# Role Description
# Assistant Client Engagement CRM Analyst

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| **Cluster** | Regional NSW |
| **Agency** | Department of Regional NSW |
| **Group/Division/Branch** | NSW Public Works and Soil Conservation Service |
| **Location** | Regional NSW |
| **Role Family** | Standard / Communication and Engagement / Support |
| **Classification/Grade/Band** | Clerk Grade 5/6 |
| **ANZSCO Code** | 262111 |
| **PCAT Code** | 1119192 |
| **Date of Approval** | February 2023 |
| **Agency Website** | www.drnsw.nsw.gov.au or www.publicworks.nsw.gov.au |

## Agency overview

The Department of Regional NSW was formed in 2020 as a central agency for regional issues. The Department is responsible for building resilient regional economies and communities, strengthening primary industries, managing the use of regional land, overseeing the state's mineral and mining resources and ensuring government investment in regional NSW is fair and delivers positive outcomes for local communities and businesses.

NSW Public Works is part of the Department of Regional NSW and supports local and state government agencies to deliver critical infrastructure initiatives by providing expert advisory, planning, design, delivery and support services. There's nothing abstract about what we do. Just look around. Our work is in the hospitals, dams, water treatment plants and high schools – the real foundations of prosperous communities. Every day we help shape the ambitious projects that bring progress to more people in NSW. From forging a more sustainable relationship with the land around us, to engineering the big ideas of the future. In every challenge we see the chance to build stronger and more connected communities. We do this by developing solutions that show creativity and grassroots ingenuity, providing impartial advice and support at all levels of government and the private sector, and partnering with experts to maximise the benefits of our knowledge and experience.

In NSW Public Works offices all over the state, you'll find local expertise for local issues. We uncover the best talent, scrutinise cost and risk, and bridge the gap between private sector and government. By managing these nuances, projects we work on don't just get done, they become benchmarks others aspire too.

## Primary purpose of the role

The Assistant Client Engagement CRM Analyst ensures that NSWPW's CRM data is accurate and complete, reports and dashboards are fit-for-purpose and easily accessible and understood across the organisation, and workflows and automations are configured in a way that enables the front line staff to better service their clients in a coordinated "One-NSWPW" fashion.

## Key accountabilities

- Ensure data integrity and accuracy – act as the businesses lead CRM data custodian, continuously monitoring and improving data quality
- Coordinate and collaborate with the Client Engagement team, vendor and implementation partner to roll out and improve the platform
- Collaborate with the Manager, contribute to campaign, segment strategies, and customer interactions across direct and intermediate channels
- Working with service delivery leads, plan and design business dashboards and reporting tools used for generating actionable insight; noting some reporting will form part of Senior Sales and Executive meetings
- Guide the business on CRM operating efficiencies and best practices, and be available and known in the business to support front line staff's questions and resolve issues
- Relinquish current staff from their duties of maintaining manual reports that the business elects to fold into the CRM platform, including sales pipeline planning
- Respond to ad hoc report requests for information in a timely manner
- Support deeper adoption of the system via the facilitation of workshops and training sessions with CRM users.

## Key challenges

- Prioritising the daily workload and providing an efficient turnaround service given that the position works across the unit and there may be competing priorities between different areas.
- Assisting with the implementation of new tools across a geographically dispersed business working under a matrix reporting structure
- Maintaining CRM data quality in a challenging environment with constant change.

## Key relationships

| Who | Why |
|---|---|
| **Internal** | |
| Manager | - Receive guidance and direction on specific tasks to be completed including priorities<br>- Discuss work allocated, providing updates on key issues and process.<br>- Escalate issues as appropriate |
| Team Members | - Interact with and work collaboratively to achieve Authority outcomes<br>- Share information and discuss solution to problems with colleagues |
| **External** | |
| Contractors | - Coordinate outsourced external services |

## Role dimensions

**Decision making**

- Works independently within the constraints of relevant strategies, policies, procedures and legislation
- Determines its own priorities in consultation with Manager and broader team
- Makes recommendations to improve processes and standards.

**Reporting line**

Manager Marketing & Communications

**Direct reports**

Nil

**Budget/Expenditure**

Nil

## Key knowledge and experience

- Experience proactively sourcing content from and working with a complex range of geographically disperse internal stakeholders.
- Experience with SAP HANA, Microsoft Dynamics, Power BI favourable
- Strong proficiency in SQL and modern APIs and coding languages favourable
- Experience working directly with a marketing function supporting and monitoring targeted campaigns
- Highly experienced in developing reporting dashboards for sales teams and management
- Highly proficient in Hubspot Sales and Marketing modules
- Demonstrated experience in a data administrator role particularly a sales environment or function
- Detail-oriented approach with the ability to multi-task.

### Capabilities for the role

The NSW public sector capability framework describes the capabilities (knowledge, skills and abilities) needed to perform a role. There are four main groups of capabilities: personal attributes, relationships, results and business enablers, with a fifth people management group of capabilities for roles with managerial responsibilities. These groups, combined with capabilities drawn from occupation-specific capability sets where relevant, work together to provide an understanding of the capabilities needed for the role.
The capabilities are separated into focus capabilities and complementary capabilities

### Focus capabilities

*Focus capabilities* are the capabilities considered the most important for effective performance of the role. These capabilities will be assessed at recruitment.

