

**JOB DESCRIPTION**

**Job Title** **CRM Functional Consultant**

**School** **External Relations Directorate**

**Grade** **TBC**

**Campus** **Docklands**

**Responsible to** **CRM Centre of Expertise Manager**

**Liaison with** **Staff and External Organisations as required**

**Never Not Moving Forward**

Build your career, follow your passion, be inspired by our environment of success. #BeTheChange

The University of East London is one of the most diverse and vibrant universities in the global capital. Our pioneering and forward-thinking vision is making a positive and significant impact to the communities we serve, inspiring both our staff and students to reach their full potential.

Born in 1898 to serve the skills needs of the 2nd industrial revolution, the University of East London has commenced Year 6 of its transformational 10-year [Vision 2028 strategic plan](https://issuu.com/universityofeastlondon/docs/annual_review_2020?utm_source=Charlotte%2BWhite%2Btest%2Bmail%2Blist&utm_campaign=46c08a193b-EMAIL_CAMPAIGN_2018_09_19_02_52_COPY_04&utm_medium=email&utm_term=0_e8797a5163-46c08a193b-) led by our Vice-Chancellor & President, Professor Amanda Broderick, to advance Industry 4.0 careers-1st education. We have a clear route-map to provide a springboard for the jobs and opportunities of the future; drive diversity in the 4.0 talent pipeline - working in partnership to promote talent wherever it is found; and to create an inclusive and sustainable, green future.

We are looking for forward-thinking, innovative, curious, high-energy, self-aware people who are passionate about making a positive difference and who will thrive in an inclusive and diverse University community who are never not moving forwards.

As one of the most socially inclusive and international Universities and comprising one of the most diverse staff populations in the UK (50% of our professoriate identify from black or minority ethnic backgrounds), we are hugely proud of our track record in reducing inequalities (ranked 1st in the UK & 2nd globally, Times Higher Education Global Impact Rankings, 2020) and our commitment to equality, diversity and inclusion is at the heart of Vision 2028.

We are building an environment of success where colleagues are supported to achieve, and our community can flourish and thrive. We are an accredited Investors in People Award Institution and have achieved the Investors in People Health and Wellbeing Award. With Athena Swan Awards and being one of a small number of Universities to have achieved the Race Equality Charter Award, we continue on our journey to address and reduce barriers to opportunity.

So, if you are looking to build your career in a dynamic, inclusive and performance-focused team and are inspired by our environment and drive for success, we want you to apply to join the University of East London. We are looking for inspirational individuals who have a passion to make a positive difference to people and planet, creating a more sustainable future for everyone.

**THE DEPARTMENT:**

We have built an external relations directorate that has brought together an integrated Communications & Engagement and Student Recruitment & Marketing service. The directorate is made up of several teams including Communications & Engagement, Marketing, Recruitment and Conversion, Outreach and Access, Design and Digital, Events and Advancement and the International Office.

We are looking for team members who will be part of embedding an innovative practice and a digital first mindset within our External Relations Directorate. We seek individuals who not only enjoy working in an agile environment but also demonstrate a willingness to embrace new technology and transformational change. Together, we aim to cultivate a culture of 'continuous new', staying updated with emerging technologies and best practice across the sector.

UEL’s CRM (Dynamics 365) delivers end to end communications and customer service across the student journey, from initial enquiry to alumni membership. Launched in 2020, the project has 30 varied teams using the system and as users’ understanding and experience has grown, a backlog of improvements, data fixes and training needs have been identified. Sitting within External Relations’ Change & Transformation team the CRM Centre of Expertise Business Support Team works closely with users across the institution, the Project Team and IT technical specialists, to ensure the system’s potential is fully unlocked and CRM use flourishes at UEL.

**JOB PURPOSE:**

This role focuses on managing the functional aspects of the University’s Microsoft Dynamics CRM platform, including system configuration, customisation, and process optimisation to meet business needs. The role holder will implement custom entities, forms, workflows, and ensure seamless integration between Dynamics and other university systems while maintaining data quality.

They will address configuration-related issues, such as workflows, dashboards, and user permissions, collaborating with technical teams to resolve root causes and contributing to CRM technical solutions. They will work in close collaboration with the CRM Business Support Specialist to ensure data quality is maintained across the system.

The role involves advising on best practices to maximize business value and supporting design decisions with IT Services’ developers, integration and project teams.

The role holder will mentor junior staff, share technical knowledge, and peer-review development work to support continuous team improvement. They will represent the CRM at senior stakeholder meetings, build relationships across the university, and act as a key liaison between business users, technical teams, and external partners.

