

NCBA Bank PLC

Job Title:	Senior Manager, CRM Systems	Reports to:	Head, IT Enterprise Applications
Department:	Information Technology	Division:	Technology and Operations
Grade:	Band 6	Date:	2024
Job holder:		Supervisor:	
Signature:		Signature:	

Job Purpose Statement
<p>The Senior Manager, CRM Systems role is to plan, organize, and manage staff and overall operations that facilitate the stable operation of the bank's Customer Relationship Management (CRM) systems, Feedback Systems, Policy Hub and other peripheral applications and system integrations. In collaboration with external vendors, system experts and information security experts the Senior Manager, CRM Systems will schedule and direct activities to resolve software and service problems within the CRM and related platforms in a timely and accurate fashion.</p>

Key Accountabilities (Duties and Responsibilities)		
Perspective	% Weighting <i>(to add up to 100%)</i>	Output
Leadership Management	40%	<p>Reviews policies and procedures regularly to ensure compliance with guidelines.</p> <p>Work with Microsoft and CRM Vendor to implement a CRM Management and support framework that is applicable throughout the organization.</p> <p>Evaluation and selection of new technology to support new products and services for CRM components.</p> <p>Create strong relationships at regional/global level within the IT community to ensure maximum leverage of resources / solutions to support local requirements.</p>
Application Development	10%	<p>Support the product ideation process, development lifecycle, and go to market efforts of proposals selected to move forward within the development lifecycle</p> <p>Manage specific application quality assurance and help desk activities including the tracking of bug reports, change requests and ensuring their timely resolution</p>
Incident / Problem Management	20%	<p>Resolve any incidents causing interruption of service in the quickest and most effective way possible according to defined SLA's.</p>

NCBA Group Job Description – Senior Manager, CRM Systems

		Investigate the underlying causes of any real or potential anomalies in CRM system and define possible solutions to anomalies. Put forward requests for changes (RFC) needed to re-establish quality of service. Carry out post-implementation reviews (PIR) to ensure that the changes have brought about the desired results without causing side effects
Change Management	20%	Evaluate and plan for changes to CRM system and ensure established change management procedures and ensuring the quality and continuity of the service at all times
Configuration Management	10%	Controlling all elements of CRM infrastructure configuration with a sufficient level of detail and managing this information using the configuration database (CMDB). Providing accurate information about the CRM configuration to all the various management processes. Periodically monitoring the configuration of the systems in the production environment and comparing it with what is held in the CMDB to correct any discrepancies

Job Dimensions

Reporting Relationships: jobs that report to this position directly and indirectly	
Direct Reports	5
Indirect Reports	Nil

Stakeholder Management: key stakeholders that the position holder will need to liaise/work with to be successful in this role.	
Internal Customer Experience EPM BPM All Business Units	External Digital Business Partners – Safaricom / Stawi System Vendors

Decision Making Authority /Mandates/Constraints: the decisions the position holder is empowered to make <i>(Indicate if it is Operational, Managerial or Strategic). Please also highlight any budgetary control responsibility if applicable for the role.</i>
<ul style="list-style-type: none"> • Role guided by Information Technology Policy, Information Security Policy and Various IT operational Procedures • Task prioritization and resource planning within the projects and tasks for self.

Work cycle and impact: time horizon and nature of impact (Planning) <i>(e.g. Less than 1 week, 2 weeks, 2 weeks – 1 month, 1month – 3 months, 3-6 months, 6-12 months, above 1 year)</i>
1 Months – 3 Months

NCBA Group Job Description – Senior Manager, CRM Systems

Ideal Job Specifications

- Undergraduate degree in Computer Science /Information Technology - Minimum 2nd Upper Class honours.
- Minimum 7 years working experience in a busy IT environment with a hands-on role in implementing and development Workflows & Business Automation Systems e.g. Customer Relationships Management Systems (CMRM), MS SharePoint and MS Power Platform.
- 2-3 years management experience.
- Certified in MS Dynamics 365 Customer Engagement and/or Power Platform.
- Experienced in Microsoft Dynamic CRM, Microsoft SQL Server, and Microsoft SharePoint, Microsoft Power Platform (Power Apps, Power Automate & Power BI) and C#.Net & ASP.net Web development.
- Experience of working in the IT function within a banking environment will be an advantage.
- Experienced with platform architectures (e.g. client-server, n-tier, thin client)
- Proficient with developing, deploying, customizing and integrating Microsoft Dynamics CRM, MS SharePoint and MS Power Platform
- Demonstrated proficiency in understanding and implementing business Process Automation workflows and processes
- Demonstrated proficiency in using the either the CRM SDK or plugin platforms.
- Demonstrated proficiency with Microsoft .NET 3.5+ development using C#
- Experience in developing integration services using API (SOAP & REST) and MS SSIS
- Experience with source control management systems and continuous integration/deployment environments

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Technical Competencies	
	<ul style="list-style-type: none">• Knowledge and effective application of all relevant banking policies, processes, procedures and guidelines to consistently achieve required compliance standards or benchmarks.• In depth knowledge of Dynamics CRM 2015/16/D365, MS Power Platform, MS SharePoint, SQL Server and Network Infrastructure knowledge. Ability to work with users of all levels and technical ability across the application. The ability to diagnose, troubleshoot and resolve user issues.• In depth Knowledge in API development(SOAP & REST)• In depth Knowledge in Workflow and Business Process Automation platforms such as MS SharePoint and Ms Power Platform.• Leadership skills to effectively manage/lead a team and deputize for the team leader. Motivates and empowers others to reach organizational goals.• Hands on experience with Microsoft Platform deployments and requisite system development skills needed to do development on dynamics. Preferable .NET framework.• Technical skills to effectively perform or guide performance of Application architectural design ensuring that all solutions developed and deployed are in line with the Enterprise Architecture standards
Behavioural Competencies	
	<ul style="list-style-type: none">• Interpersonal skills to effectively communicate with and manage customer expectations (internal and external), and other stakeholders who impact performance.• Self-empowerment to enable development of open communication, teamwork and trust that is needed to support true performance and customer-service oriented culture.• Team player and able to work with minimum supervision• Ability to adapt to changes in systems and procedures• Planning and organizing to effectively structure work assignments for timely delivery on system analysis assignments.• Quality Orientation to effectively perform assigned activities/tasks in a manner that consistently achieves high quality standards or benchmarks.