



MS Dynamics CRM Systems Administrator - job description

This job description gives an overview of the kind of work and level of responsibility expected for this role. It's not a complete list of all tasks, and duties may change occasionally. But the overall nature of the job and the level of responsibility will stay the same.

Section 1 - Job details

Job title	MS Dynamics CRM Systems Administrator
Directorate	Corporate Services
Department or team (if applicable)	Technology Team
Reports to	CRM Product Manager
Direct reports	None
Job location	Office-based in London with flexibility to work remotely
Contracted hours are agreed locally with line managers	

Section 2 - Job purpose

The MS Society has made a huge investment in technology to implement a new CRM system to enable us to improve in use of our data and to streamline contact with the MS Community, including Services, Fundraising and directed communications. This is the Organisation's key, central system.

90% of all funding for the charity is processed through the CRM system including Gift Aid, regular giving and special events, Direct Debits. This role is critical and responsible for the end to end processes working and, therefore, the income being processed and collected in a timely fashion.

The role will be part of a CRM team responsible for managing and supporting functionality and data integrity within the CRM system. The role is also responsible for managing key internal and external relationships at all levels.

The role is also responsible for delivering the 1st, 2nd line support of the CRM system as well

Section 3 - Key responsibilities and accountabilities

	One line description of responsibility or accountability
1	Responsible for major data import/export into the system including data validation, deduplication, cleansing and fixing of data throughout the multiple data systems.
2	Responsible for managing 3rd parties to define the standards, format, quality and methods of data import/export.
3	Responsible for the curation and management of import and export routines of key fundraising data using appropriate tools.
4	Responsible for forming and managing the functions work within the Organisation to build key relationships with key data users to ensure data is correctly ingested and that the money follows the data through the system.
5	Creating and managing CRM workflow and system configuration including first line support
6	Maintenance of legacy systems and processes where necessary

Section 4 – Dimension of the role

Resources	Responsible for the proper use and safekeeping of data assets within the CRM system and beyond.
Staff or volunteers	No staff but responsible for fully managing key relationships internally and externally.
Budget	Import into the Section's budgetary planning and management.
Key relationships	DBA, S&BI Team, Individual Giving, Fundraisers, Events Team and any data/system user.
Information security and data governance	Responsibility for undertaking relevant actions and responsibilities according to the role assigned by the MS Society

Section 5 – Key deliverables

	Measures of success
1	Maintenance of clean, relevant and timebound data sets
2	Automated process creation to ensure duplications are managed
3	Accessibility to data at all times
4	Advice to the Organisation on best practice on data collection and management.
5	Management of key stakeholders

Section 6 – Competencies

Competency	Level required (see below)	B	E	A	T
Fosters co-production			X		X
Open to change and innovation		X		X	
Sound decisions			X	X	
Collaborative working					X
Effective communication				X	X
Outcome focussed		X			X
Inclusivity					X
Accountability		X	X	X	X
Tech savvy		X		X	

Level	Description
5	Strategic Has a broad and advanced understanding of the organisation's policies, procedures, and how things work across the MS Society, or has deep expert knowledge in a specific area. Shares expert advice on topics related to MS and represents the MS Society in public or external settings. Clearly explains the organisation's vision and strategy in a way that others can understand and act on. Makes important decisions that have a big impact and ensures the right resources are in place to support them.
4	Expert or recognised authority Shows expert knowledge and strong leadership, influencing others in a positive way. Colleagues regularly perform tasks at a high level, instinctively understanding what needs to be done, how it affects other areas, and how it can be improved for the MS Society's benefit. They have deep expertise and focus on developing their skills. They're the go-to person for advice and are known for their knowledge, using their experience to tackle new challenges. They are responsible for managing significant resources, like people and budgets, related to their work.
3	Complex These roles may or may not involve managing others, but they require using experience or professional knowledge to handle complex information or raw data. The work often involves solving unusual problems by using your own judgment, without needing instructions. You'll also need to work with others to overcome challenges and achieve results across different teams or departments.
2	Enhanced These roles may or may not involve managing people, but they are responsible for handling cases and providing face-to-face services. Or managing internal or external processes and people (including volunteers). People in these roles understand how their team or function works, help build good relationships inside and outside the organisation, and work together to achieve results. They use their knowledge to organise and manage tasks and processes, solve everyday problems, and help improve the way things are done..
1	Foundation People in these roles contribute to the MS Society without any responsibility for managing processes or people. People in these roles understand what's needed for their job and how it fits with other roles and tasks. They know what needs to be done and have the skills and ability to complete those tasks.

Section 7 - Qualifications and training

(List qualifications and training needed for this role)

Qualification or equivalent	
Internal training	
Other professional training or qualifications	Some of the tools used are proprietary and have been built in a certain way. There will need to be training in SQL, SSIS and KingswaySoft.

Section 8 - Person specification (knowledge, experience, skills and attributes needed for the job)

Essential requirements will be tested at application stage (A) and used as shortlisting criteria for deciding who will be invited to interview.

Requirement	Essential	Desirable	Tested*
SQL (SSIS, SSRS) knowledge		x	I
Knowledge of Dynamics CRM 365 and associated technology	x		A I
Working knowledge of KingswaySoft		X	I
Knowledge of deduplication techniques	X		A I
Proven Dynamics 365 experience, including data imports	X		A I

*Tested – A (application), I (interview), T (test or Assessment), P (through performance reviews including probation, 1:1s and PDR)

Section 9 – Other information and requirements

Confidentiality	Make sure sensitive or personal information is kept private and only shared with the right people. All information must be handled according to GDPR and other relevant laws and rules.
Equality, diversity and inclusion	Make sure all your work supports our commitment to equality, diversity, and inclusion. As a charity focused on helping disabled people, we expect everyone to be open-minded and creative in finding and removing any barriers that might affect disabled people, including colleagues, who work with us.
Health and safety	Help create a safe working environment by following all health and safety rules and completing any required training.
Safeguarding	We're committed to safe and responsible recruitment. We aim to protect the wellbeing of children, young people, and vulnerable adults, and we expect all staff and volunteers to support this. Background checks and a Disclosure and Barring Service/AccessNI/PVG scheme check will not be required for this role.
Digital, data and Technology	Use technology confidently to do your job, including internet voice and video calls, Microsoft Office, the MS Society intranet, HR and finance systems, case management software, and other MS Society tools and apps.
Unusual specific physical or mental demands associated with the role	n/a
Travel requirements	Visits to the office for Team meets etc.
Unsocial hours	When necessary but not often. System upgrades etc.

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