

Tool #37: Guide to CRM Specialist Selection

Launching a CRM is a complicated process that requires technical expertise in data management, stakeholder coordination and training, vendor relationship management, and ongoing analysis. Furthermore, CRM implementation requires integrating data systems, mapping business processes (e.g., staff tasks) to CRM functions, maintaining data integrity, customizing the platform for the needs of user groups, tracking CRM use, and drawing conclusions about marketing and communication efficacy based on data analytics. A CRM project owner must take on these disparate responsibilities, and although a project owner may be responsible for an additional job function (e.g., web content developer), the COE Forum recommends carefully considering which existing staff or newly hired employee is best equipped to assume the role of “CRM specialist.”

This tool features a CRM specialist’s core job responsibilities and candidate characteristics as described by advanced CRM institutions. The tool will help COE and broader university leaders identify the characteristics desired in a candidate. A dedicated CRM specialist, with minimal job functions beyond operationalizing CRM, is appropriate for institutions pursuing a “tailored” or “extended” CRM implementation, according to the definitions in Tool #28: CRM Resource Intensity Comparison Chart.

Establishing a Reporting Structure for the CRM Leader

In an assessment of 14 CRM specialist position descriptions, including specialists working exclusively in COE units and those working university-wide, CRM specialists reported to one of the following departments: university marketing, COE unit marketing, university information technology, undergraduate admissions, or college/school-specific offices of recruitment. The advanced CRM institutions profiled in this tool advertised for CRM specialists serving varying scopes of the students and staff:

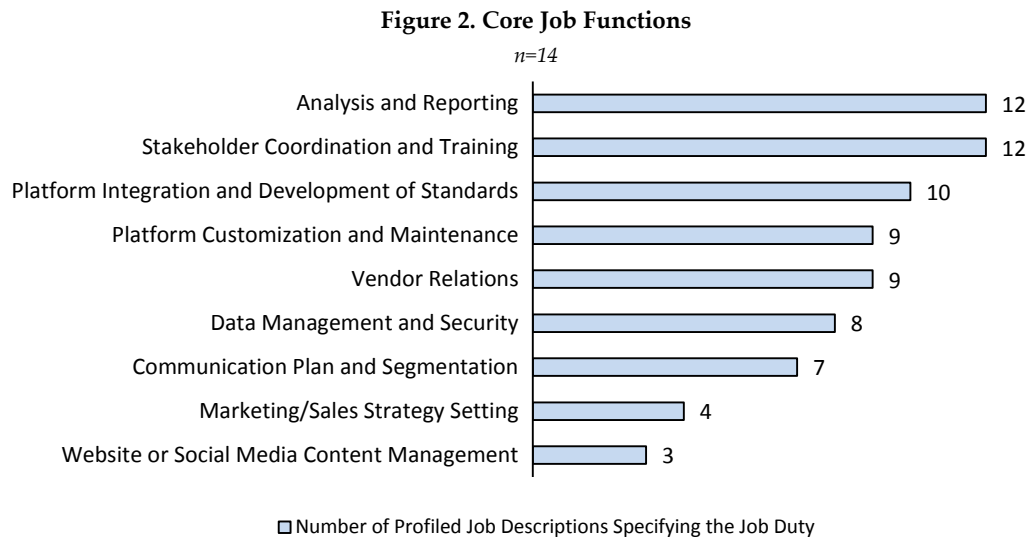
- COE Unit (one institution)
- Business school (three institutions)
- Undergraduate admissions (three institutions)
- University-wide, for traditional student population (4 institutions)
- University-wide, for adult student population (2 institutions, 3 positions)

Although, university-wide CRM implementations may be better resourced (and face challenges separate from those faced by COE units), there is still much to be learned from the job duties and reporting structures for these CRM specialists who serve the entire university. For example, all profiled job descriptions emphasize information technology, marketing expertise, or some combination thereof.

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Core Job Functions across 13 Universities

Because a CRM specialist role can incorporate both data management and marketing or communication duties, the core job responsibilities vary. The graph below describes nine commonly cited responsibilities and their frequency in 14 job descriptions at 13 universities.



