

Role Description

CRM Insights and Engagement Specialist



Role Description Fields	Details
Department/Agency	State Library of NSW
Division/Branch/Unit	Experience and Engagement Division
Classification/Grade/Band	Clerk Grade 7/8
OSCA Code	271232
PCAT Code	326912
Date of Approval	04 September 2026
Agency Website	www.sl.nsw.gov.au

Agency overview

The State Library of New South Wales is one of Australia's oldest and most important public institutions. The Library preserves and presents the history of our State and our Nation for the benefit of all, offering essential services, extraordinary collections and magical experiences. Its rich collections, both physical and digital, alongside partnerships with the public library network across NSW and other vibrant collaborations enable Australians to examine their past and imagine their future. The State Library is the home of reading, research and creativity and a place where everyone is welcome.

The Library's Constituent Relationship Management (CRM) is an essential system to manage engagement with the Library's wide cohort of readers, visitors, and customers. The CRM Strategy is to increase constituent engagement, satisfaction, and operational efficiency by taking a whole-of Library approach to managing constituent information, relationships, and interactions. The CRM has been recently developed on Microsoft Dynamics 365 and is used by several Library branches and the Library Foundation.

The CRM Insights and Engagement Specialist sits within the Experience and Engagement Division and works closely with client-facing branches in the Experience and Engagement Division, the Learning Scholarship and Outreach Division, and the Library Foundation.

Library Values

The Library is guided by the values of Integrity, Curiosity, Community, Generosity, and Adaptability—principles that shape our organisation, guide our everyday behaviours and reflect our deep commitment to serving the community.

Primary purpose of the role

The CRM Insights and Engagement Specialist is responsible for transforming customer and stakeholder data into actionable insights that improve engagement, retention, acquisition, and overall customer experience outcomes.

The CRM Insights and Engagement Specialist leverages the Library's CRM to analyse engagement trends, develop audience intelligence, deliver reporting and dashboards, and identify opportunities to strengthen customer relationships and organisational performance.

The CRM Insights and Engagement Specialist serves as a bridge between the engagement and data teams, ensuring

that the CRM platform continues to evolve to meet operational needs, and that customer insights inform decision-making, campaign planning, and program design.

Key accountabilities

- Partner with stakeholders across the Experience and Engagement Division, Learning Scholarship and Outreach, and the Library Foundation, to maximise CRM value and benefits based on key engagement objectives.
- Identify opportunities to improve customer, staff and operational outcomes, and liaise with the CRM Platform Management team to ensure business needs are effectively translated into system enhancements and optimisation activities.
- Provide guidance to internal stakeholders on data capture, reporting, and CRM best practices.
- Develop audience segmentation models and customer journeys to support engagement strategies and analyse customer and campaign engagement data to identify trends, behaviours, opportunities, and risks.
- Deliver timely and accurate analysis to support operational and strategic decision-making, including regular engagement and performance reporting, to internal stakeholders.
- Working with the Platform Management team, contribute to the development of CRM support materials, guidance documents and training resources to promote consistent and effective use of CRM capabilities.
- Support onboarding staff into the CRM and related systems including collaborating on the development of training and support materials
- As a key member of the library-wide CRM Champions Group, identifying opportunities, making recommendations and actively participating in joint decision making related to the Library's CRM.

Key challenges

- Managing competing requests, priorities and stakeholder expectations.
- Translating engagement objectives into clear technical requirements.
- Balancing operational reporting and user support with strategic analysis

Key relationships

Internal

Who	Why
Branch Managers, EED and LSO Foundation team	• Understand business objectives, identify opportunities, and provide data analysis and recommendations.
Reader Services team	• Work collaboratively to identify opportunities to improve Library member and reader engagement through CRM functionality.
CRM Platform Manager	• Work collaboratively to identify and prioritise business improvement opportunities, translate business requirements into system solutions, support change implementation and ensure CRM capabilities are effectively utilised to achieve organisational objectives.
CRM Database and Systems Administrator	• Work collaboratively on daily CRM support activities, including business requests for data segmentation, list processing, data updates, extracts, reporting support and issue resolution.
CRM Champions	• Represent client-facing branches and promote adoption, identify improvement opportunities, support communication and validate changes before release.
Director, Experience and Engagement	• Regularly report to the Director on engagement analytics, identified opportunities and system improvement recommendations

Role dimensions

Decision making

- The role exercises independent judgement in analysing business problems, analysing data trends, developing recommendations and leading change and improvement activities. The role influences business and stakeholders in relation to priorities, requirements and implementation approaches.

Reporting line

This role reports to the Director, Experience and Engagement.

Direct reports

N/A

Budget/Expenditure

N/A

Key knowledge and experience

- Demonstrated knowledge of CRM platforms (Microsoft Dynamics preferred) and experience using reporting and visualisation tools (Power BI preferred)
- Demonstrated understanding of CRM principles, customer lifecycle management, customer journeys, segmentation, and engagement strategies with an ability to translate business objectives into CRM-enabled engagement activities.
- Experience engaging with a diverse range of business stakeholders on a CRM system to deliver ongoing value and benefits.
- Demonstrated experience delivering data analysis and reporting within a public engagement or cultural programming context, including the ability to identify trends, opportunities, and risks.

Essential requirements

- Relevant tertiary qualifications in marketing, communications, information technology or a related discipline, or equivalent demonstrated professional experience.

Capabilities for the role

The [NSW public sector capability framework](#) describes the capabilities (knowledge, skills and abilities) needed to perform a role. There are four main groups of capabilities: personal attributes, relationships, results and business enablers, with a fifth people management group of capabilities for roles with managerial responsibilities. These groups, combined with capabilities drawn from occupation-specific capability sets where relevant, work together to provide an understanding of the capabilities needed for the role.

The capabilities are separated into **focus capabilities** and **complementary capabilities**.

Focus capabilities

Focus capabilities are the capabilities considered the most important for effective performance of the role. These capabilities will be assessed at recruitment.

The focus capabilities for this role are shown below with a brief explanation of what each capability covers and the indicators describing the types of behaviours expected at each level.

Capability group/sets	Capability name	Behavioural indicators	Level
 Personal Attributes	Manage Self Be persistent, self-reflect and commit to learning	- Keep up to date with contemporary knowledge and practices - Seek and take advantage of opportunities to learn and apply new skills - Commit to achieving challenging goals - Seek and respond positively to constructive feedback and advice - Examine and reflect on your performance	Adept
 Relationships	Commit to Customer Service Provide customer-focused services in line with public sector and organisational objectives	- Take responsibility for delivering high-quality customer-focused services - Design processes and policies based on the customers' experience and engage people with lived experience to inform service improvements - Create opportunities to learn about and measure what is important to customers by engaging with a wide range of customer experience - Use customer data, feedback and insights to improve service delivery - Find opportunities to collaborate with internal and external stakeholders to improve outcomes for customers - Maintain relationships with key customers in your area of expertise - Connect and collaborate with relevant customers from the community	Adept
 Relationships	Work Collaboratively Collaborate with others and value their contribution	- Encourage a workplace culture that values collaboration - Communicate with other teams to improve information sharing - Share lessons learned with other teams and business units - Identify opportunities to collaborate with stakeholders, including people with lived experience, to develop better processes and solutions - Actively use digital information platforms, collaboration tools and other digital technologies to share information and work with diverse audiences to solve problems and improve services - Consider diverse cultural perspectives to provide insights into collaborative work	Adept
 Results	Deliver Results Achieve results by using resources efficiently and committing to quality outcomes	- Use your own and others' expertise to achieve outcomes, and take responsibility for delivering intended outcomes - Ensure staff understand expected goals and acknowledge staff success in achieving these	Adept

Capability group/sets	Capability name	Behavioural indicators	Level
		- Identify the resources people need and ensure goals are achieved within budget and on time - Use business data to evaluate outcomes and inform continuous improvement - Identify priorities that need to change and ensure the way resources are allocated meets new business needs - Ensure you budget for and clearly state the financial impacts of new priorities	
 Results	Plan and Prioritise Plan to achieve priority outcomes and respond flexibly to changing circumstances	- Understand the team and business unit's goals and set work tasks that contribute to meeting them - Set and develop team goals and plans, and use feedback to inform planning - Respond proactively to changing circumstances and adjust your plans when necessary - Consider how immediate and longer-term organisational issues might affect the achievement of your team and business unit goals - Adapt and respond proactively when priorities and work environments change	Intermediate
 Results	Think and Solve Problems Think, analyse and consider the broader context to develop practical solutions	- Understand a problem or explore an opportunity by finding data that is relevant, trustworthy and high quality - Research and analyse information to make recommendations based on relevant evidence - Identify and find appropriate solutions for issues that may stop people from completing their tasks - Be willing to seek others' input and share your ideas to achieve best outcomes - Come up with ideas and identify ways to improve systems and processes to meet organisational and customer needs	Intermediate

Complementary capabilities

Complementary capabilities are also identified from the Capability Framework and relevant occupation-specific capability sets. They are important to identify performance required for the role and development opportunities.

Note: capabilities listed as 'not essential' for this role are not relevant for recruitment purposes, however, may be relevant for future career development.

Capability group/sets	Capability name	Description	Level
 Personal Attributes	Display Resilience and Courage	Be open and honest, prepared to express your views, and willing to accept and commit to change	Intermediate
 Personal Attributes	Act with Integrity	Be ethical and professional, and uphold and promote the public sector values	Intermediate
 Personal Attributes	Value Diversity and Inclusion	Be inclusive and respect diverse backgrounds, experiences and perspectives	Intermediate
 Relationships	Communicate Effectively	Communicate clearly, pay attention to others and respond with understanding and respect	Adept
 Relationships	Influence and Negotiate	Gain consensus and commitment from others, and resolve issues and conflicts	Adept
 Results	Demonstrate Accountability	Be proactive and responsible for your actions, and follow legislation, policy and guidelines	Intermediate
 Business Enablers	Finance	Understand and apply financial processes to achieve value for money and minimise financial risk	Foundational

Capability group/sets	Capability name	Description	Level
 Business Enablers	Technology	Understand and use available technology to maximise efficiencies and effectiveness	Adept
 Business Enablers	Procurement and Contract Management	Understand and use procurement processes to ensure effective purchasing and contract performance	Foundational
 Business Enablers	Project Management	Understand and use effective ways to plan, coordinate and control projects	Intermediate