

Job Title: Product Manager - CRM

Department: Digital Delivery

Location: Mayfair

Salary Competitive salary plus a generous benefits package

Contractual Hours Full-Time Equivalent (37.5 hours per week)

Job Summary

The purpose of this role is to ensure the CRM evolves into a strategic, value-adding platform that supports the business end-to-end.

Their focus will be on usability, adoption, integration, and data quality, ensuring the CRM is a powerful enabler for advisers and the wider firm.

The postholder will own the vision, strategy, and roadmap for the CRM platform and subsequent workbench area, ensuring it delivers business value, supports advisers and client-facing teams, and acts as a reliable, compliant, and scalable system of record.

This will initially include migration to a new CRM system, working with stakeholders to define initial and ongoing scope of the new CRM system.

Key accountabilities

Product Strategy & Vision

- Deliver the CRM product vision and roadmap in alignment with the firm's growth, compliance, and client engagement strategies.
- Position the CRM as a strategic enabler (not just a database), focusing on efficiency, insights, and client experience.
- Balance configuration/customisation needs with platform sustainability and upgradeability. This includes ensuring that core data structures are simple and usable for the business, development and data teams.

Client & Business Insight

- Understand the needs of end users (advisers, support teams, compliance, marketing, operations).
 - Map workflows across teams to identify where the CRM can streamline, automate, or improve processes.
 - Stay close to vendor roadmaps and industry best practices to anticipate future needs.
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Delivery & Execution

- Translate business and user requirements into actionable epics, features, and user stories.
- Prioritise enhancements, integrations, and fixes based on business value, adoption impact, and technical feasibility.
- Collaborate with Delivery Managers, data, and developers to ensure successful delivery.
- Own data quality and usage KPIs to ensure CRM remains a trusted source of truth.
- Define and monitor success metrics (e.g. adviser adoption, time saved per task, error reduction).

Stakeholder & Change Leadership

- Act as the “product owner” of CRM in front of business stakeholders.
- Manage expectations across diverse groups with sometimes conflicting needs.
- Partner with Training teams to embed new processes and features into day-to-day operations.

Continuous Improvement

- Monitor CRM adoption and usage patterns; identify friction points and address them.
- Drive automation and integration opportunities (e.g. client portals, marketing automation, document management).
- Establish feedback loops with users to continuously refine the platform.

Competencies/skill set

- Getting things done
- Communication & Sharing Knowledge
- Customer Service
- Effectiveness & Adaptability
- Team Working
- Deep understanding of CRM principles (data model, workflows, reporting, automation, integration).
- Sees the CRM through the eyes of advisers, operations, compliance, and other stakeholders.
- Focused on data quality, reporting, and analytics as key enablers of business value.
- Able to work with architecture, data and developers on integrations, APIs, and configuration decisions.
- Balances competing needs across business functions; influences priorities effectively.
- Ensures users adopt and embed new CRM capabilities, not just release them.

Qualifications/experience required

Essential

- At least 2CRM product management experience
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- Experience in ongoing CRM management and CRM systems (Salesforce, Dynamics or both)
- Experience in CRM migrations or implementations including data mapping, system configuration and integrations with other core systems.
- Good understanding of data structures, workflows and integrations with the ability to translate business needs into requirements.
- Strong stakeholder management and communication skills.

Desirable

- At least 5 years CRM product management experience
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To apply, please email your CV and cover letter to recruitment@killik.com.

We are committed to ensuring a fair and inclusive process. If you require any reasonable adjustments under the Equality Act 2010 (for example, accessibility support or alternative formats), please let us know in advance so we can make the necessary arrangements. Your personal information will be handled in accordance with the UK GDPR and our [privacy policy](#).

Recruitment Process

At Killik & Co, we are committed to conducting a fair, consistent, and transparent recruitment process. While the structure may vary depending on the position, candidates can typically expect the following stages:

1. **CV Review** – All applications are anonymised, assessed against the essential and desirable criteria outlined in the role profile.
2. **First Interview** – An initial conversation designed to explore your professional background, core competencies, and motivation for the role.
3. **Second Interview** – A more detailed discussion with the hiring team, which may include technical questioning, competency-based evaluation, or discussion of relevant experience.
4. **Third Interview (where applicable)** – For certain roles, an additional stage may be required, such as a presentation, case study, or meeting with senior stakeholders.
5. **Offer or Decline** – Following completion of all interviews, we will communicate the final outcome. Successful candidates will receive a formal offer subject to any required pre-employment checks.

While we endeavour to respond to all applications, this may not be possible for vacancies with high volumes of applications.