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Job and person specification: CRM Data & Insights Analyst

Department: Finance, People & Performance

Location: National CPRE, London N1

Reporting to: Data & Insights Manager

Responsible for: N/A

Job summary - the big picture

To assist in supporting our CPRE national charity with maintenance of the CRM data and providing data analysis and insights using Microsoft applications.

Scope

- Will make recommendations but also some low-risk decisions, getting the sign-off for higher risk ones
- Will influence own team at a low level

Key people – who you will be working with

- Internally – own team and other teams within own area
- Networks – county branches and volunteers
- External - stakeholders including suppliers and companies

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

- **CRM and Database Administration:** Assist with the daily management and administration of Dynamics CRM and integrations with other systems, supporting CPRE's fundraising, supporter care, and campaigning activities.
- **Data Integrity and Management:** Ensure data accuracy through regular data cleaning, improvements, and de-duplication processes.
- **Data Selections and Visualisation:** Provide timely and accurate data selections and create visual reports to support various organisational needs.
- **Data Uploads and Extractions:** Handle data uploads to and extractions from the database, ensuring seamless data flow.



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- **Statistical Analysis:** Use statistical tools to analyse data, interpreting and understanding the numbers within the models.
- **Value Extraction from Data Sets:** Collaborate to identify correlations in customer behaviours and giving propensities, leveraging both internal and external data sets.
- **Role Modelling Values:** Exemplify CPRE's values (Open, Trusted, Connected, Inspirational) and behaviours in all tasks and interactions.
- **Proactive Professional Development:** Take charge of personal growth through continuous learning, networking, self-assessment, and seeking opportunities for improvement.
- **Team Support & training:** Provide support to team colleagues as directed and assist other teams as needed.

Selection criteria – what you need to do the job

- Will have a Mathematical degree 2.1 or above. If you do not have a Mathematics degree, we are open to other STEM disciplines, subject to demonstrating a solid numerical academic background, which is essential for this role
- Experience of using a Customer Relationship Management System or similar system e.g. Dynamics / Salesforce
- Will have knowledge of:
 - Mathematical programming
 - Intermediate level of IT skills e.g. Excel e.g. Vlookup, pivot tables
- Will have an understanding of the structure and querying of databases ideally SQL and have experience of data visualisation tools e.g. tableau or Power BI
- Can demonstrate an ability to analyse data and use additional research to gain key insights that can be used for business decisions. Demonstrable ability to combine analytical thinking based on numbers, together with common sense and imagination
- Strong communication and interpersonal skills. Being able to explain technical information clearly to non-technical colleagues. An active contributor, sharing knowledge and expertise
- Will be a team player and able to take responsibility for your own work but also have the ability to work independently. Commitment to meet deadlines and commitments, for self and team
- Will have the ability to recognise when there is a need for change or improvement and adapt quickly. A continuous improver, always looking to learn, evaluate and improve systems and procedures, with a willingness to dive into detail