Identifying Job Functions Important to You

Use the worksheet below when building a position description for a CRM manager.

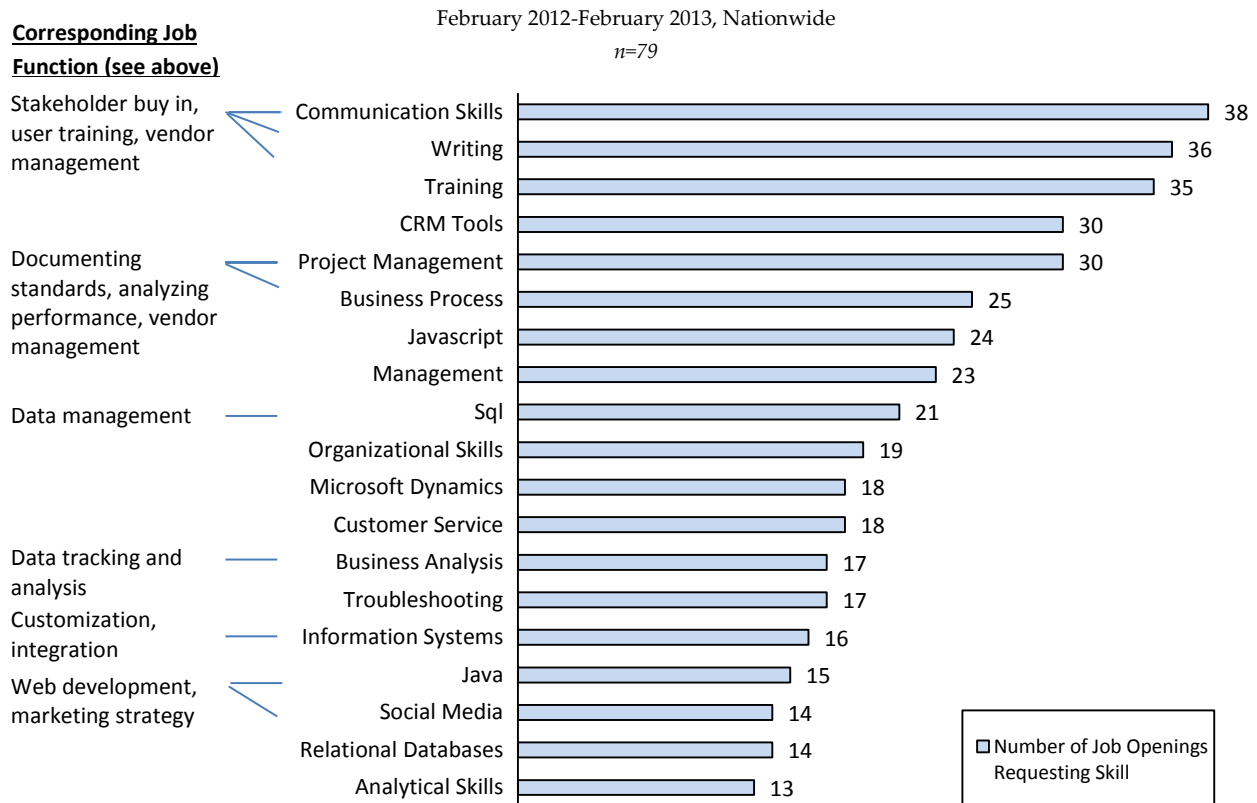
Position Description Builder Worksheet	
<ol style="list-style-type: none">1. Consider the job function described in Figure 2.2. Identify the functions that a CRM specialist at your unit should fulfill. Ascribe a rough percentage of candidate time that each duty should consume. Use Tool #36, Sample CRM Specialist Position Descriptions, as a guide.3. Complete the table below.	
Function	Percentage Time Consumed

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Required Candidate Skills and Experience

In an analysis of 79 job descriptions provided by Burning Glass Technologies Labor/Insight artificial intelligence tool, a query for CRM specialists at colleges, universities, and education service vendors showed that the following skills occurred most frequently across job openings. The notations to the left of the chart link required candidate skills to core job functions; as you can see, an ideal CRM specialist possesses a marketing background and has acquired some information and data management skills or is an IT expert who has learned marketing and communication strategy.

