



Chartered
Institute of
Taxation.

Dynamics CRM Developer

Role Information Pack
October 2021

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Welcome

Thank you for showing interest in the Dynamics CRM Developer role. As an educational charity and the leading professional body in the UK for advisers dealing with all aspects of taxation, if successful, you will be joining a dedicated team of staff and volunteers who ensure that we continue to meet our primary purpose of promoting education in taxation. Our key aim is to achieve a more efficient and less complex tax system for all, and you will see from our annual reports that we do this through a wide range of activities.

Like many other organisations, the past 18 months has seen an acceleration in our services being offered through more digital and flexible means. We have adapted and performed well and are keen to harness opportunities to continue to grow the CIOT, ATT, and CTA brands in the UK and through our global partnerships. This role will be working with an established and committed team to deliver against our three strategic aims of Education, Standards and Voice and we will talk more about some of those through the selection process. We'd also like you to bring your ideas and experience to the role to help us innovate and meet the needs of all our customers and stakeholders.

We hope you will consider applying for this role and become part of our friendly and committed team.

Jane Ashton

Helen Whiteman

ATT CEO

CIOT CEO



About the ATT and CIOT

The Association of Taxation Technicians (ATT) and Chartered Institute of Taxation (CIOT) are both leading educational charities and professional bodies. We are committed to ensuring that our members, students, volunteers, and staff feel welcomed, valued, and supported.

In October 2020, with the ATT, the CIOT established a Joint Equality, Diversity, and Inclusion (EDI) Committee (which replaced the CIOT's EDI Working Group). The committee assists us in ensuring we have clear EDI values that can be demonstrated through our behaviours, actions, and operations. The committee meets quarterly and reports progress to both governing Councils.

We employ around 85 staff who usually work from our modern, accessible offices at Monck Street, Westminster but we are currently working remotely with activities and services continuing online. In addition, we have c. 730 volunteers. We are fully committed to equality, diversity, and inclusion and we want this to be reflected in the diversity of the people who work for and volunteer with us and we welcome applications from people from all backgrounds and identities. We think that boards and committees whose members have different backgrounds and experience are more likely to provide challenge, encourage debate and to make better decisions. With your help, we want the ATT and CIOT to accelerate our progress towards becoming more accessible, inclusive, diverse, and equitable organisations.



Role description

We are looking for a skilled Dynamics 365 CRM Developer, who will collaborate with teammates to identify, define, design, and implement the appropriate solutions and processes for the entire organization. As a CRM champion they will train people to ensure the CRM is understood by new and existing users; and helps the system to grow and evolve. Assesses various options for optimising and customising the system to help the system grow and evolve. Attends regular meetings with support staff and various team members to review upcoming issues, items, and training.

Job impact (desired impact of this role)

- Gather, identify, and analyse CRM software requirements and ensure that they are met.
- Assist in creation of long-term strategic goals for high data quality and appropriate data use.
- Monitor data quality, data migrations, and data integration.
- Evaluate and configure CRM system and provide detailed end user documentation.
- Provide technical support to end users, diagnosing and resolving problems.

Key accountabilities

1. Responsible for meeting the Institute and Association's short and long-term CRM needs.
2. Research, propose and promote ways of moving the CRM forward and guideline future proofing.
3. Contribute to the selection, development, and implementation of products and processes related to the CRM in-line with the overall IT Strategy, in conjunction with the IT team.
4. Works with the entire organisation as a champion; trains people to ensure the CRM is understood by new and existing users; and helps the system to grow and evolve.
5. Attends regular meetings with other IT suppliers and various team members to review upcoming issues, items, and training.
6. Identifying and correcting errors made by CRM users, communicating these errors in a friendly helpful manner
7. Reporting improper system usage to the IT Systems Manager
8. Providing central point of contact for all CRM change requests & system alterations
9. Creating or updating training manuals, policies, and procedures
10. Providing help-desk support for all CRM users
11. Building customs reports and dashboards specific to job functions
12. Maintaining control of access rights, security settings and user privileges, manage and maintain user permissions, security roles and security teams
13. Preventing unauthorized access to sections by using security roles
14. Provisioning all new users, providing system training and customisation
15. Importing and exporting of data as required
16. Working with the IT Team to manage project implementation and back-end integration



