

## Role profile

<b>Role title</b>	<b>Business application consultant - CRM</b>
<b>Department and directorate</b>	<b>BMA Technology &amp; Digital Services</b>
<b>Job family level</b>	<b>Grade 5</b>
<b>Reports to (job title and name)</b>	<b>Head of Business Applications</b>
<b>Direct reports (job title and name)</b>	

### Summary – purpose of the role

*Describe as concisely as possible the overall purpose of the job and including the core duties/responsibilities required to be performed in the role (e.g., to provide a full range of administrative support services to the department including x,y,z)*

A CRM business application consultant has both functional and technical knowledge of Microsoft Dynamics 365 CRM and can map the client's business processes and requirements to the best practices and features of the solutions. Although the same level of experience and qualification is not required as for the CRM application, the consultant should also act as an interface between an external Microsoft NAV supplier and end user requirements.

Specific responsibilities of the role include:

- Gain complete understanding of users' business processes against the standard Microsoft Dynamics 365 CRM functionality.
- To act as the end users' agent to deliver solutions according to the end users' needs by collaborating with the applications team and the external suppliers to design, configure, integrate, test, and deploy the CRM application changes or new functionality.
- Conducting business analysis and gathering requirements from the end users
- Work with the applications team to produce high level design documents for changes to the systems.
- Work with the supplier to ensure that user stories reflect the requirements of the change requests.
- Work with the programme/project delivery office to ensure that projects are delivered within the governance of the priority framework and the delivery of the project governance.
- Collaborate with other consultants, developers, architects, and partners to deliver integrated solutions as required.
- Ensure that training, support, and documentation are available to the users for all changes.
- Provide level 2 Dynamics CRM application and NAV support; manage and progress end user incidents and service requests in accordance with the incident management process, including timely and accurate updates within Service Level Targets.
- Manage the configuration and customisation of the Microsoft Dynamics CRM 2018 application within the governance of change management processes.
- Maintain the business requirement documents handed over by the project implementation team to BAU (business as usual) teams for Service transition.
- Aid the Finance team in articulating their requirements for Navision so that the supplier can provide optimal support



- Follow up on reoccurring end user enquiries to ensure that best practice is adhered to and to minimise the number of enquiries and to promote self-service.
- Keep documentation updated, including publishing of knowledge articles, and writing policies or procedures that impact the team.
- Seek opportunities to improve service and lead on recommendations for change writing standard operating procedures.
- Ensure that end users make the best use (and best practice) of their IT (Information Technology) systems.
- Stay updated with the latest developments and trends in the CRM and NAV domains.

### Skill (level and breadth of application)

*What relevant experience is necessary to undertake this role? What specialist, technical or professional qualifications are required to be able to perform the job?*

*How far does the role extend out across the organisation, eg confined to own team, involves co-ordination with another department or requires regular negotiation with many other parts of the organisation? Why is this necessary? Describe the range of issues that are involved in this, eg resolving people's IT problems, collecting information on key research items or advising members on a particular issue.*

- Degree or higher education qualification, preferably in business, computer science, engineering or a related field, or equivalent experience and certification
- At least 5 years' experience with Microsoft Dynamics 365 CRM or other similar CRM and ERP systems
- Knowledge of Microsoft Navision 2018 application
- Certification in Microsoft Dynamics 365 CRM or other relevant technologies
- Proven knowledge of Microsoft Business Central
- Proven skills in business analysis, project management, communication, problem-solving and customer service
- Proficient with developing, deploying, customizing, and integrating Microsoft Dynamics CRM
- Understanding of Dashboards and reporting
- Proven communication skills with both internal team members and external business stakeholders
- Internally motivated, able to work proficiently both independently and in a team environment.
- Strong initiative to find ways to improve solutions, systems, and processes.
- Proven experience in agile project management methodology.
- A general understanding of business financial and accounting processes.
- An interest in how Generative AI (Artificial Intelligence) or other AI tools can be used for business process reengineering with an organisation's customer relationship management processes

### Intellectual demands (complexity and challenge)

*What sorts of problems, situations or issues are typically dealt with? Give any illustrative examples. How are the problems, situations or issues dealt with (e.g., undertaking original research and analysis or seeking specialist advice)?*

### Intellectual demands (complexity and challenge)

*To what extent are standard procedures and processes followed when undertaking typical tasks, and how is personal initiative used when solving problems? To what extent is creativity used in solving the problems (e.g., adopting different approaches, trying things that have not been done before within the organisation or improving/changing previous approaches).*

- Synthesizes complex or diverse information; collects and researches data; uses intuition and experience to complement data.
- Ability to deliver solutions that meet the business requirements within given timescales, updating workflows and procedures as required. Document business processes arising from new and updated systems.
- Ability to communicate technical details of solutions in formats and descriptions which cater for audiences with limited technical knowledge.
- Ability to design and develop the system which holds sensitive personal data and confidential information.
- Working across a mix of complex parallel developments
- Aligns work with the directorate and organisation's strategic goals.

