

Job Summary

Job title	Membership / CRM Executive
Reports to	Associate Director of Membership and Professional Standards
Division	Membership and Professional Standards
Grade	

Role Purpose:

- Management and development of the membership CRM (Microsoft Dynamics 365) and associated processes.
- Responding to queries about membership and processing applications, upgrades, etc.

Responsibilities and Duties:

- Responsible for the maintenance and development of the membership CRM and for ensuring appropriate administrative systems, procedures and documentation are in place.
- Responsible for the accuracy of the data on the CRM including monitoring day-to-day data quality, carrying out data cleaning tasks, and setting up processes which ensure that the integrity of our data is future-proofed and working to its full capability.
- Resolve issues with applications for admission and re-admission to membership including upgrades and the renewal process.
- Working with the IT department and system developers as appropriate to ensure that the database meets the needs of the organisation, including automating or simplifying tasks as appropriate and developing reports and dashboards as required.
- Produce and keep under review documented procedures on the operation of the membership CRM and ensure that they reflect current procedures.
- Collate membership data and produce management information and reports for Boards and Committees, listings of members for promotional purposes and financial reports.
- Carry out any other duties required from time to time as directed, in furtherance of the objects of CIEH.

Person Specification

The following are essential qualities in the post-holder:

- High level of autonomy required in relation to the operation of the membership CRM.
- A sound understanding of the role and functions of membership organisations or professional bodies.
- Execute all financial operations in accordance CIEH's Charter, Byelaws and other documented procedures and the relevant Companies and Charities Acts.
- To act responsibly with data held by CIEH, adhering to the provided guidelines and policies and reporting any concerns or possible breaches to CIEH's Data Compliance Officer.

Typical Experience and Expertise:

- Educated to degree level or equivalent
- Experienced user of CRM Microsoft Dynamics 365 within a membership organisation or charity setting.
- Proven experience of membership database management.
- Experience of driving improvement across organisations.
- A high standard of IT literacy, including data interpretation and manipulation.
- Excellent communication and interpersonal skills
- A good understanding of current data management legislation, especially GDPR.
- Experience of applying membership criteria
- A can do attitude with a flexible and adaptable approach to work

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