



The  
**Wildlife**  
Trusts

# CRM Insights Manager

RECRUITMENT PACK

**Salary: Up to £35,000**

**Location: Home based with occasional travel to Newark office/UK**

**Full time: 35 hours per week (Mon-Fri)**

**Permanent contract**



Royal Society of Wildlife Trusts

Registered Charity N° 207238

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## About Us

The Wildlife Trusts are a federation of 46 charities, supported by a central charity, the Royal Society of Wildlife Trusts. Together we have over 940,000 members, 32,500 volunteers and 3,400 staff across the UK.

From precious peatlands and wildflower meadows, to Britain's lost rainforests, Wildlife Trusts have restored and care for some of the most special places for wildlife in the UK. We've re-wiggled rivers, brought back beavers to the UK and helped thousands of communities take matters into their own hands to bring back nature on their doorsteps. Collectively we manage more than 2,600 nature reserves, operate 123 visitor and education centres and own 29 working farms. We undertake research, we campaign for wildlife and wild places under threat, and we help people access nature.

But we're not standing still. The next few years will be critical in determining what kind of world we all live in. We need to urgently reverse the loss of wildlife and put nature into recovery at scale if we are to prevent climate and ecological disaster. We have an ambitious new strategy to address this, setting out our bold vision of nature in recovery with many more people taking action for wildlife.

## About You

Are you passionate about using data to drive strategic fundraising decisions and make a real difference to nature in the UK?

We are seeking an exceptional supporter data specialist to join one of the UK's best-loved nature charities at an exciting time in our 112-year history. Working closely with our fundraising teams, senior leadership team and Wildlife Trust colleagues across the UK, you will be instrumental in enhancing our fundraising through developing insights and processes that take our relationship management to the next level.

You will be a confident and engaging database expert, with the ability to generate insights into relationships from a range of audiences – from businesses, through campaigners to members and major donors. Your recommendations and insights will enhance fundraising and the impact of these relationships both within the central charity, The Royal Society of Wildlife Trusts (RSWT) and the wider Wildlife Trusts federation.

**The Wildlife Trusts value passion, respect, trust, integrity, pragmatic activism and strength in diversity. Whilst we are passionate in promoting our aims, we are not judgmental and are inclusive. We particularly encourage applications from people who are underrepresented within our sector, including people from minority backgrounds and people with disabilities. We are committed to creating a movement that recognises and truly values individual differences and identities.**



## About You

**The Royal Society of Wildlife Trusts takes our safeguarding responsibilities extremely seriously. Please click [here](#) to read our commitment statement. RSWT is committed to safeguarding and promoting the welfare of children and adults at risk. For applicable roles, applicants must be willing to undergo checks with past employers and Disclosure and Barring Service checks at the eligible level.**

**As a Disability Confident employer, we are committed to offering an interview to anyone with a disability that meets all the essential criteria for the post. Please let us know if you require any adjustments to make our recruitment process more accessible.**

**RSWT are committed to increasing the diversity of its staff through its Levelling the Field recruitment pledge and will put any ethnic minority applicants that meet all the essential criteria for the post through to the next stage of recruitment.**

**Please do not use artificial intelligence tools to assist you to complete the application form. We may not accept applications that have been completed utilising AI tools. If you would usually use tools such as these to assist you in filling in a form, please contact [tash.stewart@iris.co.uk](mailto:tash.stewart@iris.co.uk) to discuss this further and understand other options.**

## Job Description – Overall Purpose

- **Enhance The Wildlife Trusts' income generation by providing actionable insights from our CRM data to inform fundraising strategies, relationship management and campaigns.**
- **Act as product owner for the CRM within the central charity (the Royal Society of Wildlife Trusts) and enhance RSWT's capabilities and CRM practice.**
- **Lead The Wildlife Trusts' community of practice for CRM data specialists.**
- **Deliver internal customer relationship insights to enhance partnership working within The Wildlife Trusts' federation.**

## Job Description – Main Responsibilities

- **Enhance The Wildlife Trusts' income generation by providing actionable insights from our CRM data to inform fundraising strategies, relationship management and campaigns:**
  - Analyse donor data to identify trends, patterns, and income-generation opportunities.
  - Provide actionable insights to inform fundraising strategies and campaigns.
  - Develop and maintain dashboards and reports to monitor key performance indicators (KPIs).
  - Generate income by collaborating with fundraising teams to design and evaluate initiatives, and contribute to the enhancement of supporter journeys.
  - Ensure accurate data segmentation for targeted campaigns.
  - Prepare and present detailed reports and insights to senior management and Wildlife Trust colleagues.



