Te Kura Matatini ki Otago / Otago Polytechnic, a business division of
Te Pūkenga, New Zealand Institute of Skills and Technology

TE WHAKAATURAKA MAHI / JOB DESCRIPTION

Position Title *Te tūraka mahi* **:** CRM Developer	**Area** *Te Tari*: Digital
Reports to (title) *Ka whakaratatia e*: Director: Digital	**SP10 placement:** E Band

Primary purpose *Te take matua*

To work in partnership with the organisation using a proactive approach, supporting and coaching in line with Otago Polytechnic and Te Pūkenga`s strategic goals and objectives.

The CRM Developer role is a specialist role that will serve as the developer and technical advisor for our Microsoft Dynamics 365 CRM ecosystem, ensuring the platform effectively supports and enhances our sales, marketing, and customer service operations.

The role includes designing, developing and implementing custom solutions within the Microsoft Dynamics 365 CRM Platform ensuring information is collected, stored and presented in line with user requirements, best practice guidelines and relevant legislation in respect to Public Record Act compliance.

The role includes maintaining and enhancing the CRM platform, and ensuring staff are trained and well supported in adhering to information standards. This will ensure best practice information systems and processes are adopted across the organisation and contribute to -

- •   Protect the value and integrity of our organisation's information
- •   Development of an organisation wide business engagement system
- •   Aiding effective decision making and reporting.

The Customer Relationship Management system is a key line of business system that is relied upon daily for the efficient and effective operation of Otago Polytechnic and forms a significant part of the learner journey. The CRM Developer ensures this is achieved as detailed in the Information Systems and Support annual service performance plan.

Key responsibilities/accountabilities *Ko ngā takohaka matua / ko kā kaweka matua*

In order of importance, state the major responsibilities / accountabilities of the position and what is achieved

Key responsibilities / accountabilities *Ko ngā takohaka matua / ko kā kaweka matua*	Outcome *Kā hua*
CRM Advisory	- Develop CRM information management standards and guidelines, based on business goals - Develop, implement and maintain best practices for the storage and retrieval of CRM information - Work with organisational leadership to drive CRM system wide development to actively solve business issues and improve engagement.
CRM Operations	Design and develop custom solutions within Microsoft Dynamics 365 CRM platform.

	• Lead the configuration and implementation of Dynamics 365 CRM, including custom workflows, Power Automate, Power Apps, and integrations. • Troubleshoot and resolve technical issues and user-reported problems • Configure security roles, business units, and user access permissions • Perform system administration tasks including environment management • Monitor system performance and implement optimisation strategies • Maintain system documentation and technical specifications • Ensure the CRM system is supported by effective and efficient processes and strategies and the system is being utilised to its full potential • Ensure personal knowledge is kept up to date with processes relevant to the CRM required by internal stakeholders, policies and OP business requirements and communicate these where appropriate and apply relevant changes to the CRM where required • Assist in the scoping, planning, design, development, of new enhancements to the CRM for the purpose of enhancing business processes, operations, and information process flow • Prioritise, schedule, document and coordinate instances where new functionality, enhancements and defect resolution are required • Post knowledge bases, documentation, current logged CRM issues, and frequently asked questions resources on Polytechnic intranet to assist in problem resolution • New technologies are researched and presented to ensure appropriate stakeholders are informed of tools, trends and opportunities for enhancement • Ensure security of the system is protected at all times and access is secure and the relevant protections/permissions are in place • Identifies problems or issues and independently works to resolve or manages the escalation of these to third parties with authority. • Advise the Director Digital of budget implications for the ongoing management or expansion of CRM costs • Liaising with 3rd Party Support Vendor (Fusion 5) and prioritisation of support tickets • Mentor the CRM Information management analyst in the CRM system and facilitate their professional development in the system. •
CRM Project Work	• Perform a key role on any Information management project, providing leadership to decision making and design. • Liaise with business units to assess their CRM information management requirements and the implementation opportunities for these within the CRM environment. • Undertake detailed analysis of the CRM information management requirements across all systems, platforms and applications • Analyse business objectives and user needs • Collaborate with content and design teams to develop hierarchy and organisation for system design. • Build Information Systems that are informed by stakeholder needs, validated by user feedback, and integrate into a long-term vision.
Observe principles and practices of Equal Employment Opportunity and Diversity	• Fair treatment in the workplace is delivered and observed

