

Job Description

Role Title:	CRM Configurator
Dept:	Student Experience and Support
Reference:	MPF3126
Grade:	7
Full or Part time:	Full time
Hours:	1.0 FTE
Reports to:	Head of Customer Contact Technology

Role Purpose

Working closely with members of the team, the CRM Configurator will support the management and development of the University's CRM system (Microsoft D365), making base CRM changes utilising the standard configuration tools in the CRM. To CRM Configurator will work with the 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
- Migration of data
- Workflow and reporting
- Supporting with Business readiness, User Acceptance Testing, launch and adoption.

Located in the Customer Contact Technologies 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 it's 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.

Principal Duties & 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
 - Migration of data
 - Workflow and reporting
 - Supporting with Business readiness, User Acceptance Testing, launch and adoption.
- Configuration of the out of the box CRM features including, entities, fields, forms, views, visualizations, relationships, mobile, workflow and processes
- Configuration of out of the box 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 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

Generic Duties

- Perform any other duties appropriate to the grade as may be required by the Head of School/Head of Division etc.
- Comply with the personal health and safety responsibilities specified in the University Health and Safety policy.
- To 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.
- Advance equality, support our work towards eliminating unlawful discrimination, foster an inclusive study and work environment for students, staff and visitors in accordance with our public sector equality duties and 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 follows on next page

Person Specification

The successful candidate should demonstrate the following, which are 'Essential' (E) or 'Desirable' (D)

Qualifications

1. Graduate qualification or equivalent professional experience (E)
2. Commitment to continuing professional development (E)

Background and Experience

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

Knowledge

11. Understanding the value of data governance and the importance of data cleansing in an IT enabled business system (E)
12. A functional working knowledge of Microsoft D365 (E)
13. A thorough understanding and experience of identification and mitigation of technical risks (E)
14. A thorough understanding and experience of implementing change to software systems and interfaces (E)
15. The structure, processes and organisation of Higher Education institutions and their core activities (D)

16. Detailed understanding of the Microsoft Dynamics database schema and business data model (Data Verse), configuration and customization where required and in a maintainable manner (D)

Skills and Competencies

17. Ability to work in a team and follow technical direction and challenge where appropriate; be self-motivated, adaptable and flexible (E)
18. The ability to identify and mitigate technical risks (E)
19. Strong communication, relationship building and networking skills ability to deal with a wide-ranging internal client base (E)
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 (E)
21. Excellent evaluation, organisation, decision making and time management skills with the ability to work to deadlines (E)
22. Excellent problem-solving and analytical skills with the ability to approach and resolve problems in a fast-paced environment (E)
23. A demonstrable record of applying best practice and a customer centred approach to the work of an organisation to achieve outstanding results (E)
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 (E)