



Job Title: **Senior CRM and Data Insights Executive**

Dept: **Charity**

	Essential/Desirable	Evidence
A: EDUCATION QUALIFICATIONS AND TRAINING Level of education, specific qualifications, specialised training, training requirements for the job)	Essential <ul style="list-style-type: none"> GCSEs (Level 4/C - Maths and English) equivalent qualifications or relevant experience which demonstrates equivalent academic skills. Desirable <ul style="list-style-type: none"> Data Science Information Management Business Information Systems Computer Science Statistics or Mathematics 	Application Form Certificates Interview
B: EXPERIENCE (Length, type and level of work-related experience)	Essential <ul style="list-style-type: none"> Significant hands-on experience managing and optimising a CRM system (e.g. Access CRM, Donorfy, Salesforce, Raiser's Edge) ideally in a fundraising, marketing, sales, or engagement context. Proven ability to maintain accurate data through imports, exports, deduplication, coding and data protection management. Strong understanding of supporter data structures and how to segment and prepare data for campaigns and reporting. Confident user of Excel and reporting/BI tools such as Power BI, FastStats, or similar. Sound knowledge of data protection legislation (GDPR) and its practical application Experience creating and maintaining standard operating procedures (SOPs) 	Application Form Interview CPD



	<p>and documented processes for CRM and data workflows.</p> <ul style="list-style-type: none"> • Experience creating and maintaining standard operating procedures (SOPs) and documented processes for CRM and data workflows. • Highly organised, analytical, and capable of managing competing priorities in a fast-paced environment. <p>Desirable</p> <ul style="list-style-type: none"> • Experience integrating CRM systems with digital platforms and tools (e.g. Dotdigital, Mailchimp). • Previous involvement in CRM development or data migration projects. • Knowledge of Gift Aid, Charity Commission and Fundraising Code would be advantageous. 	
<p>C: SKILLS KNOWLEDGE ABILITIES (Range and level of skills, depth of knowledge required for the job)</p>	<ul style="list-style-type: none"> • Good communication skills, both verbal and written. • Strong attention to detail with the ability to maintain data accuracy and integrity across large, complex datasets. • Able to interpret and communicate data insights to non-technical audiences in a clear and actionable way. • Committed to continuous improvement and embedding a culture of data-informed decision-making. • Good interpersonal and team working skills, with an ability to work independently. • Highly organised, with the ability to prioritise workload, manage competing demands, and meet deadlines. • Able to act as an ambassador for the overall work of the charity. 	<p>Application Form</p> <p>Interview</p> <p>References</p> <p>CPD</p>



<p>D: APTITUDES AND ATTRIBUTES (Communication and interpersonal skills, organisational skills, ability to work on own initiative, to strict protocols/procedures and time scales)</p>	<p>Highly motivated and enthusiastic.</p> <ul style="list-style-type: none"> • Good interpersonal skills. • Team player. • Flexible. • Dependable. • Attention to detail. • Prioritise workloads. • Data and development focused. 	<p>Interview</p> <p>References</p>
<p>E: OTHER JOB REQUIREMENTS (Physical/health requirements, specific requirements e.g. car owner/driver, full, clean, current UK Driving Licence)</p>	<p>Essential</p> <ul style="list-style-type: none"> • Basic DBS check. • Driving license and have access to a car 	<p>Application form</p> <p>References</p> <p>DBS checking service</p> <p>Driving Licence check</p>
<p>F: PERSONAL QUALITIES AND VALUES</p>	<ul style="list-style-type: none"> • RECEPTIVE - We define success as continuous improvement and aim for excellence in our lifesaving services and community projects • RESPECTFUL - we are a community-based organisation with a 'one team' culture that embraces and encourages honesty. • RESPONSIBLE - we aim to create the best possible future for everyone and strive to place sustainability at the heart of everything we do. • RELEVANT - we are open to new ideas and ways of working, across our clinical and charity operations, providing total transparency to all stakeholders. • RECOGNITION - we value our relationships - with staff, supporters and the wider communities we serve - working together to achieve the best possible patient outcome. 	<p>Application form</p> <p>Interview</p> <p>References</p>



The Charity is committed to safeguarding and promoting the welfare of all stakeholders. All post holders are subject to a satisfactory Disclosure and Barring Service check (DBS) and satisfactory employment references, as well as identification, prohibition, qualification and barred list checks, which will be required before commencing duties