and financial institutions, with potential for influencing economic, social and environmental systems. We also work with thousands of individuals internationally who are seeking to build their capability to contribute to change.

We recognise that delivering system change at scale is complex and multifaceted. Almost every organisation or individual is currently working inside a context that is deeply unsustainable and there is therefore a need for them to change their own actions, improve their own organisational performance, and work to change the context itself.

Our global community for action include over 30,000 senior leaders and practitioners from business, government and civil society who have an impact in every sector and on every continent.

Our work also draws upon an expert group of [Fellows](#) and [Senior Associates](#), comprised of business leaders, academics and other influential thinkers who have direct experience of working to address sustainability challenges.

The former HRH The Prince of Wales was Royal Founding Patron of the University of Cambridge Institute for Sustainability Leadership (CISL) and has been actively involved in a range of our work.





# Terms of Appointment

## Tenure and probation

Appointment will be made on a permanent basis.

Appointments will be subject to satisfactory completion of a probationary period of 6 months.

## Hours of Work and Working Pattern

The hours of work for the position 36.5 hours per week, working Monday – Friday.

## Pension

You will automatically be enrolled to become a member of CPS (Contributory Pension Scheme) – a defined benefit and defined contribution pension scheme. For further information please visit: [www.pensions.admin.cam.ac.uk/](http://www.pensions.admin.cam.ac.uk/).

## Annual leave

Full time employees are entitled to annual paid leave of 36 days inclusive of public holidays. For new part-time employees, annual leave will be pro-rated based on days worked.

## Pre-employment checks

### Right to work in the UK

We have a legal responsibility to ensure that you have the right to work in the UK before you can start working for us. If you do not have the right to work in the UK already, any offer of employment we make to you will be conditional upon you gaining it.

**Health declaration** Once an offer of employment has been made the successful candidate will be required to complete a work health declaration form.

### Qualifications

The person specification for this position lists qualifications that are essential and/or desirable. Please note that if you are offered the post you will be asked to provide your relevant original certificates of these qualifications.

**References** - offers of appointment will be subject to the receipt of satisfactory references.

### Information if you have a disability

The University welcomes applications from individuals with disabilities. We are committed to ensuring fair treatment throughout the recruitment process. We will

make adjustments to enable applicants to compete to the best of their ability wherever it is reasonable to do so and, if successful, to assist them during their employment.

Information for disabled applicants is available at <http://www.admin.cam.ac.uk/offices/hr/staff/disabled/>

We encourage you to declare any disability that you may have, and any reasonable adjustments that you may require, in the section provided for this purpose in the application form. This will enable us to accommodate your needs throughout the process as required. However, applicants and employees may declare a disability at any time.

If you prefer to discuss any special arrangements connected with a disability, please contact, the Department Administrator, who is responsible for recruitment to this position.

# The University

**The University of Cambridge is one of the world's oldest and most successful universities. We are a renowned centre for research, education, and scholarship that makes a significant contribution to society. The University is consistently ranked amongst the top universities in the world. Our affiliates have won more Nobel Prizes than any other University.**

Our sustained pursuit of academic excellence is built on a long history of first-class teaching and research within a distinctive collegiate system. For eight centuries our ideas and innovations have shaped the world. Our principal goal is to remain one of the world's leading universities in an increasingly competitive global higher education sector. Today the University of Cambridge is at the centre of a cluster of over 4,300 businesses employing 58,000 people.

Our capital investment projects include the West Cambridge site, the North West Cambridge development and the growth of the Biomedical Campus in the south of the city. The North West Cambridge development includes the opening of a primary school – the first in the UK to be managed by a University. So we are deeply embedded in, and committed to serving, our local community. These are all conspicuous signs of a University that is not only adapting to new needs, but also anticipating the future.

Our mission is to contribute to society through the pursuit of education, learning, and research at the highest international levels of excellence. Our core values are:

- freedom of thought and expression; and
- freedom from discrimination.



# About Us

**The University is one of the world's leading academic centres. It comprises 150 faculties and departments, together with a central administration and other institutions. Our institutions, museums and collections are a world-class resource for researchers, students and members of the public representing one of the country's highest concentrations of internationally important collections.**

The University has an annual income of £2 billion. Research income, won competitively from the UK Research Councils, the European Union (EU), major charities and industry, exceeds £500 million per annum and continues to grow.

The Colleges and the University remain committed to admitting the best students regardless of their background and to investing considerable resources both in widening access and financial support. The 31 Colleges are self-governing, separate legal entities which appoint their own staff. Many academic staff are invited to join a College as a Teaching Fellow, which provides a further social and intellectual dimension. The Colleges admit students, provide student accommodation and deliver small group teaching.

The University awards degrees and its faculties and departments provide lectures and seminars for students and determine the syllabi for teaching and conducting research.

Our instinct for seeking out excellence and setting up enduring and mutually beneficial collaborations has led us to establish strategic partnerships across the globe. Whether it is the successful Cambridge-Africa Programme involving universities in Ghana, Uganda and elsewhere on the African continent; or the close association with the government of India to pursue new research in crop science; or the creation, with Germany's Max Planck Institutes, of a Cambridge-based centre for the study of ethics, human economy and social change – international partnerships are now an inextricable part of the University's make-up.

