

CRM and Data Systems Assistant

Salary: £25,000–£35,000 per annum, depending on experience

Location: Remote working (UK based). Occasional travel to meetings and company events may be required. RSAcademics is a remote-working organisation.

Reports to: Data and Systems Manager

Role purpose

The CRM and Data Systems Assistant supports the effective operation of RSAcademics' CRM, survey and business data systems, ensuring that information is accurate, well structured and accessible.

The role involves substantial hands-on responsibility for data extraction, manipulation, cleansing, validation and reporting, working across multiple systems and datasets to support business operations, consultancy projects and decision-making. The postholder will help ensure the quality and reliability of organisational data, support CRM administration and produce accurate outputs for internal and client-facing use.

The role also acts as deputy to the Data and Systems Manager where required, helping to maintain continuity across key data and systems processes.

Role scope

The role operates across CRM and other company data collection, analysis and reporting systems or tools, supporting both routine operational activity and project-based work. Working closely with the Data and Systems Manager, the role has responsibility for delivering defined tasks and contributing to the consistency and quality of data and processes.

The role requires a high degree of accuracy and attention to detail, with responsibility for handling large and complex datasets, preparing information for reporting and analysis, and supporting the day-to-day operation of key business systems.

The CRM and Data Systems Assistant will work closely with colleagues across the business, providing practical support and ensuring that data and reporting needs are met consistently and efficiently.

The role does not hold overall system ownership but is responsible for the accurate and timely execution of agreed activities.

Key responsibilities

1 Data Management and Reporting

- Extract, manipulate, cleanse and validate data from CRM systems and other business platforms.
- Maintain accurate, complete and reliable data across business systems.
- Identify, investigate and resolve data discrepancies and quality issues.
- Prepare datasets for reporting, analysis, research and consultancy projects.
- Produce accurate data outputs, reports and management information.
- Create and maintain data tables, spreadsheets and reporting templates.
- Support the development and maintenance of dashboards and reporting tools.
- Ensure data is handled consistently and in accordance with agreed processes.

2 CRM and Systems Administration

- Support the day-to-day administration of the CRM and associated business systems.
- Maintain records, user permissions and system data structures.
- Provide user support and resolve routine queries and issues.
- Assist with system testing, configuration updates and implementation of agreed enhancements.
- Maintain documentation and guidance materials relating to systems and processes.

3 Survey and Research Support

- Set up and administer surveys using agreed platforms.
- Manage survey distribution and monitor response activity.
- Prepare survey data and outputs for analysis.
- Support colleagues with data preparation for research and consultancy projects.
- Assist in the use of external datasets and benchmarking information.

4 Deputy Responsibilities

- Act as deputy to the Data and Systems Manager as required.
- Provide continuity of support during periods of absence.
- Support the management of agreed operational priorities.
- Take responsibility for designated systems, reporting activities or processes when required.

5 Process Support

- Follow established processes and procedures consistently.
- Contribute practical suggestions to improve data quality and accuracy.
- Support the implementation of agreed system, reporting or workflow enhancements.

Person Specification

Essential	Desirable
Experience of working with CRM systems in an administrative, operational or analytical capacity.	Experience supporting surveys, research projects or data collection activities.
Experience of working with relational databases or relational data systems.	Experience producing dashboards, management information or visual reporting outputs.
Experience of extracting, manipulating, cleansing and validating data from multiple sources.	Experience within a professional services, consultancy or education environment.
Experience in producing reports, management information or analytical outputs to support decision-making.	Understanding of data governance and data quality principles.
Experience of working with large and complex datasets.	Experience supporting colleagues in the use of business systems and data.
Advanced Microsoft Excel skills, including formulas, lookups, pivot tables, data validation and analysis.	Salesforce experience.
Strong data manipulation, data management and data quality skills.	Power BI or similar data visualisation tools.
Ability to organise, structure and present data clearly and accurately.	Alchemer or equivalent survey platforms.
Ability to identify, investigate and resolve data quality issues.	Displayr or similar analytical tools.
Confidence working across multiple systems and datasets simultaneously.	Experience of reporting, business intelligence or automation tools.
Exceptional attention to detail and commitment to accuracy.	
Strong analytical and problem-solving skills.	
Excellent organisational skills and ability to manage multiple priorities.	
Ability to work independently and effectively in a remote-working environment.	

Essential	Desirable
Ability to build productive working relationships across teams and functions.	
Strong written and verbal communication skills.	
Collaborative and service-oriented approach to supporting colleagues.	
Proactive and methodical approach to work.	

Development scope

The role is expected to take on increasing responsibility for defined areas of work over time, including greater ownership of routine processes and elements of data and system support, as capability develops.