

Job Detail

(Overview, Role Detail and Person Specification)

Directorate of Student Success,
Administration and Support Service

Student Administration

CRM Configurator– Grade 7

(Ref: 50053317)

Role Title: CRM Configurator

Reports to: CRM Manager

Overview

Student Administration

Student Administration is part of the wider Directorate of Student Success, Administration and Support Service (DSSAS) which unites the Library, Student Experience, Student Administration and School Operations as one team.

The Student Administration Team is responsible for managing the customer service, data, systems and processes which support the student experience from the point of admission onwards. It also manages statutory student returns and management information on all our students. The Service is comprised of six teams: Admissions, Customer Services, Data and Systems, Analysis and Information, UKVI Compliance and Timetabling and Examinations.

The CRM team are responsible for the development, implementation and continuous improvement of the University's Microsoft Dynamics 365 system. They ensure that the CRM data is of excellent quality, accurate and available on a timely basis. The team also ensure that the University's data and student journey and experience requirements are met, through identification of more streamlined and effective processes and developing a culture of continuous improvement.

CRM within the University

Over the last 3 years the university has invested significantly in a new CRM. To date the system has delivered significant business benefits to the university with respect to Recruitment & Admissions business processes. Our development methodology has been agile and we have consistently delivered in 3 week sprint cycles since the first deliverables went live in November 2019.

The vision is to create a single 360 degree view of a student's interactions with the university be those interactions in person, by telephone through email or social media contact. Additional investment has been secured to integrate CRM with state-of-the-art telephony systems and we are working to integrate CRM with other channels such as Virtual Agents/Chatbot tools.

The vision for CRM within the university is that drives and enables innovation in our customer experienced and will ultimately provide a service differential to our students and other stakeholders.

Role Purpose

Working closely with the CRM Manager and other members of the team, the CRM Configurator will support the management and development of the University's CRM system (Microsoft D365), making CRM changes utilising the standard configuration tools in the CRM.

Located in the CRM team the CRM Configurator will be responsible for conducting hands-on configuration, customisation and extensions of the Microsoft Dynamics 365 CRM. They will have prior experience of the configuration of out of the box CRM features including, entities, fields, forms, views, visualizations, relationships, mobile, workflow and processes; along with experience of configuring features including auditing, document management, templates, administration settings, data management, user management, security, themes and email.

The CRM Configurator will be able to demonstrate excellent problem-solving and analytical skills along with the ability to approach and resolve problems in a prompt, practical and efficient manner. With excellent team working skills, a deep commitment to service excellence and the capacity to work flexibly and effectively with key stakeholders they will be able to use their experience with D365 to contribute to the development of a progressive, innovative and strategic vision for the University's CRM, and apply best practice to achieve outstanding results for the University and its students. The role holder will be able to identify and mitigate technical risks, follow technical direction, challenge where appropriate and provide solutions to business requirements.

Responsibilities

- To work with relevant stakeholders and lead the configuration and customisation of the CRM, including but not limited to:
 - Solution Assessment and design working with Product owners to validate and shape solution
 - User interface design including form extensions and changes.
 - Migration of data using MS Dynamics data import functionality
 - Creating and amending MS Dynamics reporting dashboards
 - Automation using Power Automate tools
 - Supporting with Business readiness, User Acceptance Testing, launch and adoption.
- Configuration of the out of the box CRM features including, tables, columns, forms, views, visualizations, relationships, mobile, workflow and processes
- Configuration of CRM features including auditing, document management, templates, administration settings, data management, user management, security, themes and email
- Manage the design and development of D365 solutions to business requirements
- To act as second line support for CRM related business and technical issues. Ensuring resolution within agreed service levels.
- To be a primary point of contact, engaging and consulting with the University customer and user community, including academic and professional service colleagues at all levels and, using your experience of D365, find solutions to business requirements and to facilitate changes and improvements
- To analyse and investigate the impact of business requirements and change requests on system configuration, functionality, data structures and interfaces
- To support new projects as part of the CRM roadmap, and the delivery of-business improvement projects to agreed quality, time and budget standards to sustain the successful utilisation and exploitation of the CRM system at Salford
- To maintain an up-to-date knowledge of systems used, future developments, and ensure that new functionality is utilised where appropriate
- Continuous self-evaluation of personal performance

- Support and deputise for team colleagues as required
- Perform any other duties appropriate to the grade as may be required by the CRM Manager
- Comply with the personal health and safety responsibilities specified in the University Health and Safety policy
- Engage with the University's commitment to put our students first and deliver services which are customer orientated, represent value for money and contribute to the financial and environmental sustainability of the University when undertaking all duties and aspects of the role
- Promote equality and diversity for students and staff and sustain an inclusive and supportive study and work environment in accordance with University policy
- This role detail is a guide to the work you will initially be required to undertake. It may be changed from time to time to meet changing circumstances. It does not form part of your Contract of Employment.

