

Position Description

Position title:	Microsoft D365 Administrator
Position type:	Fixed Term Contract (ASAP– 24 December 2024)
Location:	Zealandia, 53 Waiapu Road, Karori, Wellington
Supervisor:	General Manager Commercial Development

Purpose of the Role

Zealandia has recently gone live with a new CRM, and this role will be key to supporting smooth implementation of the product. The role will carry out administration of a Microsoft D365 CRM, including updating and maintaining accurate customer records, managing customer/supplier data, and creating reports/dashboards for SLT reporting. Additionally, they will be responsible for training new staff on how to use the CRM system and troubleshooting any issues that may arise. They will work closely with the all internal end-user teams, including the Visitor Centre and those looking after memberships and supporters.

They will connect with all levels of staff to help facilitate training, including design and development of dashboards and reports. This role will be a leading frontrunner in implementing CRM within our organisational systems as well as training facilitation. As requested by other areas of the business and where time allows, the role will also support the organisation to resolve minor IT requests and enable Zealandia’s staff to upskill their knowledge of our current software.

Like all members of staff at Zealandia, the person in this role will be expected to actively uphold the principles of Te Tiriti o Waitangi, maintain and promote exceptional health and safety, and support the maintenance of biosecurity in the sanctuary.

Organisation Background

Zealandia is an organisation that cares for Te Māra a Tāne, a world class ecosanctuary in Wellington, New Zealand. We have a 500-year vision to restore a unique 225ha forested valley—Te Māra a Tāne. Zealandia’s first generation of restoration effort has resulted in flourishing forests and the establishment of many native species, from hihi to tuatara. Looking forward, Zealandia’s next generation is focused on [‘Living with Nature—Tiaki Taiao, Tiaki Tangata’](#). *“We connect people with our unique natural heritage and inspire actions that transform how people live with nature in our cities, towns and beyond”*. This purpose is visible through our leading education, conservation, restoration and engagement activities.

Zealandia is a not-for-profit organisation, and its conservation, restoration and outreach work is made possible by an award-winning sustainable business model. Funding currently comes from visitors and

tours, our café, memberships, grants, sponsorships and donations. Every role in the organisation has some part to play in ensuring our 130,000+ visitors, 500+ volunteers and 11,000+ members are cared for and welcomed into the Zealandia community.

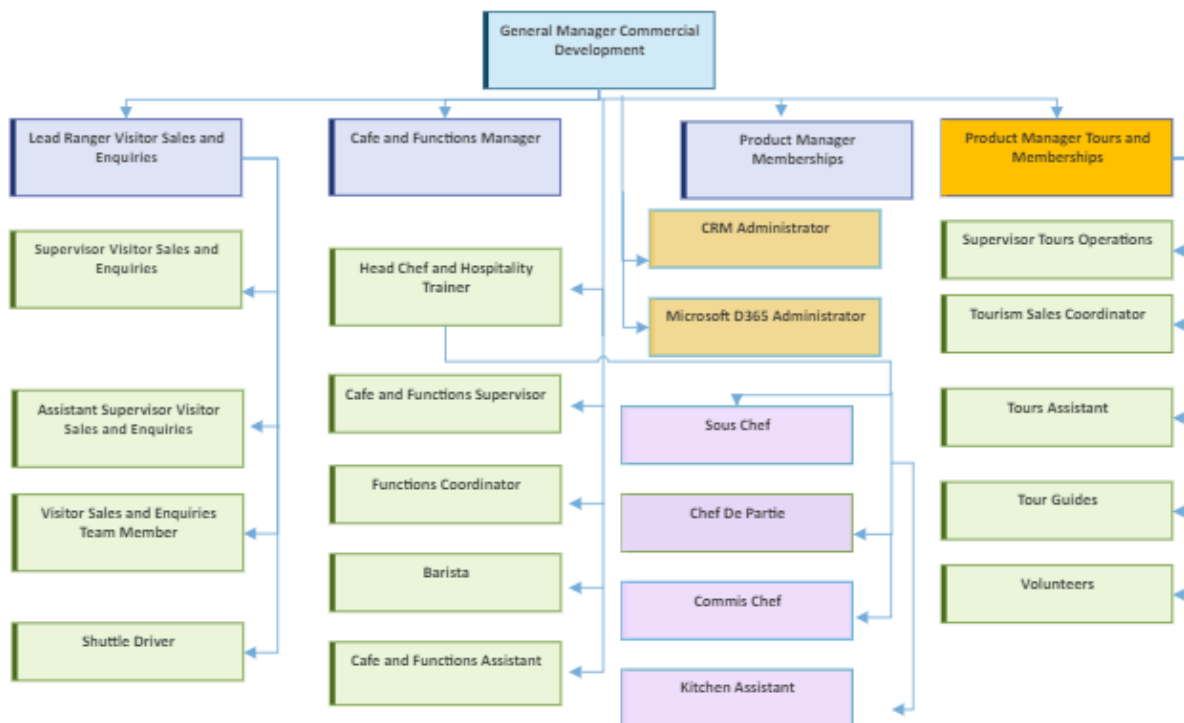
As an organisation we honour Te Tiriti o Waitangi are on a journey towards learning how this plays out across our work as Tiriti partners. We accord value to te ao Māori (the Māori world), and support mana whenua to fulfil their role as kaitiaki. All staff are encouraged to build capacity and confidence across te ao Māori including te reo Māori me ōna tikanga, and Te Tiriti o Waitangi.

