Manager, CRM Platform

Position Description

Directorate:	Finance
Reports to:	Chief Information Officer
Direct reports:	Senior CRM Developer CRM Dynamics Developer/s ERP Financial Technical Lead CRM Functional Analyst
Location:	Flexible within any of the Society's main metropolitan or regional offices across NSW.
Primary position objective:	The development and operation of the Dynamics Platform, including its availability, architecture, security, operational and development team, associated costs and budget, levels of technical debt, disaster recovery, backups and its strategic roadmap.

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

Directorate overview

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

Finance and Accounting: this team is responsible for state-wide finance policies and procedures; finance shared services (accounts payable, accounts receivable); treasury and investment functions; financial reporting to external stakeholders; financial strategy and special projects.

Group Financial Planning and Analysis: this team is responsible financial budgeting, forecasting and reporting; targeted financial analysis for senior management; strategic and operational advice to senior leadership to improve financial decision-making and business performance; and financial business partnership. The Finance Manager roles embedded in Vinnies Services and Commercial Enterprise, Fundraising and Communications directorates sit with this team.

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

Property and Facilities: this team is responsible for state-wide property management and facilities management

Procurement and Fleet: this team is responsible for procurement; and fleet.

Payroll: this team is responsible for organisation wide payroll.

Accountabilities and responsibilities

The Manager, CRM Platform will:

- Ensure the successful implementation of the Strategic Plan within their team.
- Ensure a safe working environment for staff, members and volunteers by implementing the Society's workplace health and safety practices.
- Ensure that staff and volunteers complete relevant pre-engagement checks (National Criminal History check, and where required Working With Children Check); act in accordance with the organisation's Code of Conduct and Member and Volunteer Charter; and comply with the organisation's Workplace Health and Safety program.
- Contribute to the implementation of effective risk management procedures to ensure compliance with legal, employment and governance requirements.
- Develop and operate a flexible CRM platform (including its availability, architecture, security, operational and development team, associated costs and budget, levels of technical debt, disaster recovery, backups and its strategic roadmap) that will allow Vinnies to rapidly and securely leverage Dynamics CRM and deploy purpose-built business solutions.
- Determine most effective Dynamics CRM platform architecture.
- Maintain and then migrate legacy CRMs to Dynamics CRM.
- Make decisions to select the most efficient, secure and effective technical solution (to meet business requirement within budget and time constraints while considering solution performance).
- Select and arrange required backups of libraries, code and environments in line with the organisational DRP.
- Recruit and select of Dynamics platform team members.
- Determine and implement best practice for all owned processes to achieve SLAs.

Customer Service

- Assist and support internal customers with using our services throughout projects and operations, supporting and mentoring them through the relevant processes.
- Build positive relationships with internal customers during projects to ensure that our relationships with internal customers are strong, profitable and enduring.
- Work with our customers to identify and describe business benefits for their projects.

Vendor Management

- Engage with Dynamics CRM vendors to ensure that strong partnerships exist between the vendors and the Society for both current operations and for future direction.
- Responsible for the relationship management, tracking, troubleshooting and reporting of all Dynamics CRM related contract commitments made with vendors.
- Provides and presents ad hoc analyses such as contract terms, dollar spend, process compliance.
- Ensure CRM availability, metering and cross-charging.

Projects

- Evaluate new technological developments and evolving business requirements.
- Leads the development of Dynamics CRM solutions or offerings, in translating the business needs into technical requirements.
- Identifies gaps, strategic impacts, financial impacts and the risk profile in the technical solution

or offering, and provides technical support.

- Provide high-level specialized technical support and consultation to both business and Technology Services management.
- Provide cost and technical inputs into major project business cases.

Operations

- Manage service levels within agreed and set budgets.
- Support the move to DevOps and increase levels of Dynamics CRM test automation and CICD maturity.
- Report and Manage technical debt levels.
- Ensure support tickets escalated by the Service Desk are closed within SLAs.
- Proactively identify problems, prioritise and continuously improve.
- Manage a scrum team of Dynamics CRM Developers, BAs and testers to coordinate successful project and operational outcomes.

Security

- Ensure the security maturity of the Dynamics CRM platform.
- Ensure DR is in place for Dynamics CRM, is tested regularly and works.
- Ensure Security and Architecture is maintained by solutions proposed and implemented.

Critical Key Performance Indicators (KPIs)

- Customer surveys are conducted with reporting indicating satisfaction levels and quality of enabling services have improved.
- Demonstrated efficiency gains from more reliable and effective technology systems.

Key working relationships

In addition to the Chief Information Officer and their direct reports, the Manager, CRM Platform will foster close working relationships with:

- Executive Directors and Directors across the Society (based on project priorities);
- Director, Strategy and Outcomes (Strategy and Governance);
- ICT leadership team.

Essential criteria

Critical capabilities

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

- **'People we serve' centric:** (Level 3) Manage the delivery of high-quality services that provide a hand up for the people we serve.
- **Values based leadership:** (Level 3) Manage teams and areas of work to align to the Society's mission, vision, values and lay Catholic heritage.
- **Impact focus:** (Level 3) Manage the delivery of positive impact through informed decision making and efficient and effective use of resources.
- **Collaboration:** (Level 3) Manage collaboration with Conferences, directorates and teams to create opportunities, solve challenges, foster the Society's mission and implement the Strategic

Plan.

- **Change leadership:** (Level 3) Manage and mobilise resources to deliver change.
- **Team performance:** (Level 3) Manage and develop individuals and teams to deliver against Society's strategic priorities.
- **Digital engagement:** (Level 3) Manage virtual, dispersed teams and stakeholders using digital tools.
- **Innovation and improvement:** (Level 3) Facilitate an improvement in existing and new services, and ways of working.
- **Financial acumen:** (Level 3) Manage the team's resources, projects and services to deliver positive outcomes within budget.

Role-specific criteria

- Relevant tertiary qualification/s in Information Technology or equivalent.
- Demonstrated experience in ICT project delivery.
- Demonstrated expert knowledge of CRM Platforms.
- Substantial Dynamics CRM Technical Team lead and development experience.
- Dynamics CRM certification.
- Team management/leadership experience.
- Substantial experience application development using ASP.NET Framework, C#, JavaScript and MS SQL Server.
- Experience with IIS Administration.
- Experience with SSRS and SSIS.
- Substantial experience managing vendor quality assurance.
- Communicate well and multi-task under tight deadlines.
- Be a team player and a problem-solver.
- Customer-oriented approach.
- Excellent verbal and written communication abilities.
- Technical proficiency - developing cloud-ready applications based on open standards, network development and monitoring and cybersecurity.

Desirable criteria

- Experience working in a membership-based organisation to support and empower members and volunteers.
- Certified Scrum Master.
- DevOps Certification.
- Experience developing secure web applications and web services.
- Experience developing Micro-services.
- Substantial experience working in a mature DevSecOps environment.
- Experience working on projects integrating with digital, mobile and CMS platforms.