

## CITY OF HAMILTON

### **CORPORATE SERVICES DEPARTMENT (CUSTOMER SERVICE, PROVINCIAL OFFENCES ADMINISTRATION & FINANCIAL INTEGRATION – BUSINESS & SUPPORT SERVICES – LOCATION - 330 WENTWORTH ST. N.)**

#### **CUSTOMER RELATIONSHIP MANAGEMENT SPECIALIST - BUSINESS & SUPPORT SERVICES**

##### **SUMMARY OF DUTIES**

Reporting to the Manager, Business & Support Services (BSS), this position manages and maximizes the customer relationship data and the solution utilizing Microsoft D365 and Power Pages. The primary role is to be the liaison between employees and the solution. This role affects service delivery, customer service and brand image. Responsible to successfully find ways to optimize the solution to meet the changing needs of services and expectations of customers. This role requires analytical, communication, organization and collaboration skills. The incumbent is responsible for designing and implementing changes to the solution including 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 Microsoft D365 and Power Pages 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.

##### **GENERAL DUTIES**

Manages the day-to-day operational functionality and performance of the customer relationship management solution as well as provides support to the management of applicable back-up support systems (that supports business continuity). Acts as a point-of-resource to internal stakeholders relating to customers and the CRM solution.

Reviews and analyzes existing solution and identifies potential process and system configuration changes required to meet changing needs and leverage best practices and updates. Works to gather business requirements from stakeholders and emerging trends in customer service. Maximizes characteristics and benefits of the CRM solution.

Converts business requirements related to CRM into functional and technical requirements as well as develops and executes reports or queries from the CRM, provides in-depth analysis as well as interpretation and presentation of data. 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, builds and refines workflows using the platform inclusive of Journey and process mapping that support internal and external campaigns and ongoing requests from the business.

Designs, tests, troubleshoots, implements and maintains system configuration to ensure the CRM meet changing needs, focusing on usability and customer service improvements and seeking ways to support future digital service delivery. Understand and help facilitate role-based access requirements, adhering to a just-right methodology to also protect the data of our customers and stakeholders.

Develops analytical tools to monitor the performance and quality of service delivery for departments and divisions.

Provides advice to management and applicable stakeholders on performance improvement opportunities across the enterprise. Customizes reports from the CRM.

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. Works with different services to enhance customer service, service delivery, and marketing/events based on the CRM data. Creates, deploys and maintains pages that promote new programs, advertised assets, service/product lines and other campaign initiatives. Collaborates with cross-functional teams to coordinate featured assets and content. Supports the implementation of automated journeys for multiple audiences to cultivate relationships and enhance communications with active and customers. Works collaboratively to understand business and customer needs and advise on industry best practices and standards related to customer relationship management.

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. Makes recommendations to Manager, Contact Centre on future developments. Ensures the CRM's data is accurate and reliable. Supports digital acquisition and data capture strategies, as well as audience list and database management and integrations.

Oversees the effective management and resolution of issues/problems (either in-system or across applications) related to the CRM as well as ensures risks are identified and mitigated to foster business and performance continuity. Troubleshoots solution errors. Ability to assist in trouble shooting of ad hoc issues. Escalates reoccurring technical issues to the relevant support teams.

Prepares training and presentation materials and facilitate both training and continuous improvement feedback sessions with stakeholders on new and changing processes in conjunction with sensational service objectives. Organizes and holds training sessions on processes for all roles to increase efficiency of usage. Conducts user workshops. Conducts user testing and upgrades CRM solution.

Develops relationships with other leading municipalities' knowledge base and CRM technical counterparts in order to share, obtain information and benchmark success. Be an advocate for the platform and contributes to knowledge sharing.

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 understanding and experience in customer relationship management and technologies normally acquired through the completion of a relevant degree in computer science, information systems, or another related field or a combination of relevant work experience.
2. Microsoft Dynamics 365 Fundamentals (CRM) Certification.
3. Ability to think critically, identify solutions and deliver recommendations based on data and analysis.
4. Extensive experience in Microsoft D365 and Power Pages is required.
5. Extensive customer service experience with preference given to those who have worked in the public sector.
6. Intermediate knowledge of HTML, CSS, SQL and/or AMPscript, RESTful Services.
7. 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 configurations.

8. 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.
9. Experience with knowledge management practices (authoring, updating workflows, version control and managing user feedback mechanisms) used in one or more service delivery channels.
10. Experience extracting information, identifying and trouble-shooting problems. Must be able to handle multiple changing priorities and work on multiple concurrent assignments.
11. Demonstrated knowledge of analytics, and performance analysis.
12. Experience training adult learners including; curriculum preparation, presentation and evaluation.
13. Must be able to work independently and be team-oriented, reliable and dependable.
14. Strong initiative, creative thinking, attention to detail and work ethic
15. Proven organizational skills and the ability to work under very tight deadlines and with competing priorities.
16. 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.
17. Advanced experience working in a computerized environment with working knowledge of Microsoft Windows 11, and the current suite of Microsoft productivity tools (Teams, Word, Excel and PowerPoint). Ability to adapt to new computer applications. Preference given to those with experience using municipal business unit software including Hexagon, Xplor, Amanda, Vailtech and GIS.
18. 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.**

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