**POSITION DESCRIPTION**

**Senior Functional Analyst**

# **ABOUT UNITING**

**Our purpose:** To inspire people, enliven communities and confront injustice.

**Our values:** As an organisation we are imaginative, respectful, compassionate and bold.

At Uniting, we believe in taking real steps to make the world a better place. We work to inspire people, enliven communities and confront injustice.

Our services are in the areas of aged care, disability, child and family, community services, and chaplaincy and we get involved in social justice and advocacy issues that impact the people we serve. As an organisation we celebrate diversity and welcome all people regardless of lifestyle choices, ethnicity, faith, sexual orientation or gender identity.

Uniting is one of the largest not-for-profit community service providers in NSW and the ACT, with a rich history of providing services to the community for more than 100 years. We have more than 550 services, as far north as Tweed Heads, as far west as Broken Hill, and as far south as the ACT.

Our focus is always on the people we serve, no matter where they are at in their life. Our range of supports and services are designed in partnership with clients and around their needs.

# **ABOUT THE ROLE**

This is a role within the CRM program and is responsible for working with stakeholders to identify current business process models, integration points and areas of improvement for customer experience and marketing initiatives with the goal of achieving an integrated approach to the customer.

The primary purpose of the role is to design, implement and support the deployment of Microsoft Dynamics 365.

You will seek opportunities to leverage Microsoft Dynamics 365 and related systems to meet evolving business needs and will assist internal stakeholders to appreciate how Microsoft CRM Dynamics could be best utilised to advance Uniting business operations.

This analyst must have the ability to break-down complex requirements and identify solutions to meet strategic as well as operational needs aligned to Microsoft Dynamics 365.

This coupled with the capacity to simplify processes and negotiate stakeholder acceptance will be a key driver in this MS Dynamics 365 for Operations implementation success.

# ROLE OBJECTIVES

You’ll play a valuable role as a member of the CRM project:

* Contributing to a stronger and more unified Uniting
* Working towards the defined priorities and outcomes for the IT team, stakeholders and your specific areas of accountability
* Working with your colleagues to understand and apply the translation of Uniting and Business Stream strategies through your regional and/or local plans, thereby ensuring a consistency in service delivery, practice and maximising performance
* Actively participating in communication in order to understand and contribute to a One Uniting way of operating
* Working productively and collaboratively as a positive role model both within your team and with others across Uniting

**As a Senior Functional Analyst your role will:**

* Contribute towards the efficiency and effectiveness of the Customer Strategy
* Utilise your MS Dynamics CRM functional skills in all stages of the project from Design, Build & Deployment
* Create dashboards and reports for business users
* Assist in the scope, design & build of integrating customers records into CRM
* Consult with internal customers through workshops and presentations
* Apply your analytical skills in capturing, documenting and interpreting business requirements
* Participate in the selection process for new solutions, including the definition of selection criteria
* Produce high quality requirements, functional & design documentation
* Assist in developing “to be” business process maps and identify areas for improvement and optimisation
* Work closely with business analyst, developers, testers & business stakeholders
* Development of business scenarios and test scripts for system integration and user acceptance testing
* Support project team with all testing activities and issues resolution
* Contribute towards the creation of training material
* Support training of business end users where required
* Support our customers through post go live issue resolution
* Provide training and knowledge transfer to other team members and customers with a strong focus on support knowledge transfer
* Develop standard processes to support the evaluation of candidate projects to ensure that these support the organisation’s strategy
* Collect and interpret data relating to the current operating environment relevant to the Customer Strategy
* Contribute to change management and communication activities
* Contribute to post implementation reviews in order to validate internalisation of solution to achieve realisation of benefits (undertake root cause analysis)

# **ABOUT YOU IN THE ROLE**

**Your classification:** Non EA

**Your directorate:**  People and Systems

**You’ll report to: CRM** Programme Manger

**Your key relationships:**

CRM Dynamics Solution Architect

will form key relationships with people in the following roles:

Internal:

* Sponsors and stakeholders, Business Project Managers, Enterprise and Domain Architecture staff, IT Senior Leadership team peers, and Manager Internal Audit and Risk.
* Program Manager, Project Manager

External

* Implementation Service Partners

# **YOUR RESPONSIBILITIES**

**Financial Management:**

* Ensure that all activities and operations within the scope of responsibility are performed in accordance with the allocated budget and policy guidelines

**Operational Processes**

* After consultation, you’ll be willing to undertake additional duties, transfer to another equivalent position or assume higher duties when required
* Contribute to the implementation of Uniting policies, processes, systems and platforms (including technology) so as to ensure efficiency of the wider organisation
* Maintain awareness of and fulfill responsibilities, authorities and accountabilities as defined by Uniting’s health, safety and wellbeing management system and in adherence to the attached WHS responsibilities by role
* Participate and comply with all quality management systems and processes

**Client Management:**

* Ensure that engagement with external parties enhances Uniting’s reputation and growth
* Maintain a high standard of conduct and work performance to promote our reputation with key internal and external stakeholders

**People Management:**

* Act as a constructive member of the CRM Program
* Contribute to a culture of openness, feedback and productivity
* Actively engage and participate in the performance management framework and review processes across Uniting
* Engage in professional development and set and fulfill development goals for yourself
* Contribute to the creation of a cohesive and productive team
* Build and maintain effective team relationships – within own team and across business streams / functions
* Positively model the Code of Conduct and Ethical Behaviour for Uniting
* Represent the Uniting culture and values internally and externally, communicating and acting in ways that are consistent with values of Bold, Respectful, Imaginative and Compassionate
* Model the values and an understanding of Uniting, respecting and valuing the inherent dignity and uniqueness of each person, celebrating diversity, prioritising collaboration, passionately pursuing social justice and inclusion
* Take care for the safety of yourself and others at all times and undertake work in a safe manner in accordance with policies, procedures and instructions (written or verbal) and in adherence to the attached WHS responsibilities by role

