

**JOB DESCRIPTION**

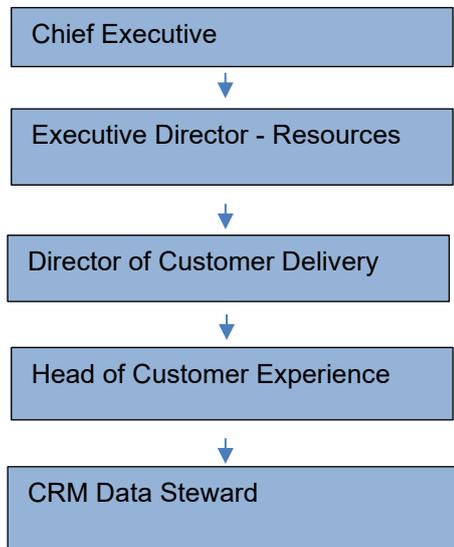
<b>Job Title</b>	CRM Data Steward
<b>Department</b>	Customer Delivery
<b>Section or Service</b>	Customer Experience
<b>Grade</b>	F

**DESIGNATION:**

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<b>Responsible to:</b>	Head of Customer Experience
<b>Employees directly supervised (if applicable):</b>	None

**Family Tree**



## **1. JOB PURPOSE:**

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The CRM Data Steward is the Council's lead on CRM data governance, responsible for setting standards, ensuring data integrity and overseeing audits across all resident and service records.

Owning data quality, compliance and process improvement, the postholder will drive evidence-based decision making, operational efficiency and organisational confidence in Council services.

With strategic oversight of trends, feedback and system enhancements, the postholder will guide teams and influence policy to close service gaps enhance resident experience and uphold transparency, fairness and trust across the Council.

## **2. DESCRIPTION OF DUTIES:**

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This role is responsible for maintaining the accuracy, consistency, timeliness and relevance of data within the CRM system. This involves identifying and correcting errors, removing duplicates, filling in missing information, ensuring compliance with data governance and GDPR regulations, and preparing data for system migrations if necessary.

### **Data Governance & Compliance**

- Lead and oversee assurance checks and compliance audits to confirm CRM data aligns with governance policies, statutory requirements, and organisational standards.
- Ensure and oversee CRM compliance with data protection regulations such as GDPR, leading reviews and updates to governance policies and records.
- Define, own, and enforce CRM data standards, documentation (e.g., business glossary), and processes, ensuring alignment with enterprise-level policies and embedding best practice across the organisation.
- Provide leadership to data owners by setting best practices, resolving cross-cutting issues, and ensuring alignment with technical standards and organisational governance frameworks.

### **Data Quality & Cleansing**

- Lead the design and automation of CRM data quality processes in partnership with DD&T, ensuring sustainable, scalable, and efficient governance practices.
- Govern and manage data preparation for migration and system upgrades, ensuring datasets are accurate, complete, and free of inconsistencies.
- Ensure and oversee seamless integration between CRM 365 and other council systems (e.g., housing, parking) to guarantee consistent, accurate data flow across services.
- Own and oversee the council-wide directory of staff and service contact details, ensuring it remains accurate, trusted, and accessible as the single authoritative source across the organisation.

### **Reporting, Insights & Strategic Decision-Making**

- Direct and deliver detailed analysis of CRM data, producing high-quality reports and insights that inform evidence-based decision-making by the Senior Leadership Team.
- Independently analyse high-volume CRM datasets, identify service gaps, propose

actionable solutions, and advise senior leadership on operational and strategic decisions.

### **System Enhancements & Data Processes**

- Design and implement innovative CRM enhancements, including automated data cleansing workflows using Power Automate and dashboards/visualisations in Power BI, to improve data integrity and support strategic decision-making
- Oversee the organisation and segmentation of CRM data to enable personalised, targeted, and impactful communications with residents.
- Ensure the integrity and functionality of CRM data powering online services and the MyRBKC portal, leading collaboration with digital teams to enhance resident-facing platforms.

### **Training, Culture & Engagement**

- Design, deliver, and coach staff on CRM data standards and best practices, providing ongoing guidance and informal supervision to embed a culture of data quality across services
- Establish and manage mechanisms to gather and analyse resident feedback on online services, translating insights into actionable service improvements and enhanced user experience.
- Own and manage the resident feedback processes within the Listening Tool, ensuring taxonomy and ontology updates maintain accuracy and relevance of data.

