

## CITY OF HAMILTON

**CORPORATE SERVICES DEPARTMENT**  
**(CUSTOMER SERVICE & PROVINCIAL OFFENCES ADMINISTRATION – BUSINESS & SUPPORT SERVICES**  
**– LOCATION – 71 MAIN ST. W.)**

**CRM SOLUTIONS ANALYST (CUSTOMER CONTACT CENTRE)**

**SUMMARY OF DUTIES**

Reporting to the Manager, Business & Support Services, this position manages the customer relationship management (CRM) and Knowledge Management (KM) software applications as well as provides quality assurance and process enhancement support and advice. The primary role is to be responsible for effective configuration of the CRM and KM platform for optimal use and user experience. This position is the primary functional liaison between the CCC and the City's resources which include IT/Hansen/Amanda/City Works/GIS Development team, and CRM vendor support. The incumbent is responsible for designing and implementing customer relationship management (CRM) and Knowledge Management (KM) performance measurement strategies and executive reporting on service performance as well as gap analysis and recommendations. Performance analysis includes quantitative measures related to the usage, service quality, service level agreements, operational performance (inclusive of staffing levels) and cost-effectiveness.

The position requires in-depth knowledge of the CRM/KM software in support of business requirement analysis, design development, user testing, implementation and deployment to IT resources responsible for server support, system integration and development efforts. The position assists to acquire, develop, manage and maintain service areas' information in the KM system in cooperation with Knowledge Management Liaisons in the CCC.

**GENERAL DUTIES**

Manages the day-to-day operational functionality and performance of the customer relationship management (CRM) and Knowledge Management (KM) software applications as well as provides support to the management of applicable back-up support systems (that supports business continuity).

Reviews and analyzes existing customer service systems and identifies potential process and system configuration changes required to meet business needs and leverage capabilities of the CRM and KM system as well as best practices in inbound call centre operations. Works with the CCC Management team, and Knowledge Management Liaisons to gather business requirements from other workgroups and emerging trends in digital customer service.

Converts business requirements related to CRM/KM into functional and technical requirements as well as develops and execute reports or queries from the CRM and KM systems, provides in-depth analysis as well as interpretation and presentation of performance data for phone and email channels at the Contact Centre. Conducts analysis of results, including review of individual staff performance results, and based on analysis, makes recommendations to management which may impact staff resources and skill requirements.

Designs, tests, troubleshoots, implements and maintains system configuration to ensure the CRM and KM systems meet City needs, focusing on usability and customer service improvements and seeking ways to support future digital service delivery.

Develop analytical tools to monitor the performance and quality of service delivery for departments and divisions as well as provides support to the BSS team (when required). Provides advice to management and applicable stakeholders on performance improvement opportunities within the CCC and across various departmental platforms.

Collaborates with other departments on development and implementation of system development / enhancements aimed at service improvements, operational efficiencies, cost savings and increased system integration which impact the CRM / KM system.

Reviews system patches, upgrades and makes recommendations on applicability and implementation. Participates in review of product enhancements/upgrades as well as be aware of, and investigate, new product

developments impacting CRM/KM, and make recommendations to Manager, Contact Centre on future developments.

Oversees the effective management and resolution of issues/problems (either in-system or across applications) related to the CRM/KM as well as ensures risks are identified and mitigated to foster business and performance continuity.

In partnership with internal clients and Knowledge Management Liaisons, is responsible for the development and documentation of the processes and information required for service delivery by Customer Service Representatives to the citizens of Hamilton through the CRM/KM.

Prepare training and presentation materials and facilitate both training and continuous improvement feedback sessions with Customer Service Representatives on new and changing processes in conjunction with sensational service objectives.

Manages the escalation of any CRM/KM issues, ensuring they are identified, tracked, resolved and that solutions are both effective and sustainable.

Develops relationships with other leading municipalities' knowledge base and CRM technical counterparts in order to share, obtain information and benchmark success.

Prepare presentations and software demonstrations to various stakeholders on CRM/KM capabilities.

Works in accordance with the provisions of applicable Health and Safety legislation and all City of Hamilton corporate and departmental policies and procedures related to Occupational Health and Safety.

Perform other responsibilities as assigned which are directly or indirectly related to the normal functions of this position.

## **QUALIFICATIONS**

1. Developed knowledge and experience in Customer Relationship Management/Knowledge management technologies normally acquired through the completion of a relevant degree in, Business, , Computer science or a combination of relevant work experience. . Prior experience managing technical or process improvement projects required.
2. Considerable years of experience in CRM and KM Configuration within a customer service environment, including Dynamics 365, Microsoft Power Apps, Verint, Sales Force is required
3. Considerable customer service experience with preference given to those who have worked in a customer service environment such as an inbound call centre.
4. Demonstrated ability to write, interpret and modify XML, XLS, HTML, and CSS, SQL and RESTful Services in support of purchased software packages. An understanding of SQL coding.
5. Demonstrated experience in project or process improvement management. Demonstrated practical experience working with user centered design and development of CRM/KM configurations. Demonstrated knowledge of analytics, performance analysis and reporting using Power BI.
6. Previous experience in innovation and process improvements. Demonstrated examples of changing status quo for improved ways of operating, including practical experience working with user-centred design approach to design and development of CRM/KM configurations.
7. Strong verbal and written communication skills with the ability to relate effectively and tactfully with peers, all levels of management, elected officials and customers. Ability to adjust communication style based on audience, for example, describing technical matters to those who may not have technical expertise.
8. Experience with knowledge management practices (authoring, updating workflows, version control and managing user feedback mechanisms) used in one or more service delivery channels.

9. Experience extracting information, identifying and trouble-shooting problems. Must be able to handle multiple changing priorities and work on multiple concurrent assignments.
10. Demonstrated knowledge of analytics, and performance analysis.
11. Experience training adult learners including; curriculum preparation, presentation and evaluation
12. Proven organizational skills and the ability to work under very tight deadlines and with competing priorities
13. Knowledge of legislation and standards relevant to the position – Municipal Freedom of Information and Protection of Privacy Act (MFIPPA), Occupational Health and Safety Act (OHSA), and Accessibility for Ontarians with Disabilities Act AODA.
14. Advanced experience working in a computerized environment with working knowledge of Microsoft Windows 11, and the current suite of Microsoft productivity tools (Word, Excel and PowerPoint) including Dynamics and Power Apps. Ability to adapt to new computer applications. Preference given to those with experience using municipal business unit software including Hansen, Amanda, Vailtech and GIS.
15. May be required to travel to meetings off site.

**THE INCUMBENT SHALL COMPLY WITH ALL HEALTH AND SAFETY POLICIES AND PRACTICES FOR THIS POSITION AND THE WORKPLACE.**

\*\*\*\*\*