“Cambridge graduates and researchers have made – and continue to make – a colossal contribution to human knowledge and the understanding of the world around us. Their work touches on the lives and livelihoods of everyone from patients diagnosed with life-threatening diseases, to residents of areas critically affected by climate change, to children growing up in conflict zones. It has a lasting impact on our society, our economy and our culture: the world is truly a better place thanks to their efforts.”

*Stephen Toope, Vice Chancellor 2019*





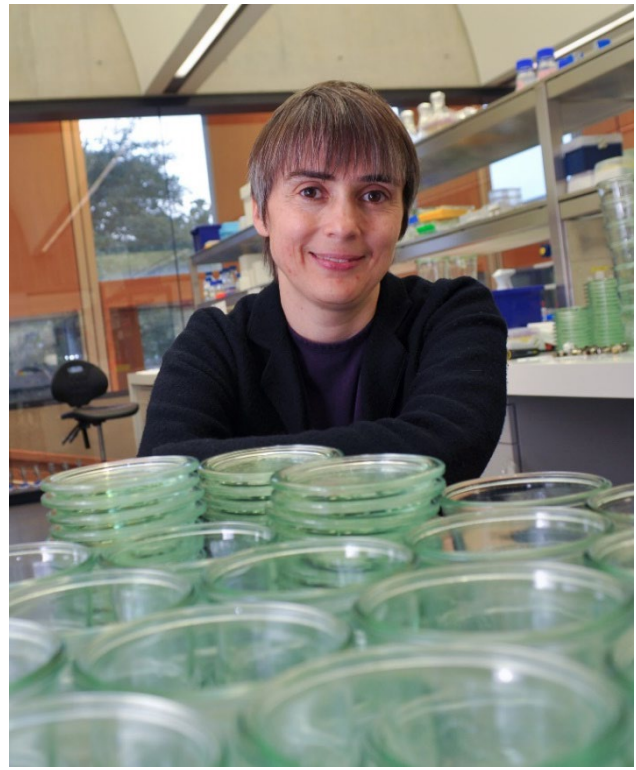
# Working at the University

**Working at Cambridge you will join a diverse, talented and innovative community, with more than 18,000 students and over 16,000 staff from all walks of life and corners of the world.**

The University continually explores strategies to attract and retain the best people. It is committed to supporting its staff to achieve their best. We are a fair, diverse and inclusive society and we believe our staff are our greatest asset. There is strong commitment to developing institutional leadership and supporting and encouraging staff development at all levels.

We offer a variety of roles including academic, research, professional, managerial and support roles. We also offer extensive benefits and excellent learning opportunities within a stimulating working environment.

The University's estate is undergoing the most significant transformation in its history. Cambridge has been able to create a new science and technology campus to the west of the city centre, and is now expanding further to the north west of Cambridge including investing in affordable homes for University key workers and community facilities. Even with our continued development, the University remains within walking or cycling distance across the campus. The University is a major partner on the Cambridge Biomedical Campus and we continue to redevelop our historic city centre sites demonstrating our determination to ensure that we can offer the best facilities and opportunities for our staff and students.



## Equality & diversity

The University has built its excellence on the diversity of its staff and student community. We aim to be a leader in fostering equality and inclusion, and in promoting respect and a sense of belonging for all. We encourage applications from all sections of society. All appointments are made on the basis of merit. We have an Equal Opportunities Policy, along with a range of diversity networks for women, black and minority ethnic and lesbian, gay, bisexual and transgender staff. More details are available here: <http://www.equality.admin.cam.ac.uk/>

The University has a bronze Race Equality Charter aware, with framework for improving the representation, progression and success of minority ethnic staff and students within higher education. Furthermore, the University's Athena SWAN award recognises and celebrates good practice in recruiting, retaining and promoting women.

# Living in Cambridge

**Cambridge is rich in cultural diversity. From beautiful University and College buildings, museums and art galleries, quaint gardens and punts on the River Cam, to a vibrant restaurant and café scene, our employees are surrounded by the wonderful features of this unique city.**

You can find a wide-range of high street shops and 3 shopping centres, with independent alternatives at the historic market and nestled within the passageways in the city centre. You will find a cinema, bowling alley, a nightclub and various live performances At the Cambridge Leisure Park, with further entertainment options at the Corn Exchange, Arts Theatre and the ADC Theatre. Further information can be found on the Visit Cambridge website.

If you prefer the faster pace of life, London is a 45 minute train journey away. For those travelling from overseas, Stansted Airport is just 45 minutes away and Heathrow Airport under 2 hours away. The University is a short distance from a host of other attractions such as Ely Cathedral, Newmarket Races and various wildlife parks and stately homes. Cambridge is also within easy reach of the beautiful Broads and coastlines of Norfolk and Suffolk.

