



Job Description

The **UK Council for Psychotherapy (UKCP)** is the leading professional body for the education, training, accreditation and regulation of psychotherapists and psychotherapeutic counsellors. Our register of over 8,000 individual therapists is accredited by the Professional Standards Authority (PSA). As part of our commitment to work for public benefit, we strive to improve access to psychotherapy, to support and disseminate research, to improve standards and to respond effectively to complaints against therapists on our register.

Title	CRM assistant
Reporting to	CRM administrator
Direct Reports	None
Salary	£31,824 per annum (pro-rated for part-time)
Location	UKCP Office, York House, 221 Pentonville Road, London, N1 9UZ, and remotely

Aims

To support UKCP to achieve its strategic aims and objectives by maintaining UKCP's key regulatory tool – its accredited register – and to ensure high-quality data and embed smooth membership applications and renewals processes.

To work with the CRM administrator to support the ongoing maintenance and development of the Salesforce CRM, members' area and associated systems.

Main duties and responsibilities

- Act as a contact for the Salesforce database and related systems to ensure all users are fully supported. In liaison with the CRM administrator escalate faults and data protection concerns appropriately and in a timely fashion and take appropriate mitigating actions.
- Provide direct day-to-day support for Fonteva's Salesforce database including, but not limited to, managing user licences, setup, profiles, customisation of objects, fields, record types, page layouts and validation.

- Support the CRM administrator log and investigate issues and faults, and troubleshoot fixes and solutions, collaborating with teams and external vendors, so optimum performance and compliance can be maintained.
- Liaise with teams across UKCP to understand and map business processes (both membership and regulatory) and align CRM processes accordingly.
- Create, maintain and analyse dashboards and reports.
- Regularly audit and monitor the quality of data within the CRM and carry out daily and monthly database housekeeping tasks including regular de-duplication, data-cleansing, and disposal, in order to maintain compliance with relevant legislation and ensure accurate data is held to maintain the integrity of the UKCP register.
- Undertake monthly reconciliations to match Salesforce records with financial transactions.
- Work with the CRM administrator and external vendors to test and deploy patches, upgrades etc.
- Support the CRM administrator, and working closely with colleagues and subject matter experts, identify, develop, improve and deploy processes and CRM features in line with business need, testing in a sandbox environment before launch.
- In liaison with the CRM administrator and the membership team create and maintain user guides and system documentation and deliver CRM training to staff using Salesforce.
- Undertake basic membership administrative duties, especially during the busy renewals period (August – October).

This is not an exhaustive list and you are required to be flexible in your approach to carrying out your duties which may change from time to time to reflect changes in UKCP's approach to a culture of continuous improvement.

Person Specification

Essential

- Working knowledge or experience of supporting, administering or managing CRM databases, preferably Salesforce.
- Understanding of user experience, user journeys and business processes.
- Experience in building and analysing reports and dashboards.
- Troubleshooting and investigative skills, including good analytical and problem-solving skills.

- Experience in data management, cleansing and monitoring data.
- Excellent team player with the ability to provide guidance and support to colleagues.
- Strong organisational skills and a meticulous eye for detail.
- Excellent communication skills, both written and verbal, and the ability to produce accurate documents such as training guides.
- Self-driven with a positive attitude and a strong customer focus.
- Organised and methodical, with an aptitude for logic.
- Commitment to equity, diversity and inclusion and ability to put this into practice.

Desirable

- Experience of Salesforce support and/ or administration.
- Experience of Fonteva Association Management Software.
- Good negotiating and persuasion skills and an ability to work with a variety of people at different levels
- Experience of working in a regulated environment.
- Experience of working for a professional membership body.

Our values

Our values are central to us.

We recruit according to these values, appraise our people against them, embed them in our working practices with colleagues, ensure that UKCP's practice is continually informed by them and measure our impact against them.

- We believe in working with **integrity** throughout the organisation.
- We are **innovative** in our approach to member support and ensuring high standards of practice.
- We ensure that our policies are **informed by data and evidence**, wherever possible.
- We **recognise the pluralism of the modality traditions** upon which psychotherapy is based and encourage dialogue to promote understanding.
- We aspire to be **courageous and inquisitive** in the way we work.

- We seek to be **inclusive**, recognising the diversity of the society in which we live and work, and we strive to have respect for everyone we work with.
- We aim to **work collaboratively** with other organisations when it is in the public's interest to do so.
- We are **reflective** and seek to learn when things do not go as expected.