The Zealandia Team

Zealandia is a medium size organisation, with around 100 people employed in different contexts. We pride ourselves on exceptional teamwork which is required from all staff, volunteers and members. The dynamic nature of Zealandia means it is an incredible place to extend and challenge yourself, have real on-ground outcomes for conservation and community engagement, and to be part of a successful team. Zealandia is managed by the Karori Sanctuary Trust. To find out more please go to www.visitzealandia.com/

The Commercial Development Team

The Commercial Development team manages operations that generate commercial revenues for Zealandia. This includes management of membership products, tours, Rata Café, functions, the gift shop, and admissions to the sanctuary.



About this Position Description

As Zealandia’s work and priorities change over time, so will the requirements of each of its staff. As such, this document is not intended to represent the role that the occupant will perform in perpetuity. This position description is intended to provide an overall view of the role and responsibilities as at the date of approval. The specifics of the role will be reviewed on a regular basis and adjustments may be made to key responsibilities and accountabilities.

This position description details the minimum outcomes required for the position and for employment. Zealandia is a seven day per week operation. After-hours and weekend work will be required from time to time. A non-smoking policy is effective on sanctuary land, with the exception of a designated smoking area.

Key Responsibilities

1. Microsoft Dynamics CRM
<ul style="list-style-type: none"> • Maintain and improve where necessary data quality within the CRM system by cleansing and enriching data on a regular basis • Configure the CRM system to meet the specific needs of internal teams, customers, and products, including customizing fields, workflows, objects, reports, and page dashboards • Assist with the implementation of product pricing changes and new product set up • Train new users on the CRM system and provide ongoing support to existing users • Generate reports and dashboards to track key performance indicators and help users make better data-driven decisions • Stay up to date on CRM best practices and new features/functionality to ensure that the system is being used to its full potential • Work closely with other departments (e.g. marketing, sales, finance) to understand their needs and ensure that the CRM system meets their requirements • Serve as the point of contact for CRM-related issues, working with the CRM vendor to resolve any technical problems • Import and export data from the CRM system as needed • Perform regular backups of CRM data • Develop and implement processes and procedures for managing CRM data • Monitor CRM usage metrics to identify trends and areas for improvement • Keep abreast of new CRM technologies and developments • Connect with Zealandia’s CRM service provider, to ensure emerging product development meets Zealandia’s needs. • Manage the <i>Visitors Centre</i> and <i>Membership</i> email inboxes on a daily basis, responding to member and general public inquiries.
2. IT Support, Visitor Centre support
<ul style="list-style-type: none"> • Respond to organisation IT requests and software training requests from the Corporate Services division as capacity allows. • Liaison with third party suppliers to manage IT job requests for the membership website pages, membership portal, and CRM.