Person Specification

Qualifications

	The successful candidate should have:	Essential/ Desirable	Tested by* I, A, P
1	Graduate qualification or equivalent professional experience	Essential	A, I
2	Commitment to continuing professional development	Essential	A, I

Background & Experience

	The successful candidate should have:	Essential/ Desirable	Tested by* I, A, P
3	Demonstrable experience of Microsoft Dynamics 365/Power Platform configuration	Essential	A, I
4	Experience of conducting hands-on configuration, customisation and extensions of Microsoft D365	Essential	A, I
5	Experience with configuration of OOB CRM features including, entities, fields, forms, views, visualizations, relationships, mobile, workflow and processes	Essential	A, I
6	Experience configuring OOB CRM features including auditing, document management, templates, administration settings, data management, user management, security, themes and email	Essential	A, I
7	Experience of managing the design and development of D365 solutions to meet business requirements and support business change	Essential	A, I
8	Experience building and delivering technology in a Higher Education environment	Desirable	A, I
9	Experience of developing within the wider Microsoft toolkit including Microsoft Office 365, Power BI, Power Automate, and working with Microsoft identity for authentication and authorisation	Desirable	A, I
10	Full solution life-cycle experience of Microsoft Dynamics and Power Platform from conception, solution architecture, design through test and deployment	Desirable	A, I

Knowledge

	The successful candidate should have demonstrable knowledge of:	Essential/ Desirable	Tested by* I, A, P
11	Understanding the value of data governance and the importance of data cleansing in an IT enabled business system.	Essential	A, I
12	A functional working knowledge of Microsoft D365	Essential	A, I
13	A thorough understanding and experience of identification and mitigation of technical risks	Essential	A, I
14	A thorough understanding and experience of implementing change to software systems and interfaces	Essential	A, I
15	The structure, processes and organisation of Higher Education institutions and their core activities	Desirable	A, I
16	Detailed understanding of the Microsoft Dynamics database schema and business data model (Dataverse), configuration and customization where required and in a maintainable manner	Desirable	A, I

Skills & Competencies

	The successful candidate should demonstrate:	Essential/ Desirable	Tested by* I, A, P
17	Ability to work in a team and follow technical direction and challenge where appropriate; be self-motivated, adaptable and flexible	Essential	A, I
18	The ability to identify and mitigate technical risks	Essential	A, I
19	Strong communication, relationship building and networking skills ability to deal with a wide-ranging internal client base	Essential	A, I
20	Ability to write in a clear and concise manner and record information accurately and to deliver consistent high-quality work at a detailed level	Essential	A, I
21	Excellent evaluation, organisation, decision making and time management skills with the ability to work to deadlines	Essential	A, I
22	Excellent problem-solving and analytical skills with the ability to approach and resolve problems in a fast-paced environment	Essential	A, I
23	A demonstrable record of applying best practice and a customer centred approach to the work of an organisation to achieve outstanding results	Essential	A, I
24	Ability to contribute to the development of a progressive, innovative and strategic vision for the Directorate in support of the aims and activities of the University	Essential	A, I

A = Application form, I = Interview, P = Presentation, T = Test

Details of any assessments required will be provided in the invitation to interview letter.

- Appointments to grades 1 to 6 will normally include a competency based interview and work based simulation exercise
- Appointments to grade 7 and above will normally include a competency based interview and presentation and in some instances a work based simulation exercise.

Candidate guidance

You should provide a supporting statement to describe how your skills and experience match the criteria listed in the person specification. You should provide narrative to each of the key sections (Background & Experience, Knowledge and Skills & Competencies).

Strong applications will demonstrate experience relevant to the **essential** and **desirable** criteria. You should aim to be as **concise and succinct** as possible when providing your narrative, as this will greatly assist the shortlisting panel in reviewing your application.