Business Intelligence Lead - (Engagement and Income) 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	Business Intelligence Lead (Engagement)
Directorate	Corporate Services
Department or team (if applicable)	Strategy and Business Intelligence
Reports to	Head of Data and Business Intelligence
Direct reports	3
Job location	Office-based in London with flexibility to work remotely
Contracted hours are agreed locally with line managers	

Section 2 - Job purpose

The Business Intelligence Lead role is focused on enhancing the MS Society's engagement and fundraising efforts through strategic data analysis and insights. This cross-organisational position focuses on managing data selections for marketing and communications, analysing customer journeys and engagement, and providing actionable recommendations to optimise engagement and fundraising strategies. By fostering data-driven decision-making and ensuring data integrity, this role will significantly contribute to our ability to effectively connect with and expand our supporter base, ultimately driving greater impact.

Section 3 - Key responsibilities and accountabilities

	One line description of responsibility or accountability
1	Multi-Channel marketing and engagement optimisation - develop and implement data strategies to enhance marketing, engagement, and fundraising efforts across all channels (emails, websites, social media, direct mail, etc.). Oversee analysis and utilisation of advanced data techniques to support optimisation efforts and collaborate with teams to ensure insights are integrated into strategies to refine audience segmentation, maximise engagement, conversion rates, and fundraising results.
2	Data selections and segmentation - manage data selections for engagement, marketing, and communications. Develop and implement segmentation strategies to optimise engagement and supporter experience. Collaborate with teams to understand their data needs and provide relevant audience segments, and ensure data selections are accurate, timely, and compliant with data governance policies.
3	Data analysis and reporting - conduct comprehensive data analysis to evaluate the effectiveness of engagement, marketing, and fundraising initiatives. Develop and maintain dashboards and reports that track KPIs. Use data visualisation tools to present complex data findings in a clear and compelling manner. Ensure the accuracy, relevance, and timeliness of data used.
4	Cross-organisational partnering - work closely with fundraising, marketing, communications, and digital teams to align data strategies with organisational goals. Provide expertise and support in data analytics, ensuring they leverage data effectively to drive engagement and fundraising outcomes.
5	Team management and development - Manage and mentor a high-performance team of analysts, providing guidance on data analysis techniques, tools, and best practices. Foster a collaborative and innovative team environment, encouraging professional development and continuous learning. Manage the team's engagement, marketing and fundraising data, optimisation, and analysis services.
6	Data maturity - support initiatives to improve organisational data maturity and promote a culture of data-driven decision-making. Work closely Data and BI colleagues to ensure cohesive data strategies and frameworks and implementation.
7	Innovation and best practices - Stay abreast of relevant trends and best practices in data analytics for engagement, marketing, and fundraising. Support and advocate adoption of innovative data methodologies and tools to improve engagement and fundraising effectiveness

Section 4 – Dimension of the role

Resources	Responsible for the proper use and safekeeping of the created and used Microsoft toolsets
Staff or volunteers	3 direct reports
Budget	Responsible in direct area of control (licenses etc)
Key relationships	Truly cross organisation, data users, working groups, all end users
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	High performance team
2	On-going insights and recommendations to support optimisation of engagement, marketing, and fundraising.
3	Reports and dashboards for engagement, marketing, and fundraising
4	Continuous improvement and innovations into data and analytics
5	Clear data strategies and frameworks to support optimisation, selections, and reporting efforts

Section 6 – Competencies

Competency	Level required (see below)	B	E	A	T
Fosters co-production	**3**		**X**		**X**
Open to change and innovation	**4**	**X**		**X**	
Sound decisions	**3**		**X**	**X**	
Collaborative working	**3**				**X**
Effective communication	**3**			**X**	**X**
Outcome focussed	**4**	**X**			**X**
Inclusivity	**3**				**X**
Accountability	**3**	**X**	**X**	**X**	**X**
Tech savvy	**5**	**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

Qualification or equivalent	
Internal training	
Other professional training or qualifications	

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. There should be no more than 7 essential shortlisting criteria.

Requirement	Essential	Desirable	Tested*
Proven experience in a data-driven marketing, engagement, or fundraising management role, preferably within the charity or non-profit sector	X		AI
Significant knowledge and experience of advanced data analysis techniques, CRM systems, and marketing automation tools	X		AI
Experience with digital marketing channels, including email marketing, website analytics, and social media engagement	X		AI
Proficiency in data modelling, SQL, and data visualisation tools (e.g., Power BI).	X		AI
Excellent analytical, problem-solving, and project management skills	X		AI
Experience of communicating complex information in an accessible manner to a range of stakeholders	X		AI
Experience of developing and managing a team, which provides advice and data services across an organisation	X		AI
Knowledge of data governance and data quality principles	X		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 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	None
Travel requirements	To and from Office
Unsocial hours	When necessary