

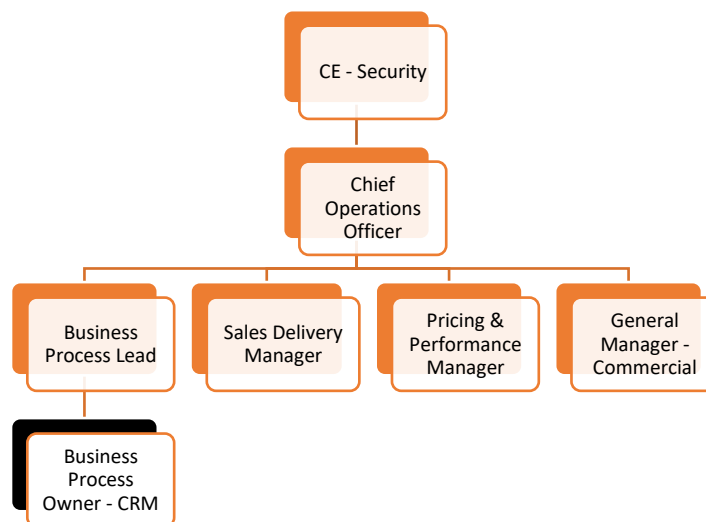
## POSITION DESCRIPTION

<b>Position Title:</b> Business Process Owner – CRM	<b>Direct Manager:</b> Business Process Lead	
<b>Budget Responsibility:</b> Nil	<b>Direct Reports:</b> 0	<b>Indirect Reports:</b> 0

### WHAT YOU'RE HERE TO ACHIEVE

The Business Process Owner – CRM position is designed to support the design, development, and implementation of business processes within the Global Security Business Unit overseeing the strategic alignment and continuous improvement of the Customer Relationship Management (CRM) system. The primary goal is to enhance efficiency and meet the demands of the sales pipeline. This role involves bridging the gap between business needs and technology solutions by gathering, analysing, and documenting business requirements, and facilitating communication between stakeholders, project managers, and development teams. The Business Process Owner will take ownership of the CRM system, ensuring data integrity and consistency, and supporting process improvements to drive continuous improvement and global alignment

### WHERE YOU'LL FIT IN #TEAMGALLAGHER



### WHO YOU'LL BE WORKING WITH

INTERNAL RELATIONSHIPS	EXTERNAL RELATIONSHIPS
Security Executive Team Security Operations Teams Security Global Sales Teams Solution Delivery Team Marketing Information Services Gallagher Support Services (i.e. Finance, Legal, P&B)	Vendors Business Process Consultants Channel Partners End Users

## WHAT YOU'LL BE DOING

Key Accountability	Outcomes/ Expectations
<b>CRM Management:</b> <i>Ensure business process requirements relating to the CRM are consistently adhered to globally</i>	<ul style="list-style-type: none"> <li>Analyse and resolve CRM issues through timely analysis and resolution of functional issues affecting CRM users.</li> <li>Support CRM strategic planning by collaborating with CRM partners to support continuous improvement, process creation, and streamlining activities in CRM and related systems aligned to business goals.</li> <li>Analyse CRM usage and provide Insights through reporting and analysis of CRM usage and adoption, identifying opportunities for improvement.</li> <li>Develop and maintain CRM documentation by creating, updating, and maintaining CRM process documentation, how-to guides, and training materials, ensuring global standardisation and adoption.</li> <li>Facilitate regional CRM champions by supporting regional CRM champions and ensuring workflows and processes to drive continuous improvement are in place and global alignment is at the centre of work to be done.</li> <li>Collaborate with business stakeholders to identify, capture, and document detailed business requirements, processes, and objectives. Conduct interviews, workshops, and other methods to gather necessary information.</li> <li>Manage CRM operations and improvements by overseeing the day-to-day functions, manage CRM improvement activities and service requests as well as act as a liaison between the Security and Gallagher Support Services teams to identify gaps or improvement opportunities and coordinate process and system improvements.</li> <li>Maintain and improve data management processes by administering procedures and process improvements with a comprehensive understanding of business and systems interactions and dependencies.</li> </ul>
<b>Business process improvement:</b> <i>Lead and support the process to understand business and customer needs and recommend feasible solutions to the problems identified</i>	<ul style="list-style-type: none"> <li>Identify opportunities for process improvements, automation, and optimisation within business processes related to CRM. Propose solutions that enhance efficiency and effectiveness and promote global alignment.</li> <li>Analyse processes to identify gaps, inconsistencies, and potential challenges. Work closely with stakeholders globally to clarify and prioritise requirements, ensuring they are streamlined, feasible, complete, and aligned with strategy.</li> <li>Assess implications and risks of recommendations.</li> <li>Adopt holistic thinking of impacts on wider business and/or future business direction.</li> <li>Utilise data to make adequate, informed decisions. Work with the business to cleanse data related to CRM, ensuring a “clean data” approach to all tasks and processes.</li> <li>Facilitate the review of standard systems and future programs to drive continuous improvement and drive efficiency.</li> <li>Support change management processes across the business.</li> </ul>

