



Position Description

JOB TITLE: Customer Data & Analytics Manager

DEPARTMENT: Fundraising

REPORTS TO: Head of Engagement

LAST DATE REVIEWED: March 2021

JOB SUMMARY

The Customer Data & Analytics Manager is critical to the success of the Institute's fundraising and customer engagement. The role is focused on improving the management of customer data and business processes to achieve greater efficiency and effectiveness.

This includes working closely with the Head of Engagement to analyse the multifaceted needs and opportunity of the business to provide a rolling vision and roadmap for our data-led future. The position works to manage stakeholders, triage issues and priorities, lead projects and leverage Salesforce to enable processes that lead to growth.

The role also leads the Supporter Care team (currently, via a Team Leader) to ensure accurate and timely processing and consolidation of general customer enquiry and transactions.

The role is accountable for delivering:

- A vision and roadmap for data management, business processes and reporting to increase net revenue
- Effective people leadership to achieve agreed outcomes
- Improved Salesforce business practices and processes
- Value-adding analysis and insights to customer data
- Efficiency through integration, automation, adoption, training, and self service
- Documentation of business rules and processes
- Oversight of processing of customer enquiry and transactions
- Regulatory and statutory fundraising compliance

The Customer Data & Analytics Manager sits on the Fundraising & Marketing Leadership Team and is also required to work with our Technology Services Group and Finance teams to deliver on business dependencies.

PRIMARY TASKS / RESPONSIBILITIES

Leadership and management

- Strong, passionate, and inspirational leadership across the organisation
- Management of a Salesforce Administrator and Supporter Care team (currently, via a Team leader)
- Support the Head of Engagement to develop and deliver the Fundraising strategy and associated annual fundraising business plans
- Provide vision and direction for our data-led future



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- Management of projects to drive improvement
- Acting as lead fundraising stakeholder for relevant digital and systems projects

Business and data analysis

- Analysis of customer behaviour and campaign effectiveness resulting in customer recruitment and retention
- Analysis of donor lifetime value and causality
- Analysis of bulk processing, including online, peer to peer, regular giving payment and churn management
- Analysis of business process and Salesforce practices
- Providing value-add insights and reporting to inform decision making

Operational delivery

- In collaboration with the Salesforce Administrator provide SME for Salesforce best practice, including adequate and timely training and support of teams
- Ensure team upholds professional, quality customer service to internal and external customers
- Oversee co-ordination with Finance and Fundraising Managers to reconcile gifts and ensure monies are deposited in a timely manner to the correct fund
- Ensure fundraising stakeholders are briefed to comply with business rules and data governance to ensure customer privacy and improve data quality
- Work with Finance and Legal teams to ensure compliance with all state government charity and fundraising legislative requirements
- Develop, administer, and monitor key fundraising policies and procedures and ensure their integration with other institute policies and procedures.

KEY SKILLS

- Excellent leadership and managerial skills including ability to develop, delegate, coach and motivate direct reports
- Strategic planning and operational excellence that delivers on agreed expectations and deadlines
- Salesforce SME
- Project management
- Stakeholder management and communication
- Systems and data analytics
- Customer focused
- Knowledge of fundraising best practice
- Exceptional attention to detail
- Solutions focused team player
- Computer proficiency and knowledge of Microsoft Office

EXPECTED OUTPUTS

- In collaboration with the Head of Engagement deliver a rolling vision and roadmap for our data-led future
- Heightened adoption, appreciation and understanding across the group about the value and function of data



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- Evidence of efficiency gains through new or improved business processes and practices
- Data-led insights that demonstrate measurable value-add
- Improved data hygiene
- Reports that clearly demonstrate programme effectiveness to stakeholders
- Documentation and clarity of business rules and processes

MINIMUM REQUIREMENTS

Qualifications

- Tertiary qualifications in Business, Management, Technology, or equivalent work experience

Experience and requirements

- Minimum two years' experience in fundraising and Salesforce management
- Demonstrated and proven experience in managing a team
- Demonstrated experience in developing and implementing analytical reports and actionable insights
- Demonstrated experience in the review, development and implementation of policies and procedures

SERVICE STANDARDS AND GENERAL EXPECTATIONS

- Respond to phone calls and emails within 48 hours
- Read internal communications within 48 hours
- Maintain up to date personal information in the HRIS (ConnX - Self Service) at all times

COMPLIANCE AND CODE OF ETHICS AND CONDUCT

Staff members are responsible for ensuring that they are familiar with and comply with their conditions of employment as stated in their individual contract, all Children's Cancer Institute Policies and Procedures and relevant ethical and regulatory guidelines. Staff must be aware that breaches by individuals will not be tolerated or condoned and may be subject to the Disciplinary Action Policy.

Your knowledge and awareness of Children's Cancer Institute Policies and Procedures (including the Code of Ethics and Conduct), will be monitored from time to time to ensure that our compliance program is effective.

Part of compliance adherence involves the use of standardised forms, checklists, and other aids (as appropriate) to ensure that important compliance issues are not overlooked. All forms must be used in accordance with instructions and the procedures as outlined in the relevant policies and procedures to ensure that compliance to the laws and regulations occurs.

WORK HEALTH & SAFETY

- Must adhere to all WHS policies and procedures including reporting incidents within 24 hours
- Take reasonable care for their own health and safety and the health and safety of other people who may be affected by their conduct in the workplace



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- Actively participating in health and safety meeting, training and induction programs
- Complying with all safe work procedures and instructions
- Use equipment in compliance with relevant procedures, without wilful interference or misuse
- Ensure that any hazardous conditions, near misses and injuries are reported immediately to the supervisor and in the WHS reporting system (Myosh)
- Must not wilfully or recklessly interfere with or misuse anything provided in the interest of environment health and safety or welfare

REPORTING STRUCTURE

Position reports direct to: Head of Engagement

Departmental Structure: See Organisation Chart

Note: *Reporting structure may change subject to management decisions and business requirements.*