Senior CRM Functional Analyst
Position Description

Directorate:	Corporate Services
Reports to:	Manager, CRM Platform
Direct reports:	NIL
Location:	Flexible within any of the Society's main metropolitan or regional offices across NSW.
Primary position objective:	Identify, design, 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.

People and Culture: this team is responsible for the Society's people related functions and strategy including people strategy; people policy; people systems; diversity and inclusion; organisational development; recruitment; workforce operations; employment relations and business partnering.

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.

Safety and Emergency Management: this team is responsible for state-wide work, health and safety strategy; work, health and safety audits; wellbeing; return to work and emergency management functions.

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
- Work with the CRM platform manager to put the high-level solution 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.
- Mentor the junior functional analysts within the CRM team
- 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.