

JOB DESCRIPTION

Name:

Role:

CRM and Data Manager

Team:

Marketing

Our Values PASSIONATE, PERSONAL and PROFESSIONAL



PURPOSE OF ROLE

- Administer and manage the firm's data - client data, 3rd party data providers, data systems and processes.
- Create management information and reports, including working with data reporting and visualisation tools as required
- Responsible for the company CRM system (Workbooks) and the integrity of the underlying static, core data relating to clients, prospects and contacts
- Working closely with colleagues across Marketing, the wider firm and third party data suppliers.
- Ensure all client, contact and prospect related data is uploaded and managed in a legally compliant manner in line with commercial best practice
- Generate regular reports, liaising with colleagues from across the firm for the provision of accurate core data sets as appropriate
- Responsible for training existing Team Members and new Team Members, ensuring they understand and comply with CRM-related data management processes