



The
countryside
charity

Dynamics 365 CRM Administrator

Department: Finance and Operational Effectiveness

Location: Office based but ability to work 2-3 days from home

Reporting to: Knowledge and Data Manager

Responsible for: n/a

Job summary - the big picture

Support the development of and responsible for the administration of Dynamics 365 CRM, configuration, customisation and integration of solutions and apps with other IT systems.

Key people – who you will be working with

- Internally – colleagues across departments and within own team
- Network – CPRE local group staff and volunteers
- Externally – stakeholders including suppliers, external consultants, agencies and other organisations

Main areas of responsibility - the day-to-day work

- Work with colleagues and our external delivery partners to develop and deliver a new Dynamics CRM solution for CPRE, that meets the requirements of the organisation.
- To be the system administrator of Dynamics 365 CRM within the Knowledge and Data team, managing business expectations and liaising with stakeholders to manage changes in line with appropriate controls.
- Develop, configure, customise and maintain the CRM system, solutions, apps and integrations. Documenting the critical processes and training stakeholders on how to use the CRM.
- Be responsible for providing adequate and timely data selections, uploads, extractions and reports and champion effective use of data accuracy and lead in making others more data literate and able to access information.
- Providing recommendation and enhancing CRM capabilities, through communication with key stakeholders.
- Supporting volunteers and the network with CRM related tasks.

Selection criteria – what you need to do the job

- Experience administering a Dynamics 365 CRM system, with Customer Engagement applications
- Experience in implementing changes to CRM front end through customising and configuration



- Experience with D365 Dataverse, Power Platform, PowerApps (model driven and canvas), automating business processes with Power Automate
- Strong data quality and management skills, to ensure data integrity, carrying out data cleaning, improvements and de-duplication and understand, report and seek to rectify data quality issues.
- Good understanding of CRM reporting with Power BI to create dashboards/views/reports to meet business requirements
- Experience with modifying and maintaining system customisation to business processes, workflows, and dialogs; templates; lead nurtures and email sends; fields and forms; among other possible customisations.
- Experience serving in a primary support role for a Microsoft Dynamics environment to include system backup, maintenance, patch updates, error logs, and release management.
- Good working knowledge of SQL server and ability to query in SQL
- Provided user support as necessary within an organisation, and acted as first line support and point of escalation for support team.
- Assist with user documentation and troubleshooting of technical issues with the platform.
- Been involved in supporting a user training programme - to enable other colleagues to support and learn how best to use the system.
- Knowledge of how to manage and maintain user permissions, security roles and security teams.
- Strong interpersonal skills and ability to be able to work comfortably with both technical and non-technical stakeholders
- Ability to respond in a flexible and adaptive manner to support business requirements, when ad hoc requests are made.

How you will be supported – by CPRE and others

- Your line manager will meet you regularly to ensure you have the support you need day-to-day and more broadly throughout the year. They will set clear tasks and provide you with the information and support you need to complete them.
- Your line manager will take responsibility for your development through learning, networking, appraisal and other opportunities for growth.

Career progression

- To support your career progression, you will be able to work with some of the newest Microsoft data technologies such as Power Platform, Power Automate, Power Virtual Agents, Power Apps, and Azure.