<ul style="list-style-type: none"> • Manage the <i>Visitors Centre (VC)</i> and <i>Membership</i> email inboxes daily, responding to member and general inquiries. • Provide Visitors Centre support, including greeting customers, processing sales, administering memberships, and open and close processes where capacity allows. • Manage the VC Inbox as a priority, including all emails and member comms, renewal letters printing, gift memberships, retail orders, printing membership cards, etc. • Complete renewal phone calls with Members, including check-in calls following expiry dates.
<p>4. Relationships</p> <ul style="list-style-type: none"> • Foster positive working relationships with IT and CRM external service providers to Zealandia. • Attend standup meetings as required by the software developers and project managers. • Maintain a customer-focused outlook on CRM and IT work, ensuring all users across the organisation are well supported. • Establish and nurture sound working relationships with all Zealandia staff. • Contribute to the overall organisational strategy and business plans. • Embrace the Karori Sanctuary Trust’s policies on environmental consciousness and sustainability. • Where opportunities to work with volunteers arise, foster positive and productive engaging relationships.
<p>5. Health and Safety</p> <ul style="list-style-type: none"> • All employees have a responsibility to work towards keeping a safe and healthy work environment by practising safe work methods, identifying workplace hazards and using appropriate safety equipment. • Adhere to Zealandia’s code of conduct to support a healthy, safe and enjoyable work environment. • Ensure health and safety is addressed in day-to-day activities for yourself and all staff and volunteers working alongside you. • Address promptly any responsibilities assigned to your area by the Health and Safety Officer.
<p>6. Biosecurity</p> <ul style="list-style-type: none"> • We have a shared responsibility that the valley is maintained as an environment free of key animal and plant pests, allowing restoration progress to be made against the 500-year vision. • All employees must take Zealandia’s biosecurity seriously, so the risk of accidental introductions is minimised. • Ensure all staff, visitors, schools and groups adhere to biosecurity processes.

NOTE: the above responsibilities and expectations are provided as a guide only. The precise performance measures for this position will need further discussion between the jobholder and manager as part of the performance management process.

Key Relationships

Internal:

- General Manager Commercial Development

- Membership Programme Advisor
- General Manager Corporate Services
- Chief Executive
- Other leadership within Zealandia.

External:

- Third party vendor
- Suppliers
- Zealandia Members

Person Specification

The preferred candidate will have experience in dealing with CRM management. They will be a confident communicator, with a customer service focus on building exceptional relationships. They will have 2-3 years' experience working with Microsoft Dynamics 365 and similar apps within the Microsoft Suite, such as Customer Insights and Customer Voice. They will have 2-3 experience in Administration over Microsoft Products (Dynamics, Office 365, Microsoft Teams, SharePoint). Experience in the Microsoft power suite (Power automate, Power BI) is preferred.

They will be results-driven, able to identify innovative and creative opportunities to drive an improvement in how the organisation makes the most of its software and other technological solutions.

Their attention to detail will be exemplary, with demonstrated competency in process development. They will be experienced in, and able to confidently and competently work with CRM tools.

It would be beneficial to have experience working in resource constrained environments (such as those presented by the not for profit sector) and project coordination experience.

Personal Attributes

- A team player who can effectively self-manage and integrate well with a team.
- Demonstrate a sensitivity, respect and understanding of the cultural and historical significance of the sanctuary.
- Customer service focused.
- Take personal responsibility and be accountable.
- Personal presentation to a high professional standard.
- Excellent administration, CRM and computer skills.
- Excellent verbal communication skills.
- Positive, can-do attitude, energetic and results driven.
- A forward thinker and multi-tasker.

Current: July 2024