<p><b>Project Lead:</b>  <i>Drive the end-to-end management of CRM related projects to enable a high level of stakeholder engagement and effective progress tracking and reporting</i></p>	<ul style="list-style-type: none"> <li>• Drive the change management and implementation activities for CRM, including raising, approving, and implementing changes related to the CRM sales and services processes, completing User Acceptance Testing, and ensuring smooth transition from project to Business as Usual (BAU) with sign-off and acceptance of BAU responsibilities.</li> <li>• Lead projects from the Security team's perspective by taking ownership of the direction and steps taken in projects, including the implementation of new processes and ensuring that the needs and requirements of the Security team are heard and addressed.</li> <li>• Collaborate with development teams to design effective solutions that address business needs. Provide input into the design process by offering insights based on the business requirements and industry best practices.</li> <li>• Serve as a liaison between business users, project managers, and development teams by taking the project lead role for the Security business. Facilitate effective communication by translating technical concepts for non-technical stakeholders and vice versa.</li> <li>• Collaborate with project managers to ensure that projects are executed on time, within scope, and within budget. Provide input into project planning, status updates, and risk assessments. Raise issues to the attention of the project team promptly, proposing solutions as appropriate.</li> <li>• Provide updates when implementation is pivoting from agreed recommendation and probable impact on outcomes.</li> </ul>
<p><b>Continuous Improvement:</b>  <i>Commitment to staying up to date with trends and developments that could improve business processes</i></p>	<ul style="list-style-type: none"> <li>• Be proactive in developing and continuously improving knowledge and skills.</li> <li>• Take responsibility for your own learning and development through a process of assessment, reflection, and action.</li> <li>• This includes but is not limited to:             <ul style="list-style-type: none"> <li>▪ engaging proactively with any training provided</li> <li>▪ applying the Agile principles and techniques to project work as applicable</li> <li>▪ being a positive, willing, contributing, and adaptable member of the team at all times to help the company move to the flexible delivery model.</li> </ul> </li> </ul>

Including any other duties not specified that may be required to complete the role, and as requested by the Reporting Manager.

## HOW YOU'LL BE DOING IT

### **Qualifications, Skills and Experience:**

- Experience managing CRM systems and related process documentation and improvements, ideally with experience of supporting an implementation of a new CRM system
- Proficient in CRM software (preferred Salesforce modules) and knowledge of industry best practices.
- Strong analytical skills with the ability to dissect complex problems and propose innovative solutions.
- Excellent communication skills, both verbal and written.
- Project coordination/ lead experience, including ability to interact effectively with diverse stakeholders for a common purpose.
- Preferred experience in project management methodologies.
- Demonstrated experience in business transformation and managing change (including technology enabled change).
- Detail-oriented with a high level of accuracy in documentation.
- Ability to work both independently and as part of a cross-functional team.
- Strong Microsoft Office and task tracking tools experience and skills.
- Preferred experience with Agile principles.

### **Behavioural Competencies:**

- Forward thinking, operating one step ahead to anticipate opportunities and challenges.
- Demonstrates the ability to think strategically by analysing complex situations, anticipating future trends, and making decisions that align with the long-term goals and objectives of the organization.
- Makes sense of complex, disparate information and appropriately analyses risk to inform clear, considered decision making in an ambiguous, changing environment.
- Welcomes feedback from others and adopts a reflective practice to identify and develop areas requiring growth.
- Works collaboratively to enhance team spirit and overall team output, sharing knowledge and experience to help develop the team.
- Structured and well organised, with the ability to work on more than one project at a time employing good time management and prioritisation skills to ensure delivery.
- Passion for continuous improvement and bringing people together on a journey.

# Protect what matters most.

Our purpose and our values apply to our extended Gallagher family including our employees, customers, partners and community.

