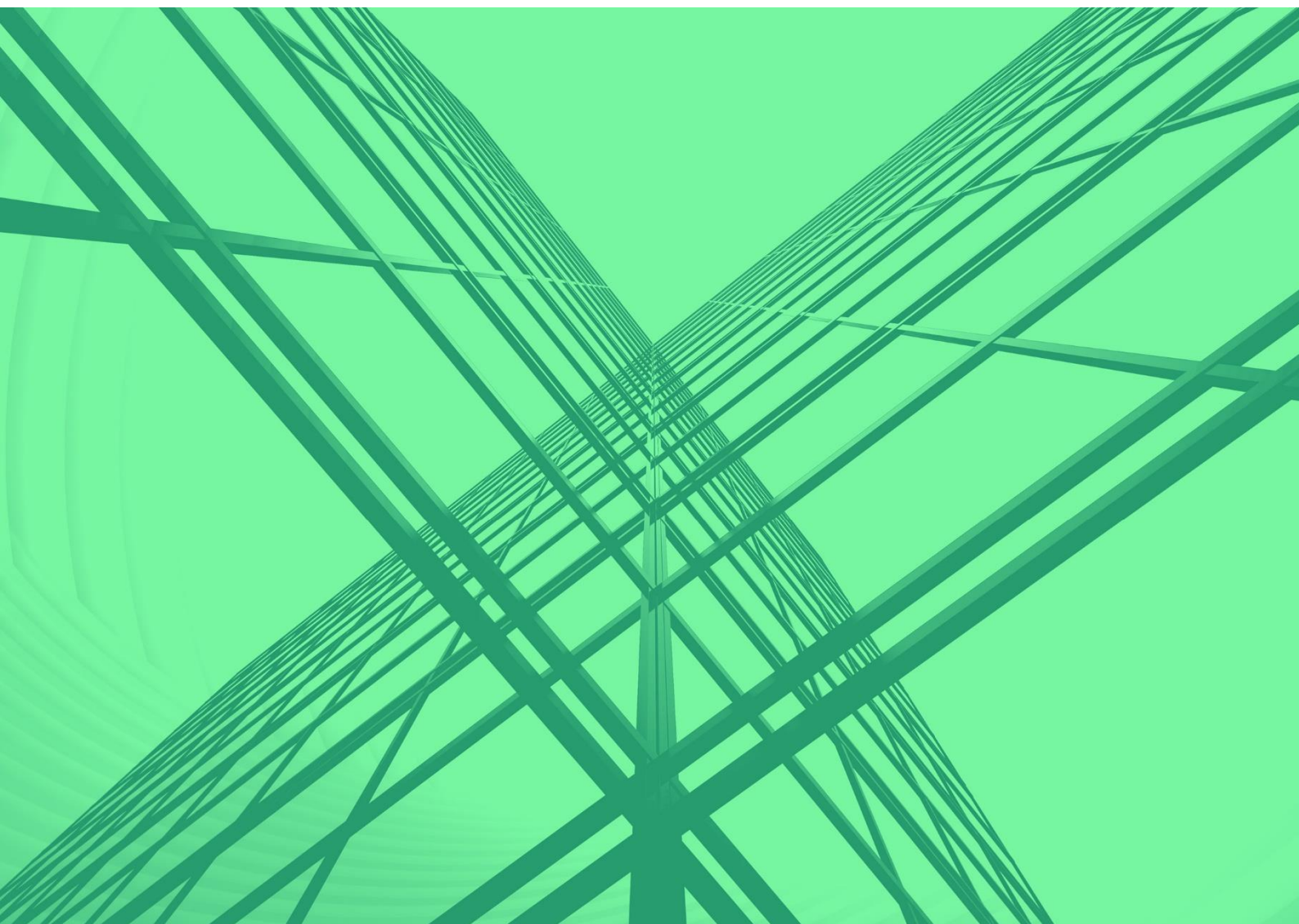


CRM Project Manager

CANDIDATE PACK

Full time

35 hours per week

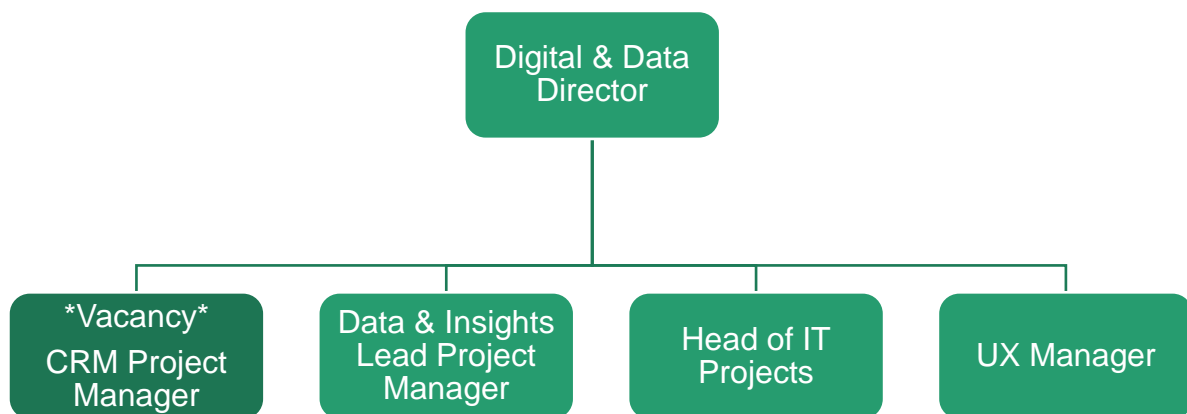


The Digital Transformation team

Our Digital Transformation team are a team of five that report directly into the CEO. The Digital and Data Director oversees the entire team and the Digital Transformation programme which has now been running for the past three years.

Since the programme started, the team in conjunction with the rest of the Institution, have invested in a user research project to devise and develop member personas and used these to inform the design of a new corporate identity and the development of a new website.

This contributes to the Institution's transformation vision, which puts the professional competence of our members at the heart of everything we do, and to unify user experience. With the result being to raise the profile of structural engineering across the globe, and show us as an expert, accessible and inclusive Institution.



The CRM project is a key opportunity to move the Institution's business transformation programme forward and change the way we service the membership and users, permitting greater freedom for engagement through world class online access.

A new CRM will be implemented with improved workflows and data architecture to become the central system which will support many of our processes and staff. It will enable the Institution to develop with the times, as the ambition is to grow and engage with international audiences, gain maximum insight from members' data and become smarter about member engagement.

As CRM Project Manager, your expert contribution will result in the successful end to end delivery of the new system. You will be instrumental in addressing the key challenges we face; helping the Institution move away from labour intensive and paper-based processes, siloed data and fragmented system integration.

Why work for the Institution?

Working for the Institution of Structural Engineers is an opportunity to learn, develop and make a difference.

Join our team of approximately 65 employees and help support our vision to lead, support and nurture the development of structural engineering worldwide.

Our head office is only a short walk from Barbican, Old Street and Farringdon. It's bright, modern and open plan, supporting a collaborative and friendly environment.

We pride ourselves on the flexibility we can provide to our staff and offer a wide variety of benefits to enhance your work life balance and wellbeing as detailed later in this pack.

To thrive with us, bring:

- An open-minded and flexible approach. Enhance our diverse and inclusive team.
- A creative attitude to work. Help us strengthen and improve in a workplace where you are encouraged to innovate and share new ideas.
- Enthusiasm and commitment. Provide our members with the best service possible to maintain our worldwide respected status.
- A friendly and communicative approach. Fit in to our small organisation where staff know each other well and strive to work collaboratively.
- The ambition to take on new challenges. We always look to the future to embrace change, so we continue to evolve.

For more information, please read on :

Full job description and person specification pages 4-8

Salary and package details page 9

How to apply page 10

More about us :

Our organisation, governance and values page 11

Organisational Structure page 12

Job description and person specification

1. Job details

Job title:	CRM Project Manager (fixed-term contract)
Reports to:	Digital & Data Director
Responsible for:	No direct reports; but there is an expectation to indirectly manage and professionally lead an external project team
Date:	February 2020
Location:	The Institution's HQ, London or elsewhere as reasonably required.

2. Job purpose

To manage the successful end to end delivery of a new CRM system including time, cost, quality and benefits.

To lead and facilitate the scoping, design and development of high profile, business critical and complex technical projects involving large volume, sensitive data and systems integration.

To directly and indirectly manage team members to support them to achieve required tasks on time and at the required standard, providing professional leadership to and working in partnership with technical, data and subject experts.

To provide effective stakeholder engagement and change management throughout the organisation.

To provide direction, support and management of external suppliers.

To continuously manage and monitor budget, progress, risks and issues and manage exceptions and changes in the project.

3. Role and responsibilities

Business transformation

1. Be a key member of the Digital Transformation team and consistently support the vision and ambition of the strategic programme of change.
2. Find solutions that will secure the longevity of the chosen CRM platform, the digitisation and enhancement of services available to all members and the reduction of operational inefficiencies.
3. Support the build of a safe, cost-effective, flexible infrastructure that adapts to the needs of future members and users.
4. Set project management standards and processes across the organisation's change management function.

