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| **Title: Digital & Marketing Automation Manager** | **Band: 3**  |
| **Department: Customer First** **Location: Birmingham** | **Last updated: June 2021** |

**1. Purpose of the role:**

Responsible for creating and developing new targeted campaigns and integrated journeys, with the primary focus on generating opportunities/leads for Unity Trust Bank. Supporting the rest of the marketing team with campaigns and journeys for generated content, commercial propositions and other types of marketing activity.

* Marketing Automation Expert: using CRM insight to recommend and build automated customer engagement programmes, based on customer segmentation, behaviour and current product holding cross-sell programs focused on delivering sales, awareness and engagement.
* Management and monitoring of multiple lead nurture programs/scoring & customer segmentation, conducting regular reviews, and analysis to help ensure leads are progressed through the sales funnel.
* Identify, develop and execute (where possible) automated customer journeys, measuring drop off points, and proposing new initiatives to ensure effective engagement of customers and prospects alike
* Responsible for developing campaign rules and logic, model requirements and data feeds – all into the Salesforce Marketing Cloud platform, working to data protection and GDPR principles.
* Ensure all Salesforce Marketing Cloud change processes are completed correctly and tested with strict QA/UAT processes.
* Routinely audit the salesforce database to ensure data is high quality, and to ensure we remain compliant
* Proactively recommend changes to Sales Force to capitalise on salesforce capabilities and to deliver successful campaign execution, ensuring collaboration with key stakeholders.
* Own lead generation targets.
* Use Pay Per Click budget to support lead generation activity, and explore other digital campaign opportunities.
* Own optimisation of the Unity Trust Bank website; ensuring optimal customer journey and customer experience.
* Business owner of Unity Trust Bank cookie policy; implementing the policy and maintaining/ assessing consent rules.
* Lead marketing permissions activity, deliver change where needed to remain compliant as well as building Unity’s opportunity to communicate to more businesses.
* Supporting the Head of Proposition and Brand with the development of all other ad hoc campaigns activity to support business plans (product, brand, regulatory), ensuring cross-business engagement and senior stakeholder buy-in.
* Liaise with relevant Unity Connect members to ensure high quality customer experience and campaign execution. Present campaign activity to Unity Connect team before launch, propose and deliver outbound campaigns.
* Manage and own the results campaign dashboard within Salesforce including web, email, leads generated and conversion into sales

**Key Performance Indicators:**

* Marketing - Lead generation for new business (targets/KPIs)
* Marketing - Lead generation for cross-sell (targets/KPIs)
* Customer First lead on any Martech projects

**Key Competencies:**

* Expert Knowledge of working with a CRM system and sales processes (preferably salesforce/ Marketing Cloud/ Journey Builder (or equivalent) across all aspects of automating campaigns, data flows and processes
* Technically proficient with various email, CRM (Salesforce) and automation platforms: Eloqua (Oracle), IBM Silverpop/Watson (Acoustic), Pardot, Marketo or other similar enterprise platforms.
* Significant experience of leading Martech projects, with a high level of technical experience, conduit between IT team/ salesforce.
* Ability to manage a highly complex and technically diverse range of requirements such as analysis, campaigns and operational sales, and delivering solutions technically

**3. Organisational fit** (structure chart attached separately if necessary)

Role reports to Head of Proposition and Brand

**4. Parameters of the role**

Marketing Automation/ CRM/ Salesforce Lead.

**5. Risks and controls**

* Ensures that treating customers fairly is at the heart of everything we do, both personally and as an organisation. This is achieved by consistently operating to the highest ethical standards aligned to the founding principles of the Bank, as well as understanding that the Bank will at all times seek to protect its reputation.
* Continually reassess the operational risks associated with the role and inherent in the business, taking account of changing economic or market conditions, legal and regulatory requirements, operating procedures and practices, people reorganisation and the impact of new technology. This is achieved by ensuring that all actions take account of the likelihood of operational risk occurring and by addressing any areas of concern with line management and/or the appropriate department.
* Adheres to, and is able to demonstrate adherence to, internal controls. This is achieved by adherence to all relevant procedures, keeping appropriate records and by the timely implementation of internal or external audit points and any issues raised by the external regulators.
* In conjunction with Risk and Compliance function, adhere to the Bank’s Policies and Procedures by containing Compliance risk (this embraces all relevant financial services laws, rules and codes with which the business has to comply). This is achieved by adhering to all relevant processes/procedures and by liaising with the Risk and Compliance function about risk events at the earliest opportunity. Also, when applicable, by ensuring that adequate resources are in place and training is provided, fostering a Compliance culture and optimising relations with the Regulators

**Role subject to regulatory approval** – no

**Other requirements specific to the role –** egFlexibility re working hours/willingness to travel

* You will be from either an in-house or agency background with experience of working with corporate, financial or professional service organisations, the successful candidate will have experience of building effective automated CRM programmes using Salesforce which engage customers and employees.
* Experience of working with and influencing senior executives/leadership.
* Ability to work alone as well as in a team in a demanding environment.

**PERSON SPECIFICATION**

(E = essential D= desirable)

**Professional qualifications**

Marketing Qualification (E)

Business related degree (D)

**Knowledge requirements (and how this is typically gained)**

* Have previously worked in either a marketing journey design or campaign management role
* Can demonstrate where a data led approach has influenced business decision making
* Data skills/experience with a strong commercial focus
* Passionate about marketing
* Detailed understanding of Marketing Automation/ CRM marketing and direct marketing techniques
* Detailed understanding of Martech (marketing technologies)
* Organised and methodical approach to work

**Skill levels required (see Skills Framework)**

**LEVEL**

|  |  |
| --- | --- |
| **LEADERSHIP** | **3** |
| > |  |
| **CUSTOMER SERVICE & SALES** | 3 |
| >  |  |
| **SYSTEMS/IT SKILLS** | **3** |
| > |  |
| **PROCESSING SKILLS** | **3** |
| > |  |

**Skills Framework**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|   | (High)  4 | 3 | 2 | 1 (Low) |
| **Leadership** | Head of function: Communicates to inspire & motivate, builds teams, represents the Bank’s views & interests externally | Manages people: Communicates to manage performance, regularly presents, sets standards and priorities | Team leader/coach:Communicates to guide and develop colleagues on the job  | Individual contributor:Team member, effective communication skills, demonstrates initiative. |
| **Customer Service & Sales** | Sales management: Role model for highest levels of customer serviceManages sales activity towards targets | External customer salesUnderstands how to achieve sales targets via needs based selling skills | External customer serviceAble to meet external customer requests providing a service level which delights  | Meets requirements of internal customers, understands department’s SLA’s and impact of these on others  |
| **Systems/IT skills** | Requires highly technical systems skills to develop systems architecture. | Requires advanced knowledge of specialist systems, adapts these to meet the needs of the business | Requires advanced Microsoft Office skills, produces complex reports from specialist system | Requires standard Microsoft Office skills or basic level of specialist system (data input/look ups) |
| **Processing skills** | Complex analysis of data & report production with recommendations & business acumen. Sets policies, produces reports for external use | Advanced administrative skills requiring analysis, research, investigation, report writing, some decision making required | Skilled administration required– free format letter writing, minute taking, some analysis & judgement required | Basic verbal and numerical reasoning to administer standard letters/forms accurately, prioritises work to meets deadlines & service level agreements |