Position description – CRM Business Analyst

Work level	3
Group/team	Business Solutions
Reporting to	CRM Manager
Direct reports	Nil
Employment type	Fixed term 12 months

Vision, mission and values

Beyond Blue*'s* vision is that all people in Australia achieve their best possible mental health. Our mission is to promote good mental health. We create change to protect everyone's mental health and improve the lives of individuals, families and communities affected by anxiety, depression and suicide.

All employees are expected to act in accordance with Beyond Blue*'s* values, which are **Collaboration, Respect, Enthusiasm, Excellence, Innovation and Integrity.**

Position purpose

Beyond Blue is moving through a phase of significant technological transformation that is targeted toward major business improvement across the organisation. An experienced CRM Business Analyst is required to support several change activities.

Reporting to the CRM Manager, the CRM BA, will support the CRM and Project Manager initially in CRM BAU continuous improvement activities and then onto new design and implementation of new CRM program of works. The CRM BA will be required to work closely with the CRM Team in bridging the gap between business deliverables and technical requirements. This role requires a community centric BA who has an excellent understanding of CX principals and understand the community's needs delivered through community centric requirements that view the community's needs from the outside in.

The CRM BA will also utilise their current BA skillset of data gathering to define processes and convert these into requirements, whilst fostering collaborative relationships with the business and key program stakeholders.

Accountabilities

- Work with the business to gather community centric requirements and guide the Executive Team through the required technological changes to the business.
- Work with the business, CRM and IT team members to implement the CRM solution that is community centric, reliable and resourceful in line with the CRM Strategic objectives
- Apply appropriate techniques with CX principals and tools to model analysis and design outcomes that drive lean and effective business processes as well as delivering the community's needs
- Document as-is (current state) and to-be (future state) business processes.
- Define scope, community and business drivers and needs for CRM BAU enhancements and future community centric CRM works/ initiatives.
- Take a lead role in development of business cases that include cost-benefit analysis, community insights and community benefits and needs.

- Facilitate the fit/gap assessment and assist in identifying CRM system solution gaps, analysing requirements, and determining community benefit impacts.
- Data gathering community centric needs, through interviews, workshop facilitation or document review
- Document integration or data migration requirements when required
- Support the project and IT team in the development and documentation of CRM system configuration requirements.
- Actively participate and coordinate the preparation for and the conduct of community centric requirements elicitation or solution design workshops.
- Manage the traceability of the Requirements and their resolution for their respective functional area throughout the respective project's lifecycle.
- Actively participate and coordinate the preparation of CRM workstreams
- Report weekly status, issues and potential risks to the CRM Manager, Project Manager and Project Team
- Prepare high quality written documents as required – including briefing papers, project management documentation, procurement documents, business cases.
- Build strong working relationships with key business stakeholders and selected solution providers.
- Work with the CRM Manager, PM and business representatives to ensure people impacts are identified and managed.
- Ensure all administrative and reporting responsibilities are provided for including collating reports, preparing briefing notes and reports, facilitating meetings and workshops.
- Ensure that all work is socially inclusive and respectful of diversity.

Selection criteria

Education/qualifications

Essential

- A Bachelor's or Postgraduate degree in Information Technology (IT) / Information Systems (IS) or Business degree

Desirable

- Education or training in the Business Analysis Body of Knowledge (BABOK)
- Training in Lean and / or Six Sigma methodologies
- Agile Certified Scrum Master/Product Owner
- Salesforce Certification

Knowledge/skills/experience

Essential

- Minimum of 4 Years of Business Systems Analyst / IT Business Analyst experience.
- Experience in requirements documentation, analysis and management
- Experience in applying CX principals and community outcomes to at least one organisation wide project
- Experience in system/application enabled business process change.
- Systems analysis and/or business process analysis experience in at least 1 organisational wide business change project.
- Experience in process modelling (BPMN) and data modelling and Use Case development.
- Experience in employing different diagramming techniques such as context diagramming, decomposition diagramming.
- Proven experience in planning, conducting and documenting the outcomes from data gathering employing elicitation techniques including facilitated workshops, meetings, document review, survey/questionnaires.
- Experience in developing and leading test cases based on business process/requirements.

- Experience in Business Case development and the development of the supporting Cost/Benefit models.
- Experience in the development and then practical usage of data, applications and technology layers of Enterprise Architecture.

Skills

- Ability to analyse documents and elicit requirements using a strong eye for detail.
- Strong verbal and written communication skills to ensure clear communications with internal customers for the purposes of requirements elicitation & documentation, solution definition, and issue resolution.
- Strong workshop facilitation and meeting management skills.
- Process and data requirement documentation skills.
- Ability to efficiently complete and present deliverables in Microsoft Visio, Excel, Word and PowerPoint using medium to advanced knowledge in these tools.
- Ability to proactively identify areas for improvement, present alternative solutions to problems and gather the resources required to undertake the resolution of issues.

Team structure and relationships

Team Structure

- The role will report to the CRM Manager.

Internal

- Liaise/work closely with the CRM Administrators, Project Manager as required for assignment of tasks, and reporting progress and issues
- Liaise/work closely with other members of the Digital, Martech and IT teams as required for assigned tasks
- Liaise/partner with internal business representatives, specialist teams to ensure requirements are elicited, understood, documented, met
- Corporate Services Team

External

- Liaise/work closely with Salesforce Development Partner in project delivery

Extent of authority

As per the Delegations of Authority Policy

Health, Safety and Wellbeing

Beyond Blue is committed to ensuring the physical and psychological health and safety of all employees, contractors and other people involved in our business activities. Our people are expected to comply with our Health, Safety and Wellbeing policy.

Prepared by	Felicity McIntosh	**Date**	
Approved by		**Date**	
Employee sign off		**Date**	