CRM development

5. Review and, where needed, map out business processes including member/customer data, sales and commercial data, finance data, membership lifecycle and customer management, marketing data, to ensure the right fit/build of new software to suit the Institution's requirements.
6. Work closely with the Data & Insights Lead to ensure all relevant data is migrated into the new CRM from various current software platforms and key systems.
7. Promote the use of the chosen CRM to all internal stakeholders and become a super-user and 'go-to' point for all CRM project queries.
8. Work closely with the Head of IT Projects to share technical and integration responsibilities to make complex configuration changes to support business processes.
9. Analyse, configure, test and implement the CRM.
10. Manage the project in a phased and flexible way to incorporate changes, new releases, updates and enhancements, collaborating with the CRM developers and relevant internal stakeholders.
11. Develop a change management process for the new CRM system for future enhancements, post go-live.
12. Manage the provision of system training to ensure all users are confident in using the new CRM and that the Institution's processes are correctly followed.
13. Work closely with the Data & Insights Lead to share responsibilities to develop reporting tools to ensure quality of data and insights with visuals/dashboards for campaign performance.

Project Management & reporting

14. Initiate, plan, lead and estimate the CRM project and all the workstreams associated with it, ensuring they are well managed and financially sound.
15. Manage the procurement processes for external resources and suppliers to bring in expert project support when needed.
16. Lead the creation and implementation of change management and communication plans required by the programme.
17. Assemble appropriate project teams, define roles and responsibilities, book colleagues' time to capture internal requirements or feedback, maximise stakeholders' contribution and identify relevant resources while paying great consideration to the concurrent business-as-usual initiatives.
18. Report to the Data & Digital Director on project progress and, when appropriate, submit regular reports to the Transformation Board, the Executive Leadership or Senior Management team.
19. Be responsible for regular project reviews, their evaluation and follow up with learnings sessions to instil a culture of sharing insights across the Institution.

20. Implement agile project management and a collaborative culture by adopting innovative ways of working to encourage and value commitment, focus, openness and respect.

Stakeholder relationship management

21. Develop an engagement plan for different streams of activities, for both internal and external stakeholders, ensuring meaningful and effective relationships are built and maintained.
22. Oversee the activities associated to the CRM project and maximise the contribution from the Data & Insights Lead, IT lead, project team members (internal and external) and external suppliers, ensuring the project is delivered on time, on budget and challenges are addressed as soon as they arise.
23. Produce compelling documentation, scope and deliver discovery work, working with external suppliers and internal stakeholders, for any activities associated with the CRM development project.
24. Conduct requirement gathering exercises to capture the changing needs of the business, make recommendations on design and structural changes, training and onboarding, testing and quality assurance to the Digital & Data Director and relevant departmental leads.
25. Design and lead relevant workshops and meetings with internal and external people, up to Executive Leadership team level.

4. General responsibilities

1. Work collaboratively with the Digital & Data Director and the wider project team.
2. Make suggestions for improving processes, systems etc. which support the efficiency and stability of the Institution. As directed, contribute to income generating activities on behalf of the Institution, fully mobilising your expertise to the commercial benefit of the Institution.
3. Comply with all Institution Policy and Procedures.
4. Support the Institution in the delivery of its mission, vision and values.
5. Any other reasonable ad hoc duties as requested.

5. Communications and working relationships

1. All employees of the Institution including Senior Management and other Heads of Department.
2. The Membership, where relevant.
3. External agencies, suppliers, consultants and external bodies.

6. Knowledge, skills and experience required

Criteria	Essential/Desirable
<u>Qualifications and Knowledge</u>	
Educated to degree level or equivalent in relevant business field	E
Demonstrable knowledge and experience in delivering, managing, implementing and training on CRM software	E
Strong understanding of data and technical requirements, to ensure smooth data migration and mapping of business processes to the new system	E
Proven knowledge and appreciation of data architecture, data segmentation, list management, GDPR compliance	E
Hold a Project Management qualification, ideally in Agile or Waterfall methodologies	E
<u>Skills</u>	
Excellent organisational skills, able to work independently with minimal supervision and with a systemised/methodical approach to managing multi-stream workload with the ability to work under pressure to meet tight deadlines	E
Excellent written and oral communication skills with the ability to present and explain detailed information clearly and succinctly	E
Excellent interpersonal skills with the ability to build rapport and influence colleagues and stakeholders, at all levels	E
Attention to detail, accuracy and ability to check detailed information, able to critique own work and the work of others	E
Flexible and resourceful and able to manage and work in a small team and collaborative to work with other departments and other parties	E
IT Skills:	
Microsoft Office 365 suite of applications and services to intermediate/advanced standard	E
Advanced IT skills in relation to project management tools and techniques	E
Advanced knowledge of relational databases	D
<u>Experience</u>	
Successfully delivered the design, development and integration of a CRM or membership system project on multiple occasions	E
Successfully managed the effective governance of a complex technical/data project with senior stakeholder's management	E
Management of project teams to ensure delivery of project outcomes	E