## Relocation Support

The University recognises the importance of helping individuals to move and settle into a new area. We provide support and guidance to those relocating internationally or domestically to take up a post at the University of Cambridge, liaising with other University offices and selected partners to ensure comprehensive relocation support is available. This includes: accommodation, childcare, schools, banking, immigration and transport. If you would like further information, please visit <https://www.accommodation.cam.ac.uk/relocation>. The Shared Equity Scheme and the Reimbursement of Relocation Expenses Scheme provide financial assistance to qualifying new members of staff with the costs of relocating to Cambridge.

## Accommodation Service

The University Accommodation Service helps staff, students and visiting scholars who are affiliated to the University in their search for suitable accommodation in Cambridge. The dedicated accommodation team can provide access to a wide range of University-owned furnished and unfurnished properties, and has a database of private sector accommodation available for short and long-term lets. For further information and to register with this free service please visit <https://www.accommodation.cam.ac.uk/>





# What Cambridge can offer

**We offer a comprehensive reward package to attract, motivate and retain high performing staff at all levels and in all areas of work.**

The University offers a wide range of competitive benefits, from family leave entitlement, to shopping and travel discount schemes. Our generous annual leave package contributes to the positive wellbeing of our University employees. Sabbatical leave enables academics to focus on research and scholarship, whilst still maintaining their full salary. The University also has a [career break scheme for academic and academic-related staff](#), with additional flexible working policies for all other staff.

## Pay and benefits

The University salary structure includes automatic service-related pay progression in many of its grades and an annual cost of living increase. In addition to this, employees are rewarded for outstanding contribution through a number of regular pay progression schemes. The University offers attractive pensions schemes for employees, with an additional benefit of a salary exchange arrangement providing tax and national insurance savings. Payroll giving is also a simple, tax-efficient way for employees to make monthly donations to charity.



## CAMbens employee benefits

We offer a CAMbens scheme for University employees, providing access to online and in-store shopping discounts and cashback. With more than 2,000 participating retailers, employees can save money on a wide range of household expenses, from groceries and clothes, to holidays and insurance and much more. A range of local discounts are also available, helping employees to save money whilst also supporting local Cambridge businesses and a CAMbens Cycle to Work salary sacrifice scheme is also available, which enables employees to save money on transport costs. A 10% discount rate on the [purchase of train season tickets, bulk buy tickets](#) and an interest free travel to work loan are also available for staff of the University.





# What Cambridge can offer

## Family-friendly policies

The University recognises the importance of supporting its staff. We have a range of family-friendly policies to aid employees' work-life balance including a generous maternity, adoption and shared parental leave entitlement of 18 weeks full pay and emergency family care support via My Family Care.

Other family-friendly support includes:

Our highly regarded workplace nurseries, a childcare salary exchange scheme and a high quality holiday Playscheme may be available to help support University employees with caring responsibilities (subject to demand and qualifying criteria). Further childcare information can be found here:

<https://www.childcare.admin.cam.ac.uk/>

The Newcomers and Visiting Scholars Group is an organisation within the University run by volunteers whose aim is to help newly arrived wives, husbands, partners and families of Visiting Scholars and members of the University to settle in Cambridge and give them an opportunity to meet local people. The Office of Postdoctoral Affairs supports the postdoctoral community within Cambridge. Further details are available here: <https://www.opda.cam.ac.uk/>

## Your wellbeing

The University's Sport Centre, Counselling Services and Occupational Health are just some of the support services available to University employees to promote their physical and mental wellbeing. There are many societies in Cambridge catering for almost every taste and interest. Whether you want to take part in a sport, participate in music or drama, pursue a hobby, or join a political group, you will almost certainly find that a society exists for this purpose. The University also hosts the [Cambridge Science Festival](#) and [Cambridge Festival of Ideas](#), as well as [Open Cambridge](#) weekend, which together attract over 50,000 visitors per year. The festivals are a great opportunity to get your first taste of public engagement, through volunteering, supporting hands-on activities or proposing a talk.

## Development opportunities

We support new employees to settle in through various activities. The encouragement of career development for all staff is one of the University's values and we put this into practice through various services and initiatives. Our Personal and Professional Development Department provides development opportunities and courses for all University employees. These include face-to-face sessions, online learning modules and webinars. Employees may also apply for financial support to undertake training that will lead to a qualification. We offer reduced staff fees for University of Cambridge graduate courses and the opportunity to attend lectures and seminars held by University departments and institutions. The CareerStart@Cam programme also supports employees in assistant staff roles who do not hold higher education qualifications to develop their skills, experience and qualifications.





# How to apply

Applications should be submitted online via the University of Cambridge jobs page [www.jobs.cam.ac.uk](http://www.jobs.cam.ac.uk) by clicking “Apply online” in the job advert. You will need an email address to register for our online system.

Conversations about flexible working are encouraged at the University of Cambridge. Please feel free to discuss flexibility prior to applying (using the contact information below) or at interview if your application is successful.

Informal enquiries are welcomed and should be directed to our Human Resources team:

**Email:** [Recruitment@cisl.cam.ac.uk](mailto:Recruitment@cisl.cam.ac.uk)

The closing date for applications is: **12<sup>th</sup> May 2024**