

<b>Job Title</b>	Consultant
<b>Location</b>	Hart Square offices and client sites
<b>Reports To</b>	Practice Manager

## **ABOUT HART SQUARE CONSULTANCY**

Hart Square is a leading provider of consulting services to not-for-profit (NFP), professional membership and fundraising organisations, charities, trade associations and the education and healthcare sectors. It enables organisations to maximise their investment in Customer Relationship Management and other technologies by offering a range of consulting services.

## **PURPOSE**

You will be responsible for leading multiple, large projects that deliver business transformation through digital and technology enabled change. This will often mean running projects concurrently, ie one or two days per week on one project, with another two or three days on another. We believe that Customer Relationship Management (CRM) is a combination of strategy, people, processes and culture, underpinned by technology. Your role is to maximise our clients investment in CRM and associated technologies through consultancy which will include; Business Process Reviews, Technology Audits, Vendor Selection, Implementation Support, Strategies and Training. Knowledge of Microsoft Dynamics CRM and/or other modern CRMs would be a plus

## **RESPONSIBILITIES**

The key elements of the role include:

- establishing and understanding the needs of the client, through conversation, analysis and research to create a strategy to achieve the best digital solution, including systems integration
- creating an outline of the business needs and the digital solutions to make a compelling business case
- developing process models of clients' current processes with recommendations for change, including a review of existing systems functionality
- once the Statement of Works has been agreed, continually working with the client to ensure they are up-to-date with progress, impact and timescales
- actively project managing the process so each element is delivered to time and budget
- ensuring the correct Hart Square methodology is used in line with the Statement of Works and to the Hart Square Quality policy
- being aware, discussing and solving client problems
- developing productive and valued relationships with clients through ownership, communication and reliability
- taking full responsibility for projects from internal handover to completion
- creating project documentation including requirement specifications, reports and proposals
- conducting Business Process Reviews, Technology Audits, Vendor Selection, Implementation Support as appropriate as well as the associated strategy and training
- working collaboratively with the Business Development team to ensure a trusted advisor relationship
- representing Hart Square in a professional manner at all times, promoting the company as a centre of excellence
- contributing to projects being managed by other Hart Square staff as required
- contributing to the development of proposals to clients on request
- fully documenting all projects within your responsibility for both the clients and for Hart Square's benefit

	<b>Essential</b>	<b>Desirable</b>
<b>Qualifications</b>	Educated to degree level or equivalent.	
<b>Experience</b>	<p>Knowledge of Client Relationship Management systems.</p> <p>Knowledge and practical application of different project management tools.</p> <p>Experience of conducting Business Process Reviews, Technology Audits, Vendor Selection, Implementation Support, Strategies and Training.</p> <p>Ability to build strong client relationships.</p> <p>Strong financial management, analytical and commercial skills.</p> <p>Proven ability to deliver effective digital solution related training.</p>	Experience in the not for profit sector.
<b>Motivation</b>	<p>Able to work alone, take ownership and accountability to offer proactive solutions to client issues.</p> <p>Is energetic and enthusiastic with a strong will to succeed.</p>	
<b>Judgement</b>	<p>Creates a project plan which meets the client's requirements and takes into account all elements of the project.</p> <p>Considers and explains risk and the impact of opting for particular options or delivery outcomes.</p> <p>Has learnt from experience and is using this experience to generate business improvements.</p>	
<b>Credibility and communication</b>	<p>Builds effective relationships with team and stakeholders.</p> <p>Can facilitate discussions between individuals or groups in internal and external context.</p> <p>Can adapt style of communication to persuade and influence different audiences.</p> <p>Keeps relevant parties informed of progress and costs both verbally and through written reports.</p>	
<b>Resilience</b>	<p>Can deal with demands of the role without pressurising others or behaving disruptively.</p> <p>Can balance and prioritise conflicting demands while maintaining good judgement and a sense of perspective.</p> <p>Remains balanced and rational in dealing with others at all times.</p>	
<b>Teamwork</b>	<p>Demonstrates energy and team spirit that enhances goal attainment.</p> <p>Contributes to an open and supportive culture.</p>	
<b>Organisation</b>	<p>Manages own time and completes multiple tasks/assignments with potentially competing deadlines.</p> <p>Properly documents tasks and procedures and works in a logical, systematic and precise way.</p>	