
University of Sunderland

Role Profile

Part 1

Lifechanging



**University of
Sunderland**

Job Title:	Customer Relationship Management (CRM) and Helpline Assistant
Reference No.	MAR177
Reports to:	CRM Officer
Grade:	B
Working Hours:	37
Faculty/Service:	Marketing and Recruitment
Location:	Edinburgh Building, City Campus
Overall Job Purpose:	This role reports directly to the CRM Officer. Its purpose is to support the Campaign and Conversion Manager and CRM Officer in ensuring the CRM system is kept up to date and used in the correct way. To respond to a range of potential students' enquiries via the Helpline and other routes including LiveChat, Twitter, WhatsApp and Email and other emerging platforms which may be used in the future.
Key Tasks and Results:	<ul style="list-style-type: none">• To provide applicants and enquirers with accurate information about the university including course fees, course information, accommodation, student finance etc. and to respond to incoming inquiries across digital channels, print, email and in person when required.• To liaise with other teams and departments including the Client Relationship team, Brand and Client Marketing, and Admissions, to keep up to date with all policies and procedures relating to the application process.• Update and maintain accurate records for enquirers, applicants and other target audiences in the CRM system.• Under the direction and supervision of the CRM Officer, undertake basic CRM duties such as, managing and maintaining filters to ensure effective segmentation of records for specific messages and campaigns.• To be responsible for date cleansing of the CRM system.

- To support the analysis of data through general housekeeping exercises i.e. the collation of data and accurate record keeping. Provide written reports to the CRM Officer.
- Contribute to the effective and efficient running of the team as directed by the Campaign and Conversion Manager.
- Perform administrative tasks in support of the CRM function.
- Support colleagues in the wider team with handling inquiries, delivering outbound call centres, attending events such as Open Days and applicant events.
- Promote the work of the Campaign and Conversion team and good practice to internal and external groups and individuals.
- Contribute to the efficient functioning of the team, department and service as directed by the Campaign and Conversion Manager and CRM Officer.
- Undertake any other duties deemed to be commensurate with the post that will contribute to effective and efficient service delivery.
- Undertake and support staff development as appropriate
- All staff across the Service are required to be flexible to support the focus on student recruitment.
- All teams will be required to assist and support key recruitment events such as Open Days and Clearing. To support the Client Relationship team by attending key recruitment events such as when key subject area knowledge is required or additional personnel will benefit the customer experience and deliver the key brand and subject selling points

Special circumstances:

A flexible approach is required. This post will require working additional hours (including weekends and evenings) at key periods during the year. DBS clearance may be required in order to carry out this role. Occasional regional and national travel will be required.



Part 2A Qualifications, Experience and Expertise:

Essential

Qualifications and Professional Memberships:

- Educated to A-level or equivalent, or possess significant relevant professional experience within a similar role.

Experience:

- Experience in using and maintaining customer focused databases in a higher education, public sector or commercial environment.
- Experience of supporting users in their use of IT, electronic information and system analytics.
- Proven experience of working within a role that requires effective planning and organisational skills, strong attention to detail and an ability to negotiate, persuade and influence.

Key Knowledge and Expertise (specific):

- Ability to build and develop relationships with a wide range of individuals and teams.
- Knowledge of the UK higher education sector and how institutions use student data to meet institutional aims and objectives.
- Ability to work flexibly and think on your feet.
- Ability to pay attention to details and work under pressure to tight deadlines.
- Ability to work as part of a team, but also have the confidence to work independently (and plan/organise own workload).
- Ability to adapt a flexible approach to the demands of a dynamic environment in order to accommodate changes in priorities when required.
- Proven IT skills within a wide range of packages, specifically Microsoft Office, including Word, Excel, PowerPoint and Outlook.

Desirable

Experience:

- Educated to degree level, or possess significant relevant professional experience within a similar role.
- Experience in a higher education focused environment providing a key first line service to customers.

	<p>Key Knowledge and Expertise (specific):</p> <ul style="list-style-type: none"> • Previous working knowledge of Hobsons Connect CRM system. • Working knowledge and understanding of the University SITS (student records) system or similar comprehensive records system.
<p>Part 2B Key Competencies:</p> <p><i>Competencies are assessed at the interview/selection testing stage</i></p>	<p>Analysis & Research</p> <ul style="list-style-type: none"> • Uses appropriate sources of data to answer questions • Gathers data systematically • Carries out analysis accurately and methodically <p>Communication</p> <ul style="list-style-type: none"> • Non-routine matters are clarified • Complicated matters are explained clearly • Content of message is structured logically • Is able to understand, use and explain technical terms commonly in use in own area of work • Responds appropriately to requests for information • Information and messages are conveyed accurately and promptly <p>Planning and Organising Resources</p> <ul style="list-style-type: none"> • Prioritises work to achieve objectives to the standards expected • Proactively works with others achieve their and the team's objectives • Takes steps to reduce the waste of resources <p>Service Delivery</p> <ul style="list-style-type: none"> • Provides accurate and timely information • Correctly refers customers elsewhere • Has accurate knowledge of services available in own and related areas of work • Learns from complaints and takes action to resolve them <p>Teamwork & Motivation</p> <ul style="list-style-type: none"> • Contributes to the work of the team • Provides support, assistance and cover to other members of the team <p>Work Environment</p> <ul style="list-style-type: none"> • Follows good practice guidance and complies with health, safety and welfare policies • Accepts responsibility for the effect actions may have on others
<p>Date completed:</p>	<p>May 2016</p>

