



SENIOR TRAINER AND BUSINESS IMPROVEMENT SPECIALIST

DEPARTMENT/UNIT	Operations
FACULTY/DIVISION	External Relations, Development & Alumni
CLASSIFICATION	HEW Level 7
DESIGNATED CAMPUS OR LOCATION	Clayton campus

ORGANISATIONAL CONTEXT

Monash is a university of transformation, progress and optimism. Our people are our most valued asset, with our academics among the best in the world and our professional staff revolutionising the way we operate as an organisation. For more information about our University and our exciting future, please visit www.monash.edu.

The **External Relations, Development and Alumni** portfolio (ERDA) works collaboratively across the University to initiate, grow and steward strong person to person relationships with key stakeholders that support Monash University's research and education endeavours. In support of the University's strategic plan, [Impact 2030](#), ERDA oversees a range of activities to address the challenges of the age, including alumni relations, communications, philanthropy, external engagement, donor programs and community engagement activities for the University, nationally and internationally. To learn more about us and the work we do, please visit our [website](#).

POSITION PURPOSE

The Senior Trainer and Business Improvement Specialist works within the Operations team of ERDA and provides oversight of the use of alumni and donor focused data across its lifecycle. The role is responsible for monitoring and actively improving the use of the alumni and donor database, UniCRM Engage on Salesforce, and the quality of business processes associated with the system through a focus on continuous improvement.

The Senior Trainer and Business Improvement Specialist understands the ways of working within ERDA across the range of engagement and philanthropic activities, the data standards and protocols that must be adhered to, and the importance of high quality data, and communicates this effectively to users of the system. This role interprets stakeholder needs and translates these to sound business practices to ensure the use of the UniCRM Engage enables the achievement of University's [Impact 2030 strategic plan](#).

The position works in close conjunction with other members of the ERDA team, and with colleagues across the eSolutions and Enterprise divisions, to ensure the ongoing value and integrity of the data and the database, while advocating for the ongoing development of Advancement related enhancements. This position is

responsible for monitoring, provision and continuous improvement of training for users of the UniCRM Engage system, and associated tools.

This position is also required to participate in various data management projects, and providing back-up and support to other positions within the team during peak periods and when other team members are on leave.

Reporting Line: This position reports into the Data Integrity and Research Manager under broad direction

Supervisory Responsibilities: Not applicable

Financial Delegation: Not applicable

Budgetary Responsibilities: Not applicable

KEY RESPONSIBILITIES

1. Develop and maintain data management focused business procedures and processes, ensuring data integrity, and maintaining data confidentiality
2. Promote best practise of data captured in UniCRM, and through the use of a comprehensive audit program, ensure data entered is accurate and complete, and that service delivery is continuously improved
3. Monitor and identify non-compliance of data standards, and work with users to address issues both directly and through training. Working with colleagues, proactively resolve data quality issues, escalating University wide issues through the appropriate data governance channels
4. Using insights provided through dashboards, audit reports and user engagement, identify and drive continuous business improvement projects
5. Utilising insights from audit reports, user experience assessments and input from team members, co-ordinate and deliver a high-quality, comprehensive training program focusing on UniCRM Engage and related technologies
6. Proactively educate and train clients on how to maximise their use of UniCRM Engage and associated data, and advise of appropriate solutions for specific purposes. Investigate opportunities to further leverage alumni and donor data to develop, support and monitor activities to meet the challenges of the age as outlined in [Impact 2030](#), and to support ERDA to be a service orientated division and a centre of excellence in stakeholder and alumni engagement
7. Maintain positive and collaborative working relationships with team members, internal customers, and external stakeholders to maintain productive relationships with all areas of the University
8. Provide high levels of customer service in accordance with best practice guidelines, policy and procedures to drive successful engagement pipeline
9. Mentor Data Integrity and Research Administrators with a focus on operational efficiency and service excellence
10. Other duties as directed from time to time

KEY SELECTION CRITERIA

Education/Qualifications

1. The appointee will have:
 - A degree in a relevant field with subsequent relevant experience; or
 - extensive experience and specialist expertise or broad knowledge in technical or administrative fields; or
 - an equivalent combination of relevant experience and/or education/training.

Knowledge and Skills

2. Good understanding of alumni engagement and philanthropy activities in a Higher Education setting
3. Strong skills and experience with using CRM databases and/or customer relationship management systems including Salesforce
4. Demonstrated experience in analysing data and reports to show insights in system performance and design business process improvement
5. Demonstrated success in using conceptual, analytical and problem-solving skills, including the ability to quickly assimilate new concepts and information to deliver positive, innovative solutions
6. Extensive experience developing training programs, materials and documentation, including the delivery of individual, classroom and online training to users
7. Highly-developed interpersonal and communication skills, including the ability to liaise effectively with a wide range of stakeholders and facilitate working groups to increase business data literacy
8. Excellent interpersonal, communication and customer service skills with the ability to provide authoritative advice and effectively communicate and present complex information
9. Proven high level of attention to detail and excellent organisational skills with the ability to deliver multiple projects independently within tight timelines

OTHER JOB RELATED INFORMATION

- Travel to other campuses of the University may be required
- There may be a requirement to work additional hours from time to time
- There may be peak periods of work during which taking of leave may be restricted

GOVERNANCE

Monash University expects staff to appropriately balance risk and reward in a manner that is sustainable to its long-term future, contribute to a culture of honesty and integrity, and provide an environment that is safe, secure and inclusive. Ensure you are aware of and adhere to University policies relevant to the duties undertaken and the values of the University. This is a standard which the University sees as the benchmark for all of its activities in Australia and internationally.