### Judgement (independence and level and impact limitations)

*What are the typical decisions that are made in the job without reference to any higher authority? What informs/constrains the decisions (e.g., expenditure limits, have to follow clearly laid down procedures or working within broad objectives). What influence upon policy, procedures or resources is there (e.g., giving advice to others)?*

*Who (or what) is next to be affected by the decisions that are made – for example, supervisor sees them before they leave the team or the whole department sees and has to respond to the change that is made. Give typical example(s) of the consequences of the decisions (e.g., what impact does the decision-making have on the performance of the team/section/department/organisation)?*

- Identifies and resolves problems in a timely manner; gathers and analyses information skilfully; develops alternative solutions; works well in group problem solving situations; uses reason even when dealing with emotional topics.
- To ensure that deployments are successfully applied through the testing and live environments.
- To support service transition handover of all new functionality, creating service Introduction documentation as needed.
- Ability to assess priorities in accordance with the directorate's priority framework.
- Ability to suggest, research and implement improvements and solutions.
- Demonstrates accuracy and thoroughness; looks for ways to improve and promote quality; applies feedback to improve performance; monitors own work to ensure quality.

### Use of resources (supervision of resources and influence)

*What responsibility is there for managing people, equipment, budgets, resources, customer's welfare or confidential information? If this is a staff management role describe what is involved, eg staff reporting, staff development, appraisal, leading a department or the allocation of work.*

*How does the role fit within the organisation, eg support role, team member, team leader, specialist policy adviser, or leading major areas of core business?*

- To plan own workload in conjunction with Line Manager.
- Ability to manage the sensitive personal data and confidential information.

### Communication (level, internal and external demands and significance)

*What people are typically contacted (regardless of the medium) **inside** the Association, eg immediate colleagues, senior managers or administrators? Committee members are the only members classed as internal communication. Normal non-committee membership and doctors are external (see below)*

*Who is in regularly contact with the role holder **outside** of the Association, eg members who are not committee members, suppliers, members of the public? Approximately what percentage of the time is spent on external communications?*

*What is the purpose of these contacts, eg conveying information, gathering data?*

- Communicate on complex business analysis issues, technical solutions and business process change at all levels.
- Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration regardless of their status or position; accepts responsibility for own actions; follows through on commitments.
- Proven ability to work as part of a team.
- To liaise with the other teams on collaborative projects involving interfacing of the technologies on both technical and business process matters
- Communicate with providers of third-party services and applications and liaise directly them.
- Strong written communication skills required to produce documents read by various departments and employees of different levels (e.g., user stories, requirements documents, functional specifications, technical specifications, user manuals, test plans, training materials, technical documentation, use case diagrams, etc.).
- Attend external, and internal, virtual meetings.

### Physical demands & coordination (physical effort and mental strain)

*Are there any unusual physical or mental demands of the role; for example, lifting heavy objects, standing for long periods, using VDUs extensively or high levels of concentration?*

- Normal coordination or physical demands associated with an office environment.
- Extensive use of VDUs and high level of concentration.

### Working conditions and emotional demands)

*What are the environmental conditions in which the work is conducted, the social and emotional demands faced by the role and the pressures resulting from these?*

- The job is conducted in a normal office environment and is not exposed to hazardous conditions or anti-social behaviour.
- The role contains minimal personal risk.
- The role is hybrid with a requirement to attend the office for 2 days per week.

BMA competency level required

The postholder is expected to execute their role in line with our five organizational values. These are currently being translated into behavioral indicators that will form part of our new performance management process. The following examples illustrate how we are using our values to inform how we act:

- We are **leaders** because:
  - We strive to always improve.
  - We take responsibility for our actions.
  - We collaborate with each other and work as one BMA for the good of our members.
  - We are proactive and prepared to guide our members and each other.
- We are **experts** because:
  - We understand our members
  - We draw on our collective experience and knowledge to solve problems.
  - We use our insights and research to make decisions.
  - We provide accurate, credible, relevant and engaging information.
  - We recognise our strengths and act upon them.
- We are **committed** because:
  - We listen to our members and put them at the heart of everything we do.
  - We are respectful, inclusive, open and honest with our members and each other.
  - We approach everything we do with confidence and sensitivity.
- We are **reliable** because:
  - We deliver on what we say we will do.
  - We are accessible and approachable.
  - We build trust by being consistent and supportive.
  - We are positive and decisive whatever the situation.
- We are **challenging** because:
  - We fight, ethically and fearlessly, for the interests of all our members.
  - We work as a brave, assertive and effective champion for high quality health. services and the advancement of the profession.

Sign-off

Manager:

Date:

Role holder:

Date: