



**JOB DESCRIPTION**  
**CRM Operations Associate**  
**September 2019**

**Organizational Vision, Mission, and Function**

The Jewish Federation of Greater Washington envisions an open, connected, and vibrant Jewish community that cares for each other, fosters Jewish learning and journeys, embraces Jewish peoplehood and Israel, and acts as a force for good in the world. As a mission-driven non-profit organization, we work to inspire, build, and sustain vibrant Jewish life in a changing world by mobilizing our community in common purpose, intentional innovation, and effective action. Learn more at [shalomdc.org](http://shalomdc.org).

**Position Overview**

The CRM Operations Associate is responsible for learning and using our donor management system to its full capacity. In addition to performing donor relations services, the CRM Associate will also help us ensure effective, consistent use of our technology. This includes recommending internal systems for donation processing and acknowledgement. Daily tasks include speaking with donors directly, working with colleagues to develop a strategic plan for donor relations and managing the acknowledgement and payment reminder process for donors' gifts. Our CRM Operations Associate is a personable self-starter who understands the backend of a CRM and is able to successfully prioritize responsibilities in order to multi-task and thrive in a fast-paced environment.

**Primary Responsibilities**

- Learn all aspects of The Jewish Federation of Greater Washington's fundraising database and complementary systems
- Work as a team member in the strategic design and implementation of departmental and organizational goals
- Work closely with team members to develop strategies to ensure that donors are receiving excellent customer service
- Process commitments and payments to donor accounts
- Run basic queries and export results to assist with analysis and reporting
- Respond to inquiries and correspondence from donors and colleagues
- Process, export, merge and edit, as necessary, donor acknowledgements and reminders
- Assist with data hygiene and entry into donor database
- Run basic queries and export results from internal fundraising database systems according to specific criteria to assist with analysis, lists and reports
- Follow-up on all donor service-related questions and concerns via e-mail, phone or mail

**Requirements**

- Relevant backend CRM experience a MUST
- Bachelor's Degree (three years professional experience may be substituted for bachelor's degree)
- Excellent verbal and interpersonal skills
- Proven ability to work collaboratively and effectively with colleagues
- Proficiency in Microsoft Office Suite
- An appreciation for process and an ability to quickly grasp the resources, stakeholder information and decision points necessary for bringing a multifaceted task to completion
- Proven attention to detail in composing and proofing written materials
- Professional, service-minded attitude and demeanor
- Detail oriented, with strong multi-tasking, organizational, planning, follow-up and prioritization skills
- The ability to routinely handle sensitive/confidential information where the highest level of discretion is expected
- Ability and willingness to take direction, combined with ability to work independently

To apply for this exciting position, please send resume and cover letter to [jobs@shalomdc.org](mailto:jobs@shalomdc.org), using subject line "CRM OPS FY20".