

Position Description



Position title	CRM Product Owner
Team/Group	Wellness and Prevention/Community Partnerships
Work level	3
Position reporting to	CRM Program Manager
Employment Type	1.0 FTE 2 year fixed term

Vision, mission and values

Beyond Blue’s vision is that all people in Australia achieve their best possible mental health. Our mission is to work with the community to improve mental health and prevent suicide. We aim to achieve this by:

1. Promoting mental health and wellbeing
2. Being a trusted source of information, advice, and support
3. Working together to prevent suicide

Beyond Blues values are **Collaboration, Respect, Enthusiasm, Excellence, Innovation and Integrity.**

Position purpose

Beyond Blue embarked on a project to deliver a CRM solution in 2017. Since then, a CRM has been delivered for some teams within Beyond Blue. Beyond Blue is now aiming to roll the CRM out to the remainder of the organisation, in its simplest form as a Contact Management System, to allow a shared Beyond Blue view of person and organisation.

Over the next six to twelve months, there are six key business priorities CRM will need to focus on:

- BAU management
- Continual improvement for Be You (Beyond Blue program with specific requirements of CRM including external users)
- Addressing any major issues for existing teams using the CRM (particularly fundraising)
- Cleansing CRM data
- Embedding the marketing automation function
- Undertaking a project to roll CRM out to the remainder of the organisation

The CRM Product Owner is responsible for managing the business’ needs and priorities for the CRM including development, implementation, and optimisation of the CRM.

Role dimensions	Direct Reports	1 – CRM Business Analyst
	Overall team	<i>CRM Team (Interim will be Marketing Technology team)</i>
	Financial Delegation	<i>As per the Delegations of Authorities Policy</i>

**Key
accountabilities****CRM Product Owner**

- Work closely with the CRM Program Manager to provide CRM contextual information to develop the CRM road map to guide enhancement and development activities required to achieve a single view
- Refine and deliver the CRM roadmap and associated business case/s for the Beyond Blue CRM
- Keep the CRM Executive Sponsor informed about activities and of any issues/ risks arising
- Prepare and chair or co-chair key governance meetings as directed by the CRM Program Manager and Executive Sponsor
- Prepare briefings and papers for CRM Exec Sponsor
- Manage the work of the CRM cross-functional team to continually improve and implement the Beyond Blue CRM solution to meets business and community needs.
- Understand, analyse, and prioritise CRM users' needs, pain points and business requirements using interviews, workshops, and consultations
- Actively engage with the CRM cross-functional team to problem solve and assist in the delivery of outcomes
- Oversee organisational change management and system training
- Oversee all CRM data, including managing business rules, data integrity, and reporting.
- Drive initiatives across people, systems, and processes to improve how Beyond Blue integrates and leverages customer data to support our work.
- Create KPIs, analyse data and performance metrics to inform the CRM strategy.
- Assess and monitor risks to all CRM activities monthly and implement new controls to mitigate risks where required.
- Manage the prioritisation and grooming of suggested/ planned CRM works, features and stories of the backlog using such tools as Trello, JIRA and Confluence
- Run and participate in agile team meetings (e.g. sprint planning)
- Develop and monitor accurate project and operational budgets.

Relationship management

- Develop and maintain a thorough understanding of Beyond Blue's strategic objectives, and the role of the CRM in achieving these objectives
- Engagement and collaboration with internal business user stakeholders groups and across multiple experience, product and technology teams
- Proactively manage external stakeholder's such as Salesforce and Beyond Blue's development partner's delivery and expectations relating to the CRM roadmap and development

Teamwork and leadership

- Provide strategic advice to the organisation in relation to CRM, guided by the best available evidence and best practice
 - Work collaboratively to identify opportunities and solutions, challenges and emerging issues facing Beyond Blue and champion and lead agreed responses across the organisation
 - Provide timely, relevant, and adaptable leadership and support to the CRM team members.
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- Proactively collaborate with other teams and units within Beyond Blue to leverage the skills and experience available to successfully execute CRM activities.

Innovation and creativity

- Foster of culture of continuous improvement in the team by utilising data, research insights and feedback to identify opportunities for innovation
- Contribute to the development of a culture of innovation by POC development, testing, learning and optimising activity.

Community focus

- Champion best practice and community-centric approaches to increase engagement and enhance Beyond Blue's brand and user experience.

Key behaviours

- We are community centric and focus on solving problems, listening, and adjusting plans to deliver better outcomes for the community
- We create a sense of fun and light-heartedness, and channel our energy and enthusiasm into meaningful work
- We create clarity and ensure our actions align to our strategy, so we can prioritise our finite resources
- We collaborate to provide solutions and options for feedback
- We actively listen, and communicate openly and transparently
- We build relationships internally and partner with the whole organisation on shared goals, problems, and solutions
- We build relationships externally and partner with key external stakeholders for the benefit of the community
- We adapt, flex and take an agile approach to plans to meet community need

Qualifications and key selection criteria

- Bachelor's degree or higher in Business, Marketing, Information Technology, Product Management or related fields
 - Previous Salesforce Product Owner Experience with a minimum of 3 years
 - Strong people management, team leadership and resource management skills
 - Proven experience working in agile team delivery as a product owner .
 - Agile or Scrum Product Owner certification
 - Experience working in a product owner role
 - Experience in Salesforce CRM platforms and related products
 - Understanding of Human Centred Design
 - Salesforce experience and certification
 - Experience in driving change across people, processes and platforms to deliver solutions.
 - The ability to analyse data to grasp issues, draw conclusions, understand users' needs and make recommendations.
 - Knowledge of strategic problem solving and frameworks, project and change management.
 - Ability to build and maintain strong relationships with internal and external stakeholders
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- Highly effective planning, organisational and personal time management skills.
 - Willingness to commit to and work in line with the Beyond Blue Values
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Additional information

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

Pre-existing injury

The person appointed to this position will be required to disclose any pre-existing injuries or disease that might be affected by employment in this position. This will assist the organisation in providing a safe work environment for staff.

Equal opportunity

Beyond Blue is an equal opportunity employer. All staff have a responsibility to be familiar with and adhere to the organisation's policies and procedures.

Cultural competency

Beyond Blue strives to maintain a culturally competent and inclusive workplace. All staff are expected to undergo regular cultural competence training as part of their professional development plans.

Employment is subject to:

- A current Police Record Check
 - Proof of the right to work in Australia
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