# KEY PERFORMANCE INDICATORS

**Financial management:**

* Performance is monitored on an ongoing basis and financial targets achieved as established by the annual budget process

**Operational processes:**

* All stakeholders in your area of responsibility are constantly communicated with and remain informed and involved in appropriate aspects of the project.
* Demonstration of functional leadership
* Ownership is demonstrated in creation of business requirements and business process maps
* Support is provided to the project team with test script creation, testing, issue resolution, training and all cutover preparation activities
* Contribution is provided to impact analysis of the project which supports project change and communications planning and change readiness across the organisation, functions and individuals
* Support is provided to projects to define and document business or technical processes

**Client management:**

* Client feedback shows sustained improvement
* Client feedback indicates their respect for your services (work) provided and a good working relationship
* Effective client relationships are in place and stakeholders indicate high levels of satisfaction with service delivery
* Effective relationships are built and maintained with business sponsors and owners to facilitate the definition of requirements and acceptance of appropriate proposed solutions.

**People management:**

* Feedback from your line Manager confirms your contribution as a member of CRM team
* Feedback from colleagues and their teams confirms your contribution to an integrated Uniting
* Standards of professional behaviour demonstrate alignment with the Uniting values and are effectively role modeled in all workforce interactions

# THE IMPORTANT DETAILS

**Qualifications:**

* Possess a suitable / relevant tertiary qualifications in IT & Microsoft Dynamics OR relevant professional experience

**Your experience ticks the following boxes:**

* At least 5 years’ experience as working in Microsoft Dynamics CRM domain
* Proven track in the MS Dynamics CRM Agile implementations
* Experience in PwrApps
* Consulting experience in delivering CRM Programs
* Experience in Agile implementations
* Strong functional leadership and demonstration of industry best practice experience
* Proven analytical and documentation skills that will ensure we create high quality documentation and solutions
* Strong communication and collaboration skills – ability to communicate effectively and professionally with other team members and customers
* Time management skills and ability to set priorities, plan and organise – you are highly structured with an eye for detail and take pride in "on-time, every-time" delivery
* Ability to work flexibly in an exciting and rapidly changing environment
* Experience in business process and CRM systems
* An understanding of project delivery & acceptance processes, preferably within a Health or Aged Care environment
* Experience in mapping business processes and achieving process improvement in conjunction with systems implementation
* Proven experience in process improvement activities utilising Lean methodologies and tools and managing autonomous pieces of process improvement work
* Strong business/client engagement skills to gather information including interview and workshop facilitation skills with people who perform the business processes
* Strong analytical skills to analyse business processes and workflows
* Proficient in the use of analytic tools such as analysis, spread-sheets, flow-charting and process diagramming
* Proficient in developing simplified process maps and business requirements
* Experience in turning the complex into simplicity
* High level of competence with the standard Microsoft Office suite including Word, Excel, PowerPoint and Visio
* Experience documenting business requirements, developing instructional and procedural documentation and presentations

**Even better:**

* Possess Experience/Skill in Agile methodology
* Possess functional knowledge in other areas, for example Customer Portal, Telephony, Website, Data Governance, Integration
* Possess skills/experience in supporting Microsoft technology stacks
* Experience in not for profit sector

**Core Competencies:**

* You operate with personal integrity and a values base that aligns with Uniting’s
* You succeed through excellent communication skills and a high service orientation
* You engage successfully with clients and other team members as required
* You are capable but do not have “something to prove”
* You manage projects and juggle tasks to ensure delivery against objectives
* You have strong written and verbal communication skills
* You thrive on helping others to succeed; even if it is at a cost to you
* You are an exceptional team player
* You have a high level of energy and enthusiasm
* You leverage your experience without always referring to it
* You thrive on successful outcomes and not on processes
* You genuinely care about the organisation

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| **Employee Name:** |  | **Managers Name:**  **Title** |  |
| **Date:** |  | **Date:** |  |
| **Signature:** |  | **Signature:** |  |

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| ACCOUNTABLE POSITION | WHS ACCOUNTABILITIES  (AS PER WHS ACT 2011) | ACTION DEMONSTRATING ACCOUNTABILITIES |
| WORKERS (EMPLOYEES, AGENCY STAFF, CONTRACTORS, VOLUNTEERS, STUDENTS) | **While at work, all workers (WHS ACT 2011 Sec 28) must:**   * take reasonable care for his or her own health and safety * take reasonable care that his or her acts or omissions do not adversely affect the health and safety of other people * comply, so far as the worker is reasonably able, with any reasonable instruction that is given by Uniting to allow the * organisation to comply with this Act * co-operate with any reasonable policy or procedure of Uniting relating to health or safety at the workplace that has been notified to workers | **All workers must:**   * follow Uniting WHS policy and programs to protect the health and safety of people at work and to understand your personal responsibilities for WHS * attend and/or complete safety-related training including induction and emergency preparedness * comply with WHS instructions from your supervisor/manager, training information, safe work procedures and emergency wardens * if performing new or unfamiliar work, seek information, instruction or training and supervision from your supervisor to perform work safely without risking the health, safety and wellbeing of yourself or others * use equipment that has been provided for your health, safety and wellbeing * report all hazards, incidents and injuries to your immediate supervisor * participate in discussions/consultation about changes to workplace/premises or job task/practice * wear clothing, footwear and personal protective equipment (PPE) needed appropriate for the work being done * do not put other people’s health, safety and wellbeing at risk by your action or inaction |