

# Senior Manager, CRM Strategy and Operations

## Marketing Department

### Summary:

Responsible for the strategic direction, implementation, and management of the firm's CRM systems: Salesforce Sales Cloud, Salesforce Marketing Cloud Account Engagement (formerly Pardot), and Upper Sigma. The candidate must have a strong understanding of CRM best practices, experience aligning CRM initiatives with business development goals, and the ability to lead and mentor a team of CRM professionals.

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### Qualifications:

- Bachelor's degree in marketing, business administration, information technology, or a related field.
- Minimum of seven years of experience in CRM and marketing automation, with at least three years of experience in a leadership or management role.
- Demonstrated expertise in Salesforce administration, configuration, and customization. Salesforce Administrator or Developer certification is a plus.
- Proven track record of developing and implementing successful CRM strategies that align with business objectives and drive measurable results.
- Strong understanding of CRM best practices, data governance, and privacy regulations.
- Experience leading cross-functional teams and collaborating with stakeholders at all levels.
- Excellent project management skills, with the ability to prioritize and manage multiple initiatives simultaneously.
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### Duties and Responsibilities:

#### Strategic Leadership:

- Develop and execute a comprehensive CRM strategy that aligns with the firm's overall business development and marketing goals.
- Continuously assess and refine CRM processes, workflows, and technology to optimize efficiency, effectiveness, and user adoption.
- Stay abreast of industry trends and best practices in CRM and marketing automation, recommending and implementing innovative solutions to drive business value.
- Collaborate with firm leadership to define and measure CRM success metrics, ensuring alignment with key performance indicators (KPIs).
- Lead the development and execution of marketing automation campaigns, ensuring alignment with the firm's overall marketing strategy.

#### Team Leadership & Development:

- Provide leadership, mentorship, and guidance to the CRM team, fostering a collaborative and high-performing environment.
- Recruit, onboard, and train CRM team members, ensuring they have the necessary skills and knowledge to succeed in their roles.
- Encourage professional development and continuous learning opportunities for the CRM team.

#### Cross-Functional Collaboration:

- Collaborate with stakeholders across the firm (including attorneys, practice group leaders, business development professionals, and marketing colleagues) to gather requirements, prioritize initiatives, and ensure alignment with business needs.
- Act as a liaison between the CRM team and other departments (e.g., IT, Finance) to ensure seamless integration and data flow between systems.
- Partner with the Marketing team to develop and execute integrated marketing campaigns that leverage CRM data and insights.

#### Vendor & Technology Management:

- Manage relationships with key vendors and consultants to ensure optimal performance, value, and support for the firm's CRM investments.

## **Qualifications (Continued):**

- Strong analytical and problem-solving skills, with the ability to identify and address complex issues.
- Excellent communication and interpersonal skills, with the ability to build relationships and influence others.
- Experience in the legal or professional services industry is a plus.
- Experience with Upper Sigma (Litera) is a significant plus.

## **Work Location:**

- Washington, D.C.
- Core hours of 9:00 am – 5:30 pm, Monday-Friday; hybrid in-office, which will be a combination of onsite and remote work.

## **Duties and Responsibilities (Continued):**

- Evaluate and recommend new CRM technologies and solutions that can enhance the firm's capabilities and drive business growth.
- Oversee the implementation and integration of new CRM technologies, ensuring a smooth transition for end-users.

### **Operational Excellence:**

- Ensure the ongoing maintenance, security, and compliance of the firm's CRM systems.
- Monitor system performance, identify and resolve issues, and implement proactive measures to prevent future problems.
- Develop and maintain comprehensive documentation for CRM processes, workflows, and configurations.

### **Data Governance:**

- Establish and enforce data quality standards across the firm's CRM systems.
- Develop and implement data cleansing and enrichment strategies to ensure accurate and up-to-date information.
- Oversee data security and privacy measures to protect sensitive client information and comply with relevant regulations.

### **Other Responsibilities:**

- Other duties as assigned.

**Status:** Exempt

**Reports To:** Director of Digital Marketing

**Workplace Type:** Hybrid

**Salary Range:** \$148,600 - \$209,055

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