# Position Description

# CRM Product Owner – Client Services

## Purpose of Position

This role is responsible for the optimisation and adoption of the Salesforce CRM (known as “CMS” – Client Management System) critical to the many and varied Service Delivery programs at Vision Australia.

Drawing on your deep knowledge of the disability and or aged care service industries and CRM systems, the role will be required to define and guide the execution of the CMS product roadmap. You will act as primary liaison between business, technology and vendor stakeholders, prioritising the product backlog and ensuring that the CMS solution’s evolution continues to be fit for purpose and generates significant business value for Vision Australia.

The role is suited for someone who has expertise in the disability and aged care service industries, is well-versed in stakeholder management, and has strong experience participating in the delivery of complex technology projects

## Context

Vision Australia is a national, for purpose organisation that aspires to have a positive measurable impact on the lives of people who are blind or have low vision in the areas of education, employment, independence and social inclusion. The organisation is proactively transforming itself in response to major changes in our funding models and the expectations of the blind and low vision community resulting from the introduction of the National Disability Insurance Scheme (NDIS) and Aged Care reform.

Vision Australia implemented Salesforce in 2016 as part of this ongoing business transformation program. Since that time the CMS has seen ongoing investment and expansion to support a diverse range of customer facing programs offered by Vision Australia including personalised support and therapy, group services, library, retail, call centre and volunteer services across 715 users. These functions represent approximately $40million in revenue per annum for the organisation.

This position sits within the Technology Services Division of Vision Australia, and provides leadership of the Salesforce CMS team – which comprises a mix of internal resources and external partners.

## Principal Responsibilities

* Collaborate with business and technology stakeholders to define the CMS product roadmap, deliverables and targeted business objectives with measurable outcomes;
* Own the CMS backlog and collaboratively set priorities for enhancements and feature development with business stakeholders;
* Provide program management of delivery pipeline leveraging a mix of internal resources and external partners;
* Lead the CMS Centre of Excellence, developing effective ways of working that fosters collaboration, problem solving and effective and sustainable delivery.
* Facilitate and lead the mapping of critical business processes; identify efficiencies and deliver optimised improvements that promote simplification and consistency.
* Engage and collaborate with business stakeholders across all levels within the organisation, in many cases needing to challenge and break long-standing practices to promote simplification and drive business outcomes.
* Lead the change management, working with business process owners, system trainers and CMS champions to increase adoption;
* In partnership with the Business Performance Manager, develop good data governance through data policies, standards and practices across the business operations to improve overall data quality and management;
* Keep the CMS operational process and systems documentation up-to-date and high standards and ensure compliance with the documented operational processes;
* Other duties as required by the Manager;
* Assist with maintaining a high standard of safety at Vision Australia by following all safety procedures at all times and acting safely, not putting yourself or other people at risk by your actions or omissions. Ensure that all work performed is in accordance with Vision Australia policies & procedures.

## Key Performance Indicators

Key performance indicators will be clearly defined through the performance planning process.

## Essential Qualifications and Experience

* Minimum 3–5 years’ experience working in or directly with disability and/or aged care service of comparable size and variety to Vision Australia;
* Significant contribution to the successful delivery and adoption of a new Customer Relationship Management system, either in a Service Delivery leadership team or product owner role;
* Thorough understanding of the Salesforce CRM platform ecosystem, particularly in a disability/aged care service delivery context;
* Strong experience with vendor and partner management, building strong and mutually beneficial relationships, that deliver successful outcomes;
* Demonstrated ability in business analysis and the preparation of business cases that support an accountable process of prioritising and delivering outcomes for business stakeholders;

## Essential Skills

* Ability to work in an agile, complex, and rapidly changing environment;
* Energy for leading and embedding a culture of continuous improvement;
* Excellent oral and written communications skills;
* Comfortable working in a hybrid environment, with a geographically diverse team comprising both internal and partner resources;
* Well-developed interpersonal and relationship building skills including negotiation and conflict resolution;
* A proven ability to prioritise conflicting workloads and consistently hit targets;
* Use of project management tools including JIRA, Visio, and all Office Tools.

## Organisational Values

The expectation that we set is that our workforce understands and models our values and behaviours in everything they do 100% of the time.

* Person-Centred - We measure our success in terms of outcomes for our clients;
* Accountable - We hold ourselves responsible for what we do and don’t do;
* Collaborative - We work well together and with others to deliver the best possible outcomes;
* Commercially Focussed - We work efficiently and responsibly to sustain and grow our services and influence;
* Agile - We will adapt, learn and innovate to have a positive impact in a changing environment.

## Vision Australia environment

Many Vision Australia employees work with Seeing Eye Dogs and all employees are likely to have contact with working dogs.

Employment is subject to the Organisation receiving a National Police Record Check and if relevant, a Working with Children Check or QLD Blue Card or Vulnerable Persons (ACT) check.

## Role Scope

**Reports to: Business Technology Manager**

Direct Report Staff: 0

In-Direct Report Staff: 0

**Key Relationships:**

Internal

* Chief Information Officer
* General Manager Fundraising, Marketing and Communications
* Fundraising Operations and Analytics Manager
* CRM Project Manager
* Fundraising Program Managers
* National Contact Centre Manager

External

* CRM Vendor
* Fundraising Consultants

## Review of Job Description

This job description will be reviewed in line with the performance planning and appraisal process.

END