

Role Profile

Details	
Job Title:	CRM Support Officer
Job Grade:	Officer
Reports to:	CRM Product Owner
Based in:	Harrogate, North Yorkshire
Hours:	Full time, 37 hours per week
Overall purpose	
The CRM Support Officer is responsible for providing first-line support for the charity's CRM system, ensuring users receive timely, effective assistance and guidance. Acting as a key point of contact for CRM users, the postholder will troubleshoot routine issues, manage support requests, maintain support documentation and promote best practice use of the CRM across the charity. Working closely with the CRM Product Owner, Digital and Data teams, and business Subject Matter Experts (SMEs), the role will support user adoption, continuous improvement and the successful delivery of CRM enhancements and system updates. The role holder will also be responsible for internal communications and website maintenance.	
Key responsibilities	
User and System Support • Act as the first point of contact for CRM-related queries, incidents and service requests. • Troubleshoot and resolve routine CRM issues in a timely manner. • Escalate complex or technical issues to the CRM Product Owner or appropriate technical specialist or third party. • Monitor support requests and keep users informed of progress and resolution. • Ensure all incidents, requests and support activities are accurately recorded within the service desk system. • Monitor integrations and support imports. • Support testing and validation of fixes and enhancements where required. User Engagement and Adoption • Support the implementation and rollout of CRM enhancements, new functionality and system updates. • Provide guidance and assistance to users on CRM processes and functionality. • Promote effective and consistent use of the CRM across the charity. • Signpost users to appropriate guidance, training materials and self-service resources. • Support the onboarding of new CRM users, providing training where required. • Run one to one basic training sessions for CRM users and create training material and user guides.	

Knowledge Management

- Create, maintain and improve CRM knowledge articles, user guides and frequently asked questions.
- Produce training and other material in different formats to support the circumstances.
- Identify recurring issues and contribute to the development of solutions and preventative measures.
- Ensure support documentation remains current, accurate and accessible.
- Maintain the CRM internal website.
- Capture user feedback to inform future improvements.

Continuous Improvement

- Analyse support trends and common issues to identify opportunities for improvement.
- Support the development and refinement of CRM support processes and procedures.
- Work with colleagues across the organisation to improve user experience and CRM adoption.
- Prepare and send internal communications and surveys.
- Contribute to reporting on support performance and service effectiveness.

General Responsibilities

- Work in accordance with the charity's policies, procedures and values.
- Maintain confidentiality and ensure compliance with data protection requirements.
- Liaison with the Digital team regarding internal technical issues and issues requiring Redcentric.
- Undertake any other duties commensurate with the level of the role.

Qualifications

Essential

- Educated to A-Level standard or equivalent experience.

Desirable

- Relevant qualification in IT, Business Systems, Customer Services or related discipline.
- Service Desk or ITIL Foundation qualification.

Knowledge and experience

- Experience of providing support for business systems, CRM platforms or service desk functions.
- Experience of Microsoft Dynamics 365 or another enterprise CRM platform.
- Experience of supporting CRM system users within a charity or not-for-profit organisation.
- Experience of using a service management or ticketing system.
- Strong troubleshooting and problem-solving skills.
- Experience of creating and maintaining user guides, knowledge articles or support documentation.

- Experience of and a good understanding of GDPR principles.
- Understanding of CRM data quality, governance and user adoption principles.
- Experience of supporting system upgrades, releases or testing activities.

Skills and abilities

- Excellent customer service skills and a user-focused approach.
- Ability to explain technical information clearly to non-technical audiences.
- Strong written and verbal communication skills.
- Excellent organisational, time-management and coordination skills, with strong attention to detail.
- Ability to manage and prioritise multiple requests effectively.
- Proficient in Microsoft Office applications, including Word, Excel and PowerPoint.
- Proactive and able to work independently without supervision.
- Able to act as a visible and approachable point of contact for colleagues navigating the CRM change.
- Able to explain complex systems or processes in simple, accessible terms.
- Awareness of IT service management principles.

Other requirements

- A willingness to complete our pre-employment checks (to be undertaken once the role is offered and accepted) which include:
 - A check on your employment history by seeking two references
 - A check on your eligibility to work in the UK as per the Immigration, Asylum and Nationality Act 2006
 - A check on your highest educational achievement(s)
 - A check on your professional qualification(s)
 - A DBS check at the level relevant to your role.
 - Satisfactory completion of a pre-employment health assessment. If needed, you will also be required to undergo a medical assessment (at the charity's expense) by a medical practitioner of the charity's choosing.

