

# Membership CRM Manager

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| JOB DETAILS | |
| Job Title: | Membership CRM Manager |
| Reports to (title): | Head of Membership, Learning and Support Services |
| Date: | February 2018 |

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| PURPOSE OF THE JOB |
| In 2017 Cochrane launched a new contribution-based membership scheme underpinned by the deployment of a Customer Relationship Management (CRM) system (SugarCRM). This is a significant step forward in developing our engagement strategy with current and potential contributors through which we hope to provide a great experience for everyone involved in Cochrane.  As part of the new Membership, Learning and Support Services team within Cochrane’s Central Executive, the Membership CRM Manager will be responsible with the Head of Department for management and development of Cochrane’s membership scheme; and use her/his expertise in SugarCRM to continuously improve our member experience and develop the role of the CRM in providing insights for organisational decision-making. The post holder will also manage Cochrane’s Learning Record Store system.  The post holder would, ideally, be based in our London office. |

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| PRINCIPAL ACCOUNTABILITIES/KEY RESULT AREAS |
| **CRM Management**   * Manage the membership CRM (SugarCRM) as system owner, including administering user accounts, ensuring membership processes are running accurately and other day to day tasks. * Facilitate and promote use of CRM data and develop the role of the CRM in reporting and informing business decisions. * Take responsibility for developing the CRM system to support the further development of Cochrane’s membership scheme. * Undertake changes to the CRM that do not require involvement of the CRM provider, such as adding new fields or modules and working with process definitions. * Act as the main point of liaison between Cochrane and the CRM provider, and project manage CRM development work that needs to be outsourced to our CRM provider. * Liaise with other system specialists and Cochrane’s IT Services department regarding current and new system integrations with SugarCRM.   **Learning Record Store (LRS) Management**   * Act as system owner for our Learning Record Store system (Learning Locker), including administering users accounts, and supporting others to make use of the LRS. * Take responsibility for developing, and providing on an ongoing basis, reporting from the LRS system to meet the needs of the Membership, Learning & Support Services team and Cochrane Innovations’ Interactive learning sales team.   **Membership Management and Development**   * Ensure that membership processes are working day to day, and resolve any issues arising. * Support the Head of Department with membership engagement activities. * Work with the Head of Department on membership development activities, such as conceptualising and implementing new membership journeys. * In collaboration with other team members, ensure that the Drupal-based membership webpages at [join.cochrane.org](http://join.cochrane.org/) provide a good experience to current and potential members.   **Community Support**   * Collaborate with the Membership, Learning & Support Services team responsible for community support to respond to CRM/membership-related tasks or enquiries through providing training and routine support as needed. * Contribute to the continuous improvement of activities, systems and processes relating to all aspects of membership support. * Train and support SugarCRM users.   **General**   * Contribute to the development and implementation of team work plans*.* * Undertake any other duties that may be considered appropriate. |

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| PERSON SPECIFICATION |
| **Essential:**   * Extensive knowledge of CRM, including experience of using SugarCRM, preferably in a membership setting. * Experience of managing a membership scheme. * Experience in advanced CRM system administration skills and experience of developing CRM reporting to meet business needs. * Experience with software and systems related to customer service (e.g., Jira, Fogbugz); email marketing (e.g., Mailchimp); website content management systems (e.g., Drupal). * Knowledge of data protection requirements related to a CRM system; in particular, how that affects communications. * Experience in providing excellent customer service, training and support to others, including good attention to detail to ensure that users are always receiving accurate information. * Excellent interpersonal and communication skills (both verbal and written), including experience in communicating technical content, and working with people from a variety of cultural and linguistic backgrounds and being able to tailor communications accordingly. * Project management skills and experience of managing external suppliers. * Ability to solve creatively problems based on prior experience and knowledge of the systems and products. * Self-motivated and results-oriented, with excellent organisation and time management skills, including the ability to work to deadlines under limited supervision. * Familiarity with and commitment to Cochrane’s mission and values.   **Preferred:**   * An understanding of Cochrane’s membership scheme. * An understanding of Cochrane’s work in the production of systematic reviews of healthcare evidence. * Experience in working collaboratively within complex organisations, including diverse and geographically dispersed staff, collaborator and stakeholder groups; and being part of a remote team. * A working knowledge of the academic publishing environment and editorial issues. * Experience working with teams in a not-for profit or low resource setting. |

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| KEY INTERFACES |
| **Internal:** Other members of Membership, Learning & Support Services; the Central Executive Team’s IT Services Department; *Project Transform* team; Cochrane Groups; Cochrane Innovations; Cochrane members and supporters.  **External:** CRM provider; SugarCRM; MailChimp, LRS Provider, and any other external providers who may provide integrations we require for the CRM. |

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| DIMENSIONS |
| Budgetary responsibility: N/A  Number of direct and indirect reports: N/A |