

# CRM Functional Analyst

## Position Description

<b>Directorate:</b>	Corporate Services
<b>Reports to:</b>	Manager, CRM Platform
<b>Direct reports:</b>	NIL
<b>Location:</b>	Flexible within any of the Society's main metropolitan or regional offices across NSW.
<b>Primary position objective:</b>	Identify, customise, configure and deploy CRM systems solutions to meet business requirements and provide advice to inform process development and training.

*The St Vincent de Paul Society is an Equal Employment Opportunity Employer*

### Directorate overview

This position is in the Corporate Services directorate. The teams within the directorate and their functions are:

**Strategy and Outcomes:** this team is responsible for implementing a Society-wide planning, monitoring and reporting framework to support the achievement of the goals of the Strategic Plan; and leading the measurement of performance and outcomes of Society programs, services and functions.

**Governance, Risk and Safeguarding:** this team is responsible for supporting good governance practices throughout the Society; provision of State Council and Board secretariat services; leading the development of organisational policy; safeguarding functions; and enterprise risk management.

**Legal:** this team is responsible for delivering legal services, and privacy and complaints functions.

**Policy and Advocacy:** this team is responsible for developing informed public policy positions on issues relevant to the people we serve; directing relevant research; and developing and implementing related advocacy strategies.

**Safety and Workforce Operations:** this team is responsible for state-wide work, health and safety strategy; work, health and safety audits; wellbeing; return to work; recruitment and retention; and employment relations.

**People Strategy and Development:** this team is responsible for people strategy; people policy; diversity; organisational development; and learning and development.

**Information and Communication Technology:** this team is responsible for state-wide ICT strategy; ICT project management; design and implementation of new ICT systems; ICT service desk, and cybersecurity.

## Accountabilities and responsibilities

The CRM Functional Analyst will:

- Contribute to the successful implementation of the Strategic Plan within their team.
- Work with the business to elicit high-level requirements and capture business needs
- Articulate and document business requirements, to conduct as-is/to-be process mapping and business process re-design
- Communicate system design and validate proposed solutions with business at different levels (Execs and Business Users)
- Obtain key inputs from the enterprise architect and identify solution interdependencies
- Incorporate usability and user interface needs when designing business solutions
- Assess the risks of various solutions and prioritise competing business demands.
- Develop test cases required for testing the system changes for all scenarios.
- Conduct unit and system testing to ensure changes have been made in accordance with the business requirements.
- Support the translation of business requirements into CRM solutions, including requirements approval, communication, traceability and reuse
- Transfer of functional requirements to development teams
- Contribute to building the solution by customizing and configuring CRM.
- Conduct end-user trainings.
- Contribute to providing level 1 technical support.
- Stay abreast on updates and new releases in CRM technologies.
- Contribute to a safe working environment for staff, members and volunteers by implementing the Society's workplace health and safety practices.
- Contribute to the implementation of effective risk management procedures to ensure compliance with legal, employment and governance requirements.

## Critical Key Performance Indicators (KPIs)

- Provide high quality, timely and user-centred analysis to deliver on the Society's business and user requirements.

## Key working relationships

In addition to the Manager, CRM Platform and their direct reports, the CRM Functional Analyst will foster close working relationships with:

- Bi Data Platform team (Corporate Services).

## Essential criteria

### Critical capabilities

There are nine capabilities expected of all employees across the Society:

- **'People we serve' centric:** (Level 1) Deliver, or support the delivery of, high-quality services that provide a hand up for the people we serve.
- **Values based leadership:** (Level 1) Develop an understanding and respect for and be aligned to the Society's mission, vision, values and lay Catholic heritage.
- **Impact focus:** (Level 1) Contribute to the delivery of positive impact through informed decision making and efficient and effective use of resources.
- **Collaboration:** (Level 1) Work collaboratively with others to solve challenges, foster the Society's mission and implement the Strategic Plan.
- **Change leadership:** (Level 1) Support the implementation of change.
- **Team performance:** (Level 1) Develop own performance and contribute to team performance.
- **Digital engagement:** (Level 2) Enable and facilitate participation in virtual, dispersed teams using digital tools.
- **Innovation and improvement:** (Level 1) Contribute to generating new ideas that will improve services and ways of working.
- **Financial acumen:** (Level 1) Use the Society's resources responsibly.

### Role-specific criteria

- Relevant tertiary qualification/s in Business and 5 years' + experience in business analysis and process design.
- Demonstrated experience working with software applications and testing system changes.
- 3 + years' demonstrated experience with Microsoft Dynamics 365
- Strong functional knowledge of Dynamics 365 Customer Engagement.
- ICT policy, procedure and process development.
- Learning and development experience.
- Experience working with an Agile product development team preferably in a Product Owner role.
- Previous experience on scrum teams.
- Demonstrated ability to adapt to new environments/systems, respond to changing demands.
- Detail oriented with high degree of accuracy.

### Desirable criteria

- Experience working in a membership-based organisation to support and empower members and volunteers.
- Experience working with Agile tools (Azure DevOps preferably).
- Dynamics CRM certification and Agile certification.
- Experience with ClickDimensions.
- Knowledge of PowerApps and Power Automate.

- Experience working on projects integrating with digital, mobile and CMS platforms.