DBS Check Level

- This role requires a DBS check at basic level.

Values and Behaviours

- Passionate about the values of Yorkshire Cancer Research (see 'Our Values' below).
- Safeguarding is the responsibility of all employees who must remain aware and vigilant to potential safeguarding breaches and always report any suspicions or incidents following our internal reporting guidelines which will be shared during induction.
- Yorkshire Cancer Research operates a strict 'no smoking' policy throughout our premises, car parks and vehicles. Staff must not smoke whilst wearing charity branded clothing or whilst on duty. If the post holder chooses to, the charity will help and support them to stop completely or temporarily abstain from smoking during their working hours.



Our Values & Behaviours

Our Values



Our Behaviours

	Behaviours
Here for Yorkshire	The needs of people in Yorkshire come first Yorkshire Cancer Research exists to prevent diagnose and treat cancer in Yorkshire. The needs and interests of people in Yorkshire are at the forefront of what we do, how we think and how we act. People are the heart of everything we do When we develop new plans, projects and activities, we actively seek patient, supporter and/or customer input to inform our approach and decision-making.
United by the Cause	United by the need to <i>Give Yorkshire More Life to Live</i>

	We are transparent and open in what we do and what we say, uniting to support one another in achieving our shared goals. We collaborate with each other and other organisations We work to build relationships based on trust and collaboration. We seek to understand the needs and objectives of others to establish the common ground and agree how we can work together to benefit people in Yorkshire.
Think Big and Bold	We deliver world-leading research and services We evaluate worldwide research and we test and we learn in order to drive the greatest advances and impact in cancer research and services. We promote a culture of continual improvement and innovation. We dare to think differently to Give Yorkshire More Life To Live We are ambitious and not afraid to try something new or difficult when it comes to achieving our goals. Nor are we afraid to make difficult decisions when they are in the best interests of those we exist to serve; the people of Yorkshire.
Making it Happen	We create and build solutions We are focused on understanding the impact of our work and the difference it is making. We ensure we are always pushing forward the achievement of our charity's vision. We approach our work with positivity, energy and drive We see every challenge as an opportunity to provide a solution. When it comes to preventing, diagnosis and treating cancer, we deliver pioneering solutions <i>To Give Yorkshire More Life To Live</i>. We pursue our goals with enthusiasm and commitment; always asking 'Can I, and can we, do more?'.

YORKSHIRE CANCER RESEARCH

Job Applicant Privacy Notice

Data controller: Yorkshire Cancer Research (the Charity)

As part of any recruitment process, the Charity collects and processes personal data relating to job applicants. The Charity is committed to being transparent about how it collects and uses that data and to meeting its data protection obligations.

What information does the Charity collect?

The Charity collects a range of information about you. This includes but is not limited to:

- your name, address and contact details, including email address and telephone number;
- details of your qualifications, skills, experience and employment history;
- information about your current level of remuneration, including benefit entitlements;
- whether or not you have a disability for which the organisation needs to make reasonable adjustments during the recruitment process;
- information about your entitlement to work in the UK; and
- equal opportunities monitoring information, including information about your ethnic origin, sexual orientation, health and religion or belief.

The Charity collects this information in a variety of ways. For example, data might be contained in application forms, CVs or resumes, obtained from your passport or other identity documents, or collected through interviews or other forms of assessment, including online tests.

The Charity will also collect personal data about you from third parties, such as references supplied by former employers, information from employment background check providers and information from criminal records checks. The Charity will seek information from third parties only once a job offer to you has been made and will inform you that it is doing so.

Data will be stored in a range of different places, including on your application record, in HR management systems and on other IT systems (including email).

Why does the Charity process personal data?

The Charity needs to process data to take steps at your request prior to entering into a contract with you. It also needs to process your data to enter into a contract with you.

In some cases, the Charity needs to process data to ensure that it is complying with its legal obligations. For example, it is required to check a successful applicant's eligibility to work in the UK before employment starts.

The Charity has a legitimate interest in processing personal data during the recruitment process and for keeping records of the process. Processing data from job applicants allows the Charity to manage the recruitment process, assess and confirm a candidate's suitability for employment and decide to whom to offer a job. The Charity may also need to process data from job applicants to respond to and defend against legal claims.

Where the Charity relies on legitimate interests as a reason for processing data, it has considered whether or not those interests are overridden by the rights and freedoms of employees or workers and has concluded that they are not.

