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Title: CRM Manager
Reports To: VP Technology, Analytics & Strategy
Effective Date: 10/19/2021

Position Summary: The CRM Manager is responsible for the administration of the company's CRM platform. He/she will work with internal stakeholders to implement and enforce business processes supported within the platform and oversee any additional development on the platform. The ability to work closely with multiple teams and leaders within the organization to implement and drive adoption of the new platform will be critical. Additionally, ensuring a highly optimized, available, and integrated environment is essential to the success of this platform within the company.

Job Specific Duties and Responsibilities:

- Primary CRM administrator
- CRM application configuration and development
- Creation and maintenance of business workflows within the CRM platform
- Creation of reports and dashboards within the CRM platform
- Define and enforce data hygiene policies within the CRM platform
- Regularly dedupe and enrich the customer database
- Manage data integrations between CRM platform and other disparate data sources
- Optimize data collection efforts
- Monitor user adoption and usage rates
- Implement strategies to assist user adoption
- Develop end user training materials that define proper and expected use
- Perform CRM training and on-boarding as necessary
- Suggest business processes leveraging CRM capabilities that create efficiencies within the organization
- Will pursue appropriate certifications to advance understanding of CRM methodologies

Qualifications:

Required:

- Bachelor's degree in Business Administration, MIS, or similar field
- 3+ years of CRM administration experience
- Understanding of data integration processes and relational databases
- Proficient with Microsoft Office products

Knowledge, Skills, and Abilities:

- Strong presentation and communication skills
- Ability to effectively collaborate with multiple departments
- Strategic planner
- Analytical
- Positive attitude
- Proactive

Who We Are:

Helix is a value-based, state-of-the-art clinical laboratory on a mission to elevate the lab space through compliance, high ethics, innovation and a best in class client experience. Helix incorporates the latest technology and methods to provide comprehensive diagnostics including toxicology testing, pathogen detection, blood testing and Pharmacogenomics (PGx) testing.

Expected Use and Disclosure of Protected Health Information:

Employees in this position are expected to have access to protected health information and other confidential business information from throughout the organization as is needed to fulfill their responsibilities in evaluating and reducing risk to the organization. No protected health information will be disclosed outside the organization unless specifically required by state or federal law.

*This document is intended to describe the general nature and level of work performed and the requirements of the position. It is not intended to serve as an exhaustive list of all duties, skills and responsibilities of personnel so classified; nor is it intended to limit the right of any leader to assign or direct employees under his/her direction.