### **Key Responsibilities**

As the lead CRM Data Steward, you will have overall accountability for the integrity, quality, and governance of CRM data across the Council. You will oversee high-volume resident and service datasets, ensuring they support efficient operations, evidence-based decision-making, and transparent public service delivery.

You will act as the Council's authority on CRM data standards, processes, and compliance, driving a culture of data quality and directly enhancing community trust.

In this role, you will:

- Ensure accuracy, completeness, and compliance of CRM data through audits, error resolution, duplicate removal, GDPR adherence, and governance standards aligned with enterprise policies.
- Promote adoption of data quality practices by providing training, coaching, and guidance to CRM users, fostering consistent and ethical data management.
- Analyse datasets to identify trends, support decision-making, and enhance service delivery through segmentation strategies, integration with council systems, and actionable insights for leadership.
- Lead CRM enhancements, workflow improvements, portal contributions, and feedback management, while ensuring data integrity for system upgrades and migrations.

**SELECTION CRITERIA/PERSON SPECIFICATION**

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<b>Job Title:</b>	CRM Data Steward
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**Conditions to Note:**

**Candidates:**

When completing your application form, please address your answers directly to each of the selection criteria below. This enables the panel to assess your ability to meet each criterion. It is essential that you give at least one example of your ability to meet each of the four Values and Behaviours: Putting Communities First, Respect, Integrity and Working Together.

**Recruiting Managers:**

The following values and behaviours are essential criteria in each post and must be addressed directly by candidates. The Guidance Notes on values and behaviours for managers give example questions to probe candidates in the interview and application stages of the recruitment process.

**Values & Behaviours**

The Royal Borough of Kensington and Chelsea has identified four key behaviours and values that should be demonstrated by all council employees. Successful candidates will show the ability to meet these behaviours.

<b>A</b>	<p><b>Equal Opportunities</b></p> <p>Demonstrate an understanding of and commitment to Council policies in relation to Equal Opportunity, Customer Care and service delivery, and the ability to implement these policies in the workplace.</p>
<b>B</b>	<p><b>Qualifications</b></p> <p>Whilst no formal qualifications are not strictly necessary, the candidate needs to be able to demonstrate the experience and skills required to perform the role.</p>
<b>C</b>	<p><b>Skills; Experience and Attitude</b></p> <p><b>Essential:</b></p> <p><b>Technical Skills</b></p> <ul style="list-style-type: none"> <li>• Advanced proficiency in Microsoft Dynamics 365, SQL, and Power BI, with demonstrable experience in CRM integration, data governance, and reporting.</li> <li>• Proven ability to work with large, complex datasets, designing automated workflows and data cleansing processes to maintain high-quality, reliable datasets.</li> <li>• Strong understanding of database structures, data models, and system architecture, with the ability to ensure seamless integration between CRM and other council systems (e.g., housing, parking, environmental services).</li> <li>• Experience managing end-to-end data migration processes, including data preparation, validation, and integration.</li> <li>• Knowledge of GDPR, data protection, and council governance frameworks, ensuring compliance across multiple services.</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>CRM Experience</b></li> <li>• Proven experience in CRM administration, particularly Microsoft Dynamics 365, with familiarity in other platforms (e.g., Salesforce, HubSpot).</li> <li>• Experience leading CRM enhancements, including workflow optimisation, system automation, and reporting dashboards to support operational and strategic decision-making.</li> <li>• Understanding of local government operational contexts and the types of resident, service, and organisational data commonly managed in this environment.</li> </ul> <ul style="list-style-type: none"> <li>• <b>Analytical &amp; Problem-Solving Skills</b></li> <li>• Track record of identifying data issues, proposing and implementing solutions, and improving processes to enhance data integrity and usability.</li> <li>• Strong analytical skills to interpret complex datasets, identify trends or service gaps, and provide actionable insights to senior leadership and policy makers.</li> <li>• Exceptional attention to detail and methodical approach to identifying inconsistencies, gaps, or risks in large-scale datasets.</li> </ul> <ul style="list-style-type: none"> <li>• <b>Communication &amp; Leadership</b></li> <li>• Proven ability to lead, coach, and influence cross-functional teams, including DD&amp;T, data owners, and service leads, to embed data quality and governance standards.</li> <li>• Strong written and verbal communication skills to document processes, explain technical issues, deliver training, and support executive decision-making.</li> <li>• Ability to act as a strategic advisor and subject matter expert, translating data insights into actionable recommendations that inform policy, service improvements, and resident engagement.</li> </ul>
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Our Values & Behaviours	
<b>D</b>	<div style="background-color: #00bcd4; color: white; padding: 5px; text-align: center; border-radius: 10px; margin-bottom: 10px;"><b>PUTTING COMMUNITIES FIRST</b></div> <ul style="list-style-type: none"> <li>• We put local people at the heart of decision making in everything we do.</li> <li>• We seek to include and involve: all voices matter.</li> <li>• We provide quality services that are responsive, effective and efficient.</li> </ul> <p>The following examples are indicators of effective behaviour:</p> <ul style="list-style-type: none"> <li>• I actively involve and include the communities that I serve in my work.</li> <li>• I shall reflect the views of the communities in my daily work.</li> <li>• I shall improve the service I provide through seeking feedback from others.</li> </ul> <p>Our residents will feel that:</p> <ul style="list-style-type: none"> <li>• I have been included</li> <li>• I can see how my views have been taken into account</li> <li>• I can see improvements and developments based on my input</li> </ul>
<b>E</b>	<div style="background-color: #4caf50; color: white; padding: 5px; text-align: center; border-radius: 10px; margin-bottom: 10px;"><b>RESPECT</b></div> <ul style="list-style-type: none"> <li>• We listen to everyone and value the personal experiences of people in our communities and of each other.</li> <li>• We adopt a fair, and involving approach regardless of any way in which an individual is different to us.</li> </ul>