Skills needed to fulfil the role

- Minimum of three to five years' experience in Microsoft Dynamics CRM administration and architecture
- Broad understanding of Dynamics 365 – out-of-the-box functionality and limits
- Hands-on experience in designing, configuring, or administering MS Dynamics CRM required
- Experience within a consultancy role, with experience of full lifecycle experience on CRM based programmes and knowledge of the supporting business processes
- ClickDimensions
- Scribe
- MS Nav/MS Business Central
- Competent in all other MS 365 Office Packages
- Excellent business analysis and problem-solving skills
- Supplier management skills
- Ability to plan, gain support and implement IT projects
- Ability to work with people of varying technical skills

Extra duties in the role

- Strong interpersonal skills and ability to be able to work comfortably with both technical and non-technical stakeholders
- Ability to respond in a flexible and adaptive manner to support business requirements, when ad-hoc requests are made

Salary & Benefits package

Salary

The salary for this role is £40,000 to £42,000 per annum dependent on experience.

Pension

You will be automatically enrolled into the Aviva Group Pension Plan (9% employer and 3% employee contribution) upon joining.

Insurance

- Income protection cover which provides up to 75% of salary if you are absent due to ill health for more than 13 weeks.
- 24-hour group personal accident scheme providing a sum equal to three times current salary in the event of your permanent disability/loss of a limb/ death.
- Non-contributory life assurance cover of 4 times your salary.

Holiday entitlement

The organisation offers a generous holiday entitlement Offering staff holiday entitlement from 22 – 27 days depending on length of service. Staff also get a discretionary extra day holiday during Christmas.

Optional Benefits

Bupa (private medical insurance)

You can join our company paid private medical insurance scheme which pays for the cost of private medical treatment for acute conditions.

Health shield Essentials (including Employee Assistance Programme)

You can join our health & benefit programme. We pay the cost for the basic level (including any dependent children). The benefits include the refund of a range of medical costs (dental, optical, physiotherapy etc) and an employee helpline covering medical and legal issues and counselling.

Interest Free Loans

After 6 months service you may apply for an interest free loan to help with the purchase of a season ticket or a bicycle.

Child Care Vouchers

Our salary sacrifice childcare voucher scheme is currently run by Kiddi vouchers.

Continuous Professional Development

The Chartered Institute of Taxation requires all professional employees to maintain their CPD activities and offers an exciting range of learning opportunities through its branch and conference programmes.



Guidance notes for applicants

Thank you for considering working with us. These notes are designed to help you through our application process. However, if you have any questions regarding the process that are not covered here, please do not hesitate to contact Caroline Wright (cwright@ciot.org.uk) for advice.

You can apply by submitting a cover letter and up to date CV via email to Caroline Wright cwright@ciot.org.uk. Your cover letter should make it clear how your skills and experience match those described in the advert and job description.

If you wish to find out more about the role before applying, you may do so by contacting the individual identified in the advert. This will not prejudice your application in anyway.

If you do not hear from us within 2 weeks of applying this means that you have not been shortlisted on this occasion. Failure to be shortlisted for one role does not bar you from applying for others when they are advertised. This post will be resourced through a two-stage interview process.

If you are invited to interview you must confirm your attendance by the deadline stated in the invitation email.

If you do not do so we will assume you are no longer interested. If there is to be a presentation or test you will be informed of this in advance.

If you have a disability and require special arrangements to be made, please notify us as soon as you are shortlisted so we can try to accommodate your needs.

You will be told during the interview when you may expect to hear the outcome.

Although we appreciate the time and effort that goes into applying for a post with us, we do not give individual feedback on applications or interview performance.

Successful candidates will be required to provide their original qualifications, proof of the right to work in the UK and the details of two referees before they commence employment.

We look forward to receiving your application.

