

JOB DESCRIPTION

Role Title	Data Management and Reporting Officer		
Directorate	Delivery		
Team	Wales		
Line Manager	Advice Centre Manager		
New/ Existing Role	Existing		
Permanent/ Fixed Term	Fixed term	Grade	
Job Purpose	This role will provide support to the Wales team in the delivery of individual or aggregated customer information, primarily to report to programme funders. This role will manage and create reports for key internal and external stakeholders and contractors. In particular this role will manage Nest reporting and referrals to Nest partners, ensuring that data quality remains high.		
Resource Management Responsibilities	Budget/ Equipment Accountabilities	People (EST) Accountability	Contractor Accountability
	Nil	Nil	Nil
Critical Accountabilities (between 4-8)	<ul style="list-style-type: none"> • Extract, verify and transmit client referral data between the advice centres, EST and delivery partners • Liaise within EST and to external delivery partners to ensure the correct data format and interpretation are provided. • Produce timely information, data and statistics to report internally and to external delivery partners on the performance of Nest and other Advice projects • Provide advice and guidance to EST colleagues on Nest/Advice Team related issues to help them interrogate and understand the data held in the CRM system • Write and manage SQL reports as and when required to extract information and import data into MS Dynamics CRM System and other internal data systems • Act as CRM System upgrade contact, developing CRM requirements and ensuring continuous improvement of the system and the way it is used • Scrutinise data entry into the Customer Relationship Management tool to improve the quality of information recorded • Produce charts, tables, and data to support the production of end of year reports. • Drive the implementation of process documentation and automation to ensure business continuity in your absence. 		

Competency Requirements	Level 1	Level 2	Level 3	Level 4
Communication, interpersonal and negotiation skills			X	
Financial and commercial acumen				X
Delivering results				X
Applying knowledge and expertise			X	
Customer Focus			X	
Change Management				X
Managing People				X
Team Working			X	
Knowledge, skills and qualifications required	<p>Skills:</p> <ul style="list-style-type: none"> • Good organisational and administrative skills • Ability to work with minimal supervision • Ability to prioritise tasks within a demanding environment • Excellent verbal and written communication skills • The ability to communicate difficult subject matters easily • Be enthusiastic to learn and have a desire to develop new skills and knowledge • Result-orientated, with a Team player approach. <p>Must have:</p> <ul style="list-style-type: none"> • Good IT skills (Microsoft Office suite, Internet, use of databases) • Experience of using Customer Relationship Management (CRM) systems and managing data • Extraction and manipulation of data using advanced Excel functions (including macros) and Access, from multiple sources. • Experience in the development of management information reports using Excel and Access • Experience in encrypting email and data files • Experience with management, reconciliation and correction of data exceptions. 			

	<ul style="list-style-type: none">• Experience and confidence in writing queries in Transact SQL 2008 or later.• Experience of using both data export and import managers• 5 or more GCSEs, Scottish Standard Grades, NVQ Level 2 or equivalent
	<p>Desirable:</p> <ul style="list-style-type: none">• Knowledge and understanding of energy efficiency and renewable energy• Familiarity of Welsh Geography.• Welsh speaking