Criteria	Essential/Desirable
Reporting on/being accountable for managing expectations for project deliverables, stakeholder communications, appropriate evaluation of progress, quality, cost activities, risk register and escalation procedures	E
Experience of working in a charity/not-for-profit or membership organisation	D

This job description does not form part of the contract of employment and may be subject to change.

Salary and package details

Salary: £50,000 - £55,000 per annum subject to experience

Contract: Fixed term – 24 months
Full time – 35 hours a week within a flexi-time system

Benefits: The Institution offers a range of non-contractual discretionary benefits including:

From the join date:

- 23 days annual leave per annum plus bank holidays
- Flexible working system whereby additional hours worked may be accrued and taken as flexi-leave
- Life Insurance – death benefit subject to scheme eligibility rules

From the successful completion of the probation period, whilst provided at the Institution's discretion, may be subject to scheme eligibility rules:

- Participate in the Institution's pension plan arrangements
- Private Medical Insurance
- Health Cash Plan
- Permanent Health Insurance
- Season Ticket Loan
- Reimbursement of one membership subscription to an agreed appropriate professional association, including this Institution.

The Institution reserves the right to exercise its discretion to amend or withdraw any or all of the above benefits.

How to apply; the recruitment process

Applicants should submit their up to date CV demonstrating how they meet the knowledge, skills and experience required for the role as depicted in the job description.

All applications should be submitted through [Webrecruit](#).

On receipt, your application will be sifted by the recruitment panel and assessed against the criteria for the role. All successfully shortlisted candidates will be contacted by telephone and invited for interview. We reserve the right to close or extend this position depending on application numbers. Therefore, we would urge candidates to apply as soon as possible.

If you have not heard from the Institution within two weeks of your application, it is with regret that you have been unsuccessful on this occasion. Due to the volume of applications we receive we cannot write to all applicants.

Applicants must possess a current right to work in the UK.

The selection process will consist of a face to face interview with the Digital & Data Director, Head of IT Projects and Data & Insights Lead Project Manager. The interview will comprise of competency questions designed to test your skills and experience required for this role. It also gives you the opportunity to ask any questions you may have about the role, the team or the Institution.

Applicants will be asked to specify whether there are any reasonable adjustments needed for them to participate in a selection process. Wherever possible and reasonable, we will meet any declared needs.

Candidate who are successful at the first stage will be invited to a second interview, comprising of an assessment and meeting with an external supplier.

The Institution of Structural Engineers

With over 31,000 members working in 115 countries, we are the world's largest membership organisation dedicated to the art and science of structural engineering.

The Institution is an internationally recognised source of expertise and information concerning all issues that involve structural engineering and public safety within the built environment.

The core work of the Institution is to support and protect the profession by upholding professional standards and acting as an international voice on behalf of structural engineers.

Governance

The Institution of Structural Engineers is governed under its Royal Charter, bye-laws and the applicable regulations.

The Institution Council consists of the President, Vice-Presidents, past Presidents, representatives of regional groups and members who are elected for a period of three years. The Institution is supported by an executive of 65 staff. The Board is the governing body of the Institution. Its members are the Institution's Trustees.

Our values

We strive towards a structural engineering profession that is built on competence, accessibility, and community.

Competence

Championing competence is at the core of everything we do.

We offer a wide range of opportunities for our members to develop, refresh and extend personal competencies. We also help members specialise by offering tailored courses, resources and specialist qualifications.

Accessibility and diversity

We are committed to making the structural engineering profession more accessible. We are constantly reviewing our routes to membership to provide flexibility in the process, offering more choice for all our candidates.

We value diversity and the perspectives people from different backgrounds bring to the engineering profession. We work with other professional bodies and our members to identify and remove barriers to anyone becoming a structural engineer.

Community

We work to create an international community of structural engineering excellence, facilitated by our digital platforms, Regional Group activity and networks of special interest.

For more detailed information about the Institution please visit our [website](#).

Organisational Structure