Figure 3. Desired Skills and Previous Experience for CRM Specialists¹



Candidate Evaluation Worksheet by Skill/Experience

1. Consider the skills and experience outlined in Figure 3.
2. Identify the skills and experience that a specialist at your unit should demonstrate. Ascribe a rough priority for each and evaluate job candidates according to selected skills and previous experience.

Desired Skills	Priority (1 – x)	How Does the Candidate Demonstrate that He or She Possesses Skill/Experience?

¹ Source: Burning Glass Technologies Labor/Insight

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Required Candidate Education and Years Professional Experience

Most job postings for CRM specialist in this analysis specify a minimum education and experience requirement. Consider the following benchmarks when specifying desired education and experience in a position description. Although not all job openings included in the analysis specified education or experience requirements, a majority require between one and four years of professional experience for CRM specialist candidates and a bachelor's degree.

Figure 4. Education Requirements for CRM Specialist Openings²

February 2012-February 2013, Nationwide

n=64

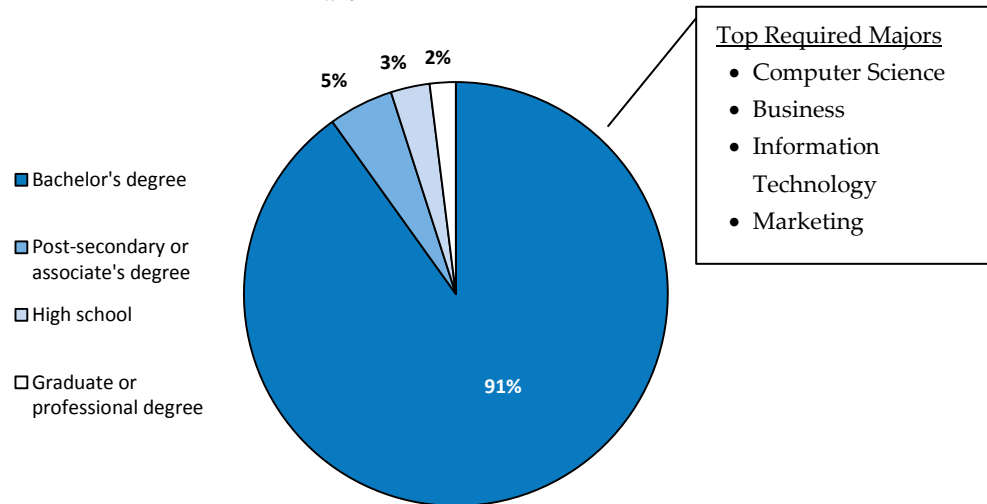
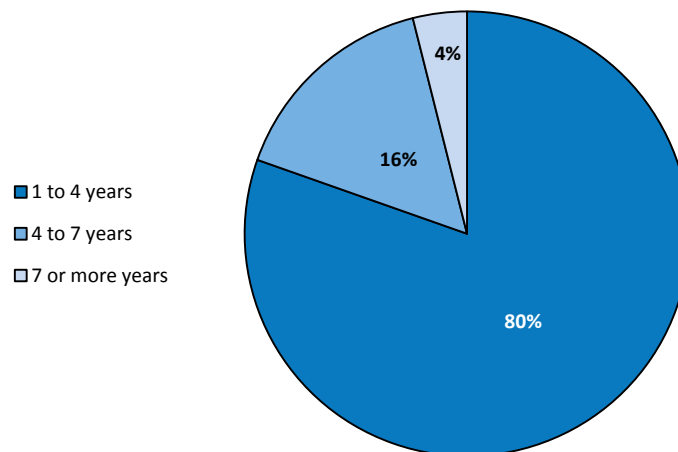


Figure 5. Required Years Professional Experience for CRM Specialist Openings³

February 2012-February 2013, Nationwide

n=51



² Source: Burning Glass Technologies Labor/Insight

³ Ibid.