The focus capabilities for this role are shown below with a brief explanation of what each capability covers and the indicators describing the types of behaviours expected at each level.

## Focus capabilities

| Capability group/sets | Capability name | Behavioural indicators | Level |
|---|---|---|---|
| Personal Attributes | **Act with Integrity**<br>Be ethical and professional, and uphold and promote the public sector values | • Represent the organisation in an honest, ethical and professional way<br>• Support a culture of integrity and professionalism<br>• Understand and help others to recognise their obligations to comply with legislation, policies, guidelines and codes of conduct<br>• Recognise and report misconduct and illegal and inappropriate behaviour<br>• Report and manage apparent conflicts of interest and encourage others to do so | Intermediate |
| Relationships | **Communicate Effectively**<br>Communicate clearly, actively listen to others, and respond with understanding and respect | • Tailor communication to diverse audiences<br>• Clearly explain complex concepts and arguments to individuals and groups<br>• Create opportunities for others to be heard, listen attentively and encourage them to express their views<br>• Share information across teams and units to enable informed decision making<br>• Write fluently in plain English and in a range of styles and formats<br>• Use contemporary communication channels to share information, engage and interact with diverse audiences | Adept |
| Relationships | **Commit to Customer Service**<br>Provide customer-focused services in line with public sector and organisational objectives | • Focus on providing a positive customer experience<br>• Support a customer-focused culture in the organisation<br>• Demonstrate a thorough knowledge of the services provided and relay this knowledge to customers<br>• Identify and respond quickly to customer needs<br>• Consider customer service requirements and develop solutions to meet needs<br>• Resolve complex customer issues and needs<br>• Cooperate across work areas to improve outcomes for customers | Intermediate |

| | **Work Collaboratively** Collaborate with others and value their contribution | • Encourage a culture that recognises the value of collaboration | Adept |
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| | | • Build cooperation and overcome barriers to information sharing and communication across teams and units | |
| | | • Share lessons learned across teams and units | |
| | | • Identify opportunities to leverage the strengths of others to solve issues and develop better processes and approaches to work | |
| | | • Actively use collaboration tools, including digital technologies, to engage diverse audiences in solving problems and improving services | |
| | **Plan and Prioritise** Plan to achieve priority outcomes and respond flexibly to changing circumstances | • Understand the team and unit objectives and align operational activities accordingly | Intermediate |
| | | • Initiate and develop team goals and plans, and use feedback to inform future planning | |
| | | • Respond proactively to changing circumstances and adjust plans and schedules when necessary | |
| | | • Consider the implications of immediate and longer-term organisational issues and how these might affect the achievement of team and unit goals | |
| | | • Accommodate and respond with initiative to changing priorities and operating environments | |
| | **Think and Solve Problems** Think, analyse and consider the broader context to develop practical solutions | • Identify the facts and type of data needed to understand a problem or explore an opportunity | Intermediate |
| | | • Research and analyse information to make recommendations based on relevant evidence | |
| | | • Identify issues that may hinder the completion of tasks and find appropriate solutions | |
| | | • Be willing to seek input from others and share own ideas to achieve best outcomes | |
| | | • Generate ideas and identify ways to improve systems and processes to meet user needs | |

| | Technology | • Demonstrate a sound understanding of technology relevant to the work unit, and identify and select the most appropriate technology for assigned tasks | Intermediate |
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| | Understand and use available technologies to maximise efficiencies and effectiveness | | |
| | | • Use available technology to improve individual performance and effectiveness | |
| | | • Make effective use of records, information and knowledge management functions and systems | |
| | | • Support the implementation of systems improvement initiatives, and the introduction and roll-out of new technologies | |

## Complementary capabilities

*Complementary capabilities* are also identified from the Capability Framework and relevant occupation-specific capability sets. They are important to identifying performance required for the role and development opportunities. Note: capabilities listed as 'not essential' for this role are not relevant for recruitment purposes however may be relevant for future career development.

| Capability group/sets | Capability name | Description | Level |
|---|---|---|---|
| Personal Attributes | Display Resilience and Courage | Be open and honest, prepared to express your views, and willing to accept and commit to change | Foundational |
| Personal Attributes | Manage Self | Show drive and motivation, an ability to self-reflect and a commitment to learning | Intermediate |
| Personal Attributes | Value Diversity and Inclusion | Demonstrate inclusive behaviour and show respect for diverse backgrounds, experiences and perspectives | Foundational |
| Relationships | Influence and Negotiate | Gain consensus and commitment from others, and resolve issues and conflicts | Intermediate |
| Results | Deliver Results | Achieve results through the efficient use of resources and a commitment to quality outcomes | Foundational |
| Results | Demonstrate Accountability | Be proactive and responsible for own actions, and adhere to legislation, policy and guidelines | Foundational |
| Business Enablers | Finance | Understand and apply financial processes to achieve value for money and minimise financial risk | Foundational |
| Business Enablers | Procurement and Contract Management | Understand and apply procurement processes to ensure effective purchasing and contract performance | Foundational |

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| | Project Management | Understand and apply effective planning, coordination and control methods | Intermediate |
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