

## Job Description

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**Job Title: CRM and Engagement Coordinator (up to £35k dependent on experience)**

Department: Company Performance

Line Manager: Engagement & Partnerships Manager

Direct Reports: n/a

Location: On site, 80-81 St Martin's Lane, London WC2N 4AA

Hours: Full-time, 9:00am–5:30pm, Monday to Friday (some out-of-hours work required)

### Job Purpose

The CRM and Engagement Coordinator is responsible for maintaining high-quality member data, reporting and coordination to support effective engagement across HOLBA and the successful delivery of the BID ballot campaign.

Working as part of the Engagement team, the postholder ensures CRM data is accurate, up-to-date and structured to support voter tracking and engagement activity. The role provides reporting, briefing materials and data summaries to support targeted engagement and informed decision-making.

The postholder acts as a central coordination point for engagement activity, ensuring clear visibility of member interactions, accurate voter tracking, and alignment across the team.

The role also plays a key part in the operational delivery of the ballot campaign, supporting meeting scheduling, engagement planning and logistical organisation to ensure activity is delivered efficiently and consistently.

### Main Responsibilities

#### CRM and Data Management

- Maintain a compliant and up-to-date database of levy payers and voter contacts.
- Ensure high standards of data quality in the CRM (Vicinity), including accurate entry, labelling and tagging.
- Monitor and support CRM data entry across the team, identifying and correcting inconsistencies where required.
- Maintain clear, up-to-date visibility of engagement activity and voter status within the CRM.
- Maintain data structures that enable accurate reporting, segmentation and voter tracking.

#### Reporting and Insight

- Maintain a compliant and up-to-date database of levy payers and voter contacts.
- Produce regular reports, dashboards and data summaries to support engagement tracking and performance monitoring.
- Prepare briefing notes and background information to support member meetings and engagement activity.
- Support tracking of engagement coverage, identifying gaps and highlighting businesses requiring follow-up.
- Identify trends, gaps and potential risks in engagement data, escalating these to the Engagement team.
- Support the use of data to inform targeting and prioritisation of engagement activity.

### **Ballot Planning and Coordination**

- Support the delivery of the BID ballot campaign through effective coordination of activity and logistics.
- Coordinate engagement schedules and activity tracking to ensure consistent coverage across the BID area.
- Schedule member meetings, engagement visits and events, ensuring all relevant information and materials are prepared in advance.
- Assist in planning and delivery of engagement initiatives, including mailings, events and information sessions.
- Coordinate ballot-related logistics and ensure accurate tracking of activity and engagement.

### **Administrative and Team Support**

- Provide administrative and operational support to the Engagement team, including coordination of timelines and campaign activity.
- Support internal communication and information sharing to ensure alignment across teams.
- Assist with documentation, meeting preparation and follow-up actions where required.

### **Member Engagement Support**

- Act as a contact point for member businesses, responding to enquiries or directing them to appropriate colleagues.
- Maintain accurate CRM records of engagement activity to support tracking and reporting.
- Support communication with businesses and stakeholders as required.

### **Person Specification**

#### **Essential**

- Experience using CRM systems for data input, quality management and reporting.
- Strong organisational skills and attention to detail, with the ability to manage multiple priorities.
- Good written and verbal communication skills, with confidence engaging with internal and external stakeholders.
- Proficiency in CRM systems and Microsoft Office tools.
- A structured and methodical approach to data management and administration.

#### **Desirable**

- Experience using Vicinity CRM.
- Understanding of BID operations and ballot processes.
- Familiarity with businesses and the operating environment in London's West End.
- Experience supporting campaigns, stakeholder engagement or public-facing programmes.

Please note that the above is not intended to be an exclusive or exhaustive list of responsibilities and personal specifications but an outline of the main areas. Please also note that the Company reserves the right to update the job description at its discretion.