	<p>The following examples are indicators of effective behaviour:</p> <ul style="list-style-type: none"> <li>• I adapt my approach to take account of all differences and cultures in the community and with colleagues.</li> <li>• I ensure I am equitable and fair by including those who are quiet or may not be able to represent themselves.</li> <li>• I communicate in a way that is respectful, encourages involvement and meets people's needs.</li> </ul> <p>Our residents will feel that:</p> <ul style="list-style-type: none"> <li>• I feel my culture and background are respected.</li> <li>• I have confidence that action is being taken.</li> <li>• I feel I am being treated fairly.</li> </ul>
<p><b>F</b></p>	<div style="text-align: center; border: 2px solid blue; border-radius: 15px; background-color: #00aaff; color: white; padding: 5px; margin-bottom: 10px;"> <p><b>INTEGRITY</b></p> </div> <ul style="list-style-type: none"> <li>• We act with openness, honesty, compassion, responsibility and humility.</li> <li>• We let people know what we are doing and communicate why and how decisions have been made.</li> </ul> <p>The following examples are indicators of effective behaviour:</p> <ul style="list-style-type: none"> <li>• I demonstrate empathy in my interactions with others.</li> <li>• I am honest and transparent about the decisions I take.</li> <li>• I follow through on the actions I say I will take and take ownership for communicating the outcome.</li> </ul> <p>Our residents will feel that:</p> <ul style="list-style-type: none"> <li>• I am told when something is not possible and the reasons why are explained to me.</li> <li>• I feel my perspective is listened to and understood.</li> <li>• I feel my views are valued</li> </ul>
<p><b>G</b></p>	<div style="text-align: center; border: 2px solid green; border-radius: 15px; background-color: #00b050; color: white; padding: 5px; margin-bottom: 10px;"> <p><b>WORKING TOGETHER</b></p> </div> <ul style="list-style-type: none"> <li>• We work together and in partnership with everyone that has an impact on the lives of our residents.</li> <li>• We want to understand, learn from each other and continually adapt.</li> </ul> <p>The following examples are indicators of effective behaviour:</p> <ul style="list-style-type: none"> <li>• I work with others to provide an effective service for residents, local communities and other departments within the Council.</li> <li>• I seek ways to work with other departments to deliver a seamless service and find opportunities to improve.</li> <li>• I seek out opportunities to learn from my colleagues and build on good practice.</li> </ul> <p>Our residents will feel that:</p> <ul style="list-style-type: none"> <li>• I can get my issue resolved without being passed around departments.</li> <li>• I find it easy to access the services that I need.</li> <li>• I feel the Council is open to new ideas.</li> </ul>