## Job Description – Main Responsibilities

- **Act as product owner for the CRM within the central charity (the Royal Society of Wildlife Trusts) and enhance RSWT's capabilities and CRM practice :**
  - Stay up-to-date with the latest features and functionalities of the Access Charity CRM system - and CRM technology and data management practices more broadly.
  - Work with different disciplines across RSWT to identify requirements and areas for improvement and make recommendations.
  - Be an expert in the functionality and application of Access Charity CRM; provide engaging and tailored training and support to RSWT colleagues on an ongoing basis.
  - Create documentation and other resources to support the effective use of Access Charity CRM across RSWT.
  - Ensure accuracy, completeness, and consistency of data in the CRM system; monitor data quality and integrity, working with appropriate colleagues to make necessary updates, corrections and ways of working.
  - Be an ambassador for the use of CRM across all teams, helping to embed a CRM culture within RSWT and lead the monthly CRM user group.
- **Lead The Wildlife Trusts' community of practice for fundraising CRM specialists:**
  - Run a regular informal meeting for CRM specialists in fundraising across The Wildlife Trusts' federation to come together to discuss best practice and share knowledge and solutions.
- **Deliver internal customer relationship insights to enhance partnership working within The Wildlife Trusts' federation:**
  - Identify patterns and insights within the data regarding RSWT's engagement with our federation stakeholders to inform plans to enhance our events and communication.
  - Working with our internal communications manager and data and research officer, develop dashboards to monitor the effectiveness of our internal communications and engagement activities.



## Job Description - Main Responsibilities

- **Other responsibilities:**
  - Ensure appropriate and GDPR compliant data-sharing with the Wildlife Trusts federation to better support their marketing and communications activities.
  - Be responsible for your own health and safety and that of your colleagues, in accordance with the Health and Safety at Work Act (1974) and relevant EC directives.
  - Enhance and keep up-to-date relevant areas of our intranet site as required.
  - Undertake own administration.
  - Raise purchase orders and monitor contract delivery in relation to your area of work.
  - You may be required to assist with other areas of work and therefore you should be prepared to undertake other duties appropriate to the post and any other reasonable duties required.
  - The post will require occasional travel and possible overnight stays at conferences.
- **All staff are ambassadors for the organisation both internally and externally and are expected to act in a professional manner at all times. They are required to abide by organisational rules, policies and procedures as laid down in the staff handbook, adopt environmentally friendly working practices, set and maintain high personal standards of efficiency and customer care and foster a 'can do' culture based on ownership, initiative, teamwork and exchange of information.**



## Person Specification

### Essential

- Personal Qualities:
  - Highly organised and able to flexibly manage and prioritise time and workload efficiently
  - An excellent team player, with the ability to develop good working relationships with internal and external stakeholders
- Key Competencies:
  - Expert user of CRM platforms (e.g., Access, Salesforce, HubSpot, Microsoft Dynamics)
  - Analysing complex supporter or customer data within a CRM system, identifying trends and making recommendations to inform decisions
  - Generating comprehensive reports and dashboards using CRM tools or external platforms (e.g., Power BI, Tableau)
  - Designing and automating CRM reports to track key performance indicators (KPIs)
  - Implementing robust processes to ensure CRM data integrity
  - Collaborating across departments and disciplines (e.g. marketing and fundraising), engaging others to contribute to successful team projects and enhance their CRM skills
- Experience:
  - Managing high volumes of data within the charity sector, other membership organisation or sales environment
  - Contributing data for successful income generation initiatives
  - Software integrations
  - Managing new and existing supporter journeys via integrated website and CRM systems to deliver results
- Knowledge and skills:
  - Excellent communication skills to present data insights clearly to non-technical stakeholders
  - In-depth knowledge of best practice for CRM and business intelligence data
  - Working knowledge of data protection laws (e.g., GDPR) to ensure compliance





## Person Specification

### Desirable

- Experience:
  - Developing and providing basic training for others
- Knowledge and Skills:
  - Knowledge of automating workflows and processes within the CRM
  - Knowledge of fundraising best practice, trends and legislation





## Additional benefits of working for The Wildlife Trusts

- Private medical insurance
- Electric vehicle salary sacrifice scheme
- 26 days holiday per year plus 8 bank holidays
- 4 Concessionary Days
- Non-contributory Life Assurance Scheme
- Generous pension contribution
- Charity worker discount
- Employee Assistance Programme

**Closing date for applications: 5<sup>th</sup> January 2025**

**First interview: 14<sup>th</sup> January 2025**

**Second interview: 20<sup>th</sup> January 2025**