Fulfill Safety and Wellbeing responsibilities, accountabilities and authorities as outlined in Otago Polytechnic Safety and Wellbeing Policies	• Achievement of a healthy and safe work and learning environment • New and existing hazards will be pro-actively identified and managed • Incidents, accidents and occupational illnesses immediately reported • Safe work methods will be adhered to including the use of Personal Protective Equipment
Fulfil our individual and collective responsibilities, accountabilities and expectations as outlined in The Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021	• Uphold the responsibilities outlined in The Education (Pastoral Care of Tertiary and International Learners) Code of Practice, contributing to a safe, supportive environment that prioritises ākonga wellbeing and success. Participate in required training to confidently apply the Code within your role. • Integrate Te Tiriti o Waitangi principles and actively support equitable outcomes to create and support opportunities for ākonga voices to be heard, enabling responsive actions that meet ākonga needs and foster their achievement. • Awareness to attain OP as an inclusive environment for all cultures and languages.
Fulfill Information Management responsibilities, accountabilities and authorities as outlined in Otago Polytechnic Information Management Policy	• Create, maintain and store full and accurate records of activities, transactions, and decisions carried out in the course of daily business. • Records are to be disposed of only when legally authorised to do so, as per Disposal Authorities: DA424 and GDA 6 and 7 • Otago Polytechnic records are not to be created or maintained in any personal or private cloud storage services (e.g. DropBox)
Demonstrate organisation's values on a daily basis	• Alignment to organisation behaviours is adhered to ensuring consistency in approach and delivery of outcomes • Our values are consistently demonstrated.

Inherent Requirements:

Inherent requirements refer to your ability to:
- Perform the essential duties and functional requirements of the job
- Meet the productivity and quality requirements of the position
- Work effectively in the team or other type of work organisation concerned; and
- Do the job without undue risk to your own or others health, safety and welfare at work.

Key working relationships *Kā honoka mahi matua*

Key working relationships *Kā honoka mahi matua*	Nature and purpose of contact *Te āhua me te take o te honoka*
Director: Digital	Formal Leader. Provide strategic and operation advice (both ways). Provide assistance and seek instruction on a wide range of matters.
Digital Team	Collegial support and advice, work distribution, peer discussions in a self-managing team environment. Work in partnership with others. Collaboration of processes
All kaimahi	Provide strategic and operational advice (both ways). Provide assistance and instruction on a wide range of matters including system planning
External partners, including but not limited to industry, community and mana whenua	Work in partnership to understand needs and how we can meet these.
External stakeholders	Seek feedback and provide information – both ways.

Decision making authority *Kā rakatirataka whakatauka*	
Decisions expected *Kā whakatauka tūmanako*	**Recommendations expected** *Kā taunaki tūmanako*
Prioritisation of work load and portfolio to bring about maximum organization benefit	Priorities determined
Approvals in accordance with the Delegations of Authority; sign off letter of appointment and variations as required.	Decisions and Expenses approved in line with budget and delegation in a timely and accurate manner. These are as per Otago Polytechnic policies as amended from time to time

Position dimensions   *Kā āhuataka tūraka*

List the relevant financial and staffing dimensions for which this position is accountable.

- **Sales/revenue:** Nil
- **Number of employees reporting directly:** Nil
- **Budget:** Nil

Selection Criteria – Knowledge & Skills   *Whakariteka Kōwhiritaka - kā mātauraka me kā pūkeka*

Essential:
- Deep understanding of Dynamics 365 architecture and customisation capabilities
- Power Platform Expert: Comfortable working across Power Apps and Power Automate to deliver scalable, user-friendly solutions.
- Strong functional knowledge of modules such as:
  Sales Hub (Leads, Opportunities, Pipeline Management)
  Customer Service (Cases, SLAs, Knowledge Base)
  Marketing (Campaigns, Customer Journeys)
- A sound knowledge and understanding of computer technology applications for information management.
- Clear and effective written and oral communication skills
- A high level of professional and ethical conduct
- Understanding of business and customer service principles
- Excellent written, oral, and interpersonal communication skills with the ability to communicate effectively and professionally.
- Ability to present ideas in business-friendly and user-friendly language.

Desirable:
- Experience in managing information within a public sector organisation in New Zealand.
- Ability to build relationships and gain staff commitment.
- Experience leading and working as part of a project team.

Selection Criteria – Education and Experience   *Whakariteka Kōwhiritaka - kā kuraka me kā wheako*

Essential:
- Bachelors degree in related field or equivalent experience
- Minimum 3 years experience in the Microsoft Dynamics CRM platform
- Minimum 3 years experience in developing and reading business processes.
- Previous experience in administering and managing sizeable Information system.
- Experience in planning and reporting

Desirable:
- Experience in the New Zealand Tertiary Education Sector at Academic and Service delivery levels.

Personal Attributes   *Kā Āhuatanga Whaiaro*

- Be an effective Te Tiriti o Waitangi partner by supporting the values and tikaka of mana whenua throughout your mahi
- Facilitative and collaborative leadership style
- High level of professional and ethical conduct
- Effective time management skills
- Initiative, enthusiasm and a positive attitude
- Proven ability to work under pressure.
- Flexible, responsive and customer orientated manner

This position description outlines the key accountabilities/ responsibilities and the selection criteria against which you will be assessed as suitable for the position. As such there will be specific job requirements that we refer to as Inherent Requirements.