The Charity processes health information if it needs to make reasonable adjustments to the recruitment process for candidates who have a disability. This is to carry out its obligations and exercise specific rights in relation to employment.

Where the Charity processes other special categories of data, such as information about ethnic origin, sexual orientation, health or religion or belief, this is for equal opportunities monitoring purposes.

The Charity is obliged to seek information about criminal convictions and offences. Where the Charity seeks this information, it does so because it is necessary for it to carry out its obligations and exercise specific rights in relation to employment.

If your application is unsuccessful, the Charity will keep your personal data on file in case there are future employment opportunities for which you may be suited. The Charity will ask for your consent before it keeps your data for this purpose, and you are free to withdraw your consent at any time.

How we use AI in the recruitment process

We use AI based tools to assist with parts of the recruitment process. The tool may:

- Review applications for matches to essential and desirable criteria
- Analyse key words, skills, qualifications or experience
- Rank or score applications
- Identify where candidates indicate they do not meet essential requirements (e.g., answering 'No' to mandatory questions) and flag such applications for filtering

If the role requires specific mandatory skills or qualifications, the AI tool may:

- Automatically flag or filter candidates who have indicated they do not meet those essential requirements
- Present filtered applications separately for review
- Recommend that such applications do not proceed

A human decision maker will remain involved at all stages of the recruitment process. We do not make final recruitment decisions based solely on AI and the recruitment team examine all AI recommendations before any application is progressed or rejected.

We use AI tools to:

- Increase consistency and fairness in screening
- Manage high volumes of applications efficiently
- Help identify applicants who meet the essential criteria for the role
- Reduce human error and unconscious bias
- Support (but not replace) human decision making

To ensure fairness and protect your rights, we apply the following safeguards to any AI assisted decisions:

- AI outputs are always reviewed by human decision makers
- All candidates may request human intervention or contest AI influenced decisions
- We regularly assess AI tools for accuracy and bias
- We maintain transparency regarding what the tools do and don't do.
- Essential criteria used for filtering are clearly set out in the job description or application form

Who has access to data?

Your information will be shared internally for the purposes of the recruitment process. This includes members of the HR and senior executive teams, interviewers involved in the recruitment process, managers in the Charity's team with the vacancy and IT staff if access to the data is necessary for the performance of their roles.

The Charity will not share your data with third parties, unless your application for employment is successful and it makes you an offer of employment. The Charity will then share your data with former employers to obtain references for you, employment background check providers to obtain necessary background checks and the Disclosure and Barring Service to obtain necessary criminal records checks.

The Charity will not transfer your data outside the United Kingdom.

How does the Charity protect data?

The Charity takes the security of your data seriously. It has internal policies and controls in place to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by our employees in the proper performance of their duties. The Charity has a Data Protection Policy and an ICT Acceptable Use Policy which apply to all its employees.

For how long does the Charity keep data?

If your application for employment is unsuccessful, the Charity will hold your data on file for 6 months after the end of the relevant recruitment process. If you agree to allow the organisation to keep your personal data on file, the Charity will hold your data on file for a further period of 6 months for consideration for future employment opportunities. At the end of that period or once you withdraw your consent, your data is deleted or destroyed.

If your application for employment is successful, personal data gathered during the recruitment process will be transferred to your personnel file and retained during your employment. The periods for which your data will be held will be provided to you in a new employee privacy statement.

Your rights

As a data subject, you have a number of rights. You can:

- access and obtain a copy of your data on request;
- require the Charity to change incorrect or incomplete data;
- Request human intervention in AI supported decisions;
- Contest an AI assisted decision;
- require the Charity to delete or stop processing your data, for example where the data is no longer necessary for the purposes of processing;
- object to the processing of your data where the Charity is relying on its legitimate interests as the legal ground for processing; and
- ask the Charity to stop processing data for a period if data is inaccurate or there is a dispute about whether or not your interests override the Charity's legitimate grounds for processing data.

If you would like to exercise any of these rights, please contact the Charity's Company Secretary, Joanne Mornin (joanne.mornin@ycr.org.uk)

You can make a subject access request by contacting the Company Secretary.

If you believe that the Charity has not complied with your data protection rights, you can complain to the Information Commissioner.

What if you do not provide personal data?

You are under no statutory or contractual obligation to provide data to the Charity during the recruitment process. However, if you do not provide the information, the Charity may not be able to process your application properly or at all.

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