**MAIN DUTIES AND RESPONSIBILITIES**

1. Customise, configure, and implement solutions on Microsoft Dynamics O365 to ensure data quality and meet business needs.
2. Ensure seamless integration of CRM with university systems (e.g., student information, events, staff records, gym memberships). Working with the technical teams and the business to resolve issues and implement updates to ensure data integrity.
3. Monitor and resolve CRM configuration issues. Collaborating with the technical and business teams as required.
4. Work closely with stakeholders to gather detailed business requirements and translate them into CRM solutions.
5. Work with the COE Manager and Officers to conduct stakeholder workshops and process mapping sessions to understand and document the university’s functional CRM needs.
6. Document all work, creating functional specifications, user stories, and process flow diagrams. Ensure the CRM Data Dictionary is kept up to date.
7. Assist with user acceptance testing and training.
8. Work with the CRM Digital Trainer to ensure that training and support of new functionality is available to end-users.
9. Collaborate with the CRM Business Support Specialist to conduct data cleansing, deduplication, and data migration activities ensuring data integrity using tools like Kingsway Soft.
10. Identify opportunities for process improvements and recommend changes to enhance CRM usage.
11. Maintain a competent, skilled, and up-to-date knowledge of Dynamics 365 and related software (including Dynamics Customer Service App, Dynamics Marketing App, Dynamics Events, Power BI, GeckoEngage Forms and Events, SMS messaging, WhatsApp messaging, chat bot functionality, Data8 deduplication and Kingsway Soft data management).
12. Ensure adherence to best practices for CRM configuration, customization, the Microsoft Dynamics application lifecycle and solution deployment process and data security.
13. Use Jira to track project tasks, manage issues, and collaborate with cross-functional teams.
14. Work in accordance with UEL policies, including our Equality and Diversity and Data Protection policies.
15. To undertake other duties as required by the CRM COE Manager or Senior CRM Channel Manager.

**PERSON SPECIFICATION**

**EDUCATION QUALIFICATIONS AND ACHIEVEMENTS:**

**Essential Criteria:**

* Bachelor’s degree in Computer Science, Information Technology, or a related field (or equivalent experience) **(A/C)**
* Microsoft certified Dynamics 365 and Enterprise Integration expert **(C)**
* Experience with student records systems in a higher education environment **(A/I)**
* Experience with Power BI, SSIS (SQL Servicer Integration Services), SQL Programming Language and Visual Studio (SSDT). **(A/C/I)**

**Desirable:**

* Higher degree and/or professional qualification in, and/or substantial practical knowledge of customer relationship management, technical support, or related discipline **(A/C)**
* Advanced knowledge and certification of Power BI, SSIS (SQL Servicer Integration Services), SQL Programming Language and Visual Studio (SSDT). **(A/C/I)**
* At least 5 years’ experience with Microsoft Dynamics365 **(A)**

**KNOWLEDGE AND EXPERIENCE:**

**Essential Criteria:**

* Substantial experience managing technical and data aspects of Microsoft Dynamics 365 CRM, either client or agency side ideally within Higher Education. **(A/I)**
* Expert in manipulating data within a CRM system. **(A/I)**
* Experience of the Microsoft Dynamics application lifecycle and solution deployment process **(A/I)**
* Experience working within an Agile/Scrum project management framework. **(A/I)**
* Proven ability to convert information into actionable insights. **(A/I)**
* Excellent written and oral communication skills including the ability to negotiate and adjust information that needs careful explanation or interpretation to suit the needs of different audiences. **(A/I)**
* Strong knowledge of Microsoft Power Platform, including Power Automate, Power Apps, and Power BI. **(A/I)**
* Familiarity with Azure services and integration tools like KingswaySoft. **(A/I)**
* Familiarity with integrating Dynamics 365 CRM with other applications such as Gecko and platforms using tools like Power Platform, Azure Logic Apps, or third-party APIs. **(A/I)**

**Desirable Criteria**

* Experience of capturing and managing data via online forms and event software, preferably GeckoEngage **(A)**
* Experience of developing and implementing new initiatives and processes within a CRM system **(A)**
* Knowledge of programming languages and tools such as JavaScript, C#, and .NET.
* Strong project management skills **(A/I)**

**OTHER ESSENTIAL CRITERIA**

* Commitment to and understanding of equal opportunity issues within a diverse and multicultural environment **(A/I)**
* Commitment to building and ensuring a good reputation for UEL in all aspects of External Relations’ business with both internal and external clients. **(A/I)**

**Criteria tested by Key:**

A = Application form C=Certification I = Interview

P = Presentation R = Research papers T = Test