



Job Description

Role Title	Senior CRM Product Manager
Job Family & Category	Technical Specialists – Senior Technical Specialist
Team	Digital Delivery
Line Manager	Group Head of Digital
New/ Existing Role	New
Perm/ Fixed Term	Permanent
Resource and Management Responsibilities	<ul style="list-style-type: none"> ▪ Budgets as agreed each financial year ▪ People Responsibilities: circa 6 ▪ Contractor Responsibilities: As agreed
Job purpose	Lead the management of our CRM application estate at Energy Saving Trust ensuring the business has CRM systems that are secure, resilient, scalable, and put the customer experience first..
Key responsibilities	<ul style="list-style-type: none"> • Own, Develop and Manage our CRM strategy, including on-prem and Cloud CRM systems. • Lead on system integration efforts with other business applications and third party solutions. • Lead the planning and execution of a comprehensive CRM reimplementation project. • CRM roadmap development. Develop and maintain a clear CRM roadmap which aligns with business goals and objectives. • Work closely with internal stakeholders to ensure CRM systems meet user requirements. • Manage internal technical and non-technical stakeholder communication. • Regularly assess changing needs, research technology trends, and evaluate suppliers. • Foster relationships with third-party suppliers to guarantee service quality and manage issue resolution.

Impact description

Within one month, you will:

- Understand current CRM systems at Energy Saving Trust.
- Carried out initial stakeholder inductions to understand current CRM requirements and challenges
- Developed a high level plan for the discovery phase of the CRM programme.

Within three months, you will:

- Defined the vision for the future of CRM at Energy Saving Trust.
- Developed a CRM roadmap, taking into account ongoing BAU improvements alongside the wider CRM programme.
- Understood CRM integrations and related dependencies.
- Assessed external CRM landscape and identified considerations and options for our CRM technology selection process

Within six months, you will:

- With programme team, completed discovery process.
- Supported in the development of a draft business case for the CRM programme
- Identified clear, measurable business benefits in line with the future vision for CRM.

**Knowledge, skills
and qualifications
required**

Essential:

- Significant experience in CRM product capabilities which should include either Salesforce or MS Dynamics 365 and the wider Microsoft 365 product suite.
- Stakeholder management, confident communicator at all levels.
- Experience with project management methodologies, including Agile.
- Experience of user story creation, creating well defined user stories, epics and acceptance criteria.
- Proven experience with CRM administration and customisation.
- Self motivated and adaptable, able to manage in a fast-paced and dynamic environment.

Desirable:

- Understanding of sustainability and net zero agenda, and market developments