

Role Profile

Role Details

Role Title	Marketing Data Planner
Pay band	5
Business unit	Retail
Reporting to	Data Planning Manager
Date produced or updated	May 2018

Purpose of Role

- To develop and deliver targeted data selections for use within marketing and communications campaigns, customer research and Financial Advisors.
- To deliver data selections that use robust targeting methodologies and support campaign evaluation.
- To ensure the use of customer data within NS&I and with our delivery partners is kept secure following Data Protection principles.
- To deliver the data for email marketing campaigns and to broadcast marketing emails, ensuring they are tested prior to broadcast. Also to provide high level analysis of our email campaigns.
- To support the Data Planning Manager in providing data for long-term campaign planning, issue resolution and to UAT new data sources and toolkits used within marketing

Key responsibilities

- Develop targeted data selections:
- To develop and run data selection queries using NS&I’s Campaign Management tools in a timely manner, ensuring accuracy of selections.
 - To guide key stakeholders across our marketing, research and intermediary teams on the best data selections to make for their particular activity and then to ensure these stakeholders are managed and kept up to date as the campaign extracts are developed.
 - To provide commentary and record all targeting methods employed to ensure NS&I has a record for audit, evaluation and potential complaint purposes.
- Use robust targeting methodologies:
- To deliver a robust campaign design by ensuring targeted audiences are sampled appropriately and campaign contention is managed effectively.
 - To apply insight into campaign targeting, including the delivery of propensity models. To improve future campaign data selections by using insight gained from past campaign evaluations.
 - To support robust testing (e.g. audience, copy, creative etc) within our marketing campaigns including setting control groups, A/B splits or MVT testing.
 - To run pre-campaign snapshots prior to the campaign delivering, so that the campaign can be evaluated effectively.
 - To execute external data processes to update our contact histories with final contact lists.
 - To guide the Business Insight team on the campaign design delivered, so that evaluation can be completed.

Keep NS&I's data secure:

- Have a good understanding of the Data Protection Act and the role it plays in the use of Data within Marketing.
- Ensure all data selections are suppressed appropriately using internal and external third party data.
- Deliver all data to outsource fulfilment agencies (e.g. mailing houses and email service providers) and internal stakeholders is done securely, and followed up to ensure they handle, store and use NS&I's data appropriately.

Deliver data for email campaigns

- Upload targeted data to our Email Service Provider, setting up the email campaign using their platform, including test cells, subject lines and uploading the HTML.
- Run appropriate tests on the data and email campaigns prior to broadcast, and then physically broadcast the emails
- Provide high level analysis of email campaigns back to the business post-send.

Support long term data planning, issue resolution and UAT of new data sources and tools

- Provide support to the Data Planning Manager to devise new audiences for future direct marketing and research activity, using NS&I's analysis and data mining tools (Business Objects and SPSS).
- Provide resource to investigate customer complaints that are the result of the use data within marketing campaigns in a timely manner, according to the service level agreements in place with the complaints team.
- Provide support to test new data sources and new campaign management tools as they are delivered to the business. This could include migrating data selection queries over to a new toolkit whilst also parallel running on the existing toolkit to ensure the marketing plan is delivered to timescale.

Relationships

Please list the jobs and areas with which the post interacts. This should show internal and external relationships.

Internal	External
<ul style="list-style-type: none">- Marketing & Communications Team- Wider Retail Team, in particular Market Research and Financial Intermediaries- Business Insight- Compliance	<ul style="list-style-type: none">- Atos Data Warehouse Team- Direct Mail Fulfilment- Email Service Providers- Data Cleansing/Suppression Bureaux- Creative Marketing Agencies- Campaign Management / Marketing Automation Software provider

Person specification

Essential qualifications, experience and technical knowledge

Essential qualifications

- Degree educated with a strong data, testing, numerical or statistical element to their degree – or equivalent experience.

Essential experience

- Strong numerical or data background with ability to demonstrate attention to detail
- Advanced knowledge of Excel
- Strong understanding of how relational databases work.
- Experience in handling and processing data and the importance of keeping it secure.
- Good planning and organisational skills with the ability to prioritise own work across multiple activities.

Essential technical knowledge and skills

- Up to date practical knowledge of data protection legislation and thorough understanding of how to keep data secure in transit.
- Solid experience of extracting, querying or manipulating large quantities of data using a data mining, analytical or campaign management tool. e.g. Chordiant Marketing Director, SAS, Business Objects, SPSS, Microsoft Access.
- The ability to articulate complex campaign selections to a marketing audience.

Desirable qualifications, experience and technical knowledge and skills

- Professional qualification in Direct & Digital Marketing (e.g. IDM Certificate in Direct & Digital Marketing, CIM etc)
- A desire to learn more about statistical hypothesis testing, campaign design methodology and constructing selection matrices for use within direct and digital marketing campaigns.
- Understanding of predictive data modelling techniques and their application within campaign management would be beneficial.

Competencies and values

Please read in conjunction with the NS&I Behavioural Based Competency Framework and give examples relevant to the role.

Customer Focus	Level (1-5)	2
<p>Level 2 – I will...</p> <ul style="list-style-type: none"> • Develop personal knowledge and understanding of my customers’ requirements, needs and interests • Seek feedback from my customers on their experience • Demonstrate awareness of and attention to the fair treatment of customers • Respond constructively in the scope of my role to feedback on the service provided to customers • Observe proper standards of market conduct 		

Communication	Level (1-5)	2
Level 2 – I will... <ul style="list-style-type: none"> • Build trust by seeking the views of others and listening with respect to their ideas • Use face-to-face open and cooperative communication to demonstrate a human touch, pace and confidence • Learn to communicate in a variety of situations and with a variety of people • Recognise the impact of my communication on others and customise the style and content as needed 		
Achievement orientation	Level (1-5)	2
Level 2 – I will... <ul style="list-style-type: none"> • Contribute to planning targets, milestones and deadline for the team • Focus diligently on what has to be done and avoid wasting resources on non-value adding activity • Review plans and progress with others in time to take corrective action where necessary • Manage time and other resources efficiently and effectively • Apply skills and care in the execution of allocated work 		
Managing third party relationships	Level (1-5)	2
Level 2 – I will... <ul style="list-style-type: none"> • Engage in positive, open and cooperative and constructive dialogue with third parties regarding their needs and interests • Develop personal knowledge and understanding of the needs and interests of third parties relevant to my role • Respond constructively and professionally to direct or indirect feedback from third parties 		
Improving business performance	Level (1-5)	2
Level 2 – I will... <ul style="list-style-type: none"> • Identify opportunities for improvement to processes, the observance of proper standards of market conduct and ways of working • Give constructive feedback to others • Demonstrate awareness of own strengths and development areas • Seek and respond positively to feedback from others 		
Leading others	Level (1-5)	2
Level 2 – I will... <ul style="list-style-type: none"> • Behave with honesty, integrity and responsibility in everything I do and say 		

- Agree work objectives and performance standards with others, including cost, quality and on-time delivery measures
- Support and challenge others to deliver against their personal and team work objectives
- Help people to see how their personal performance contributes to the company's success

Making decisions

**Level
(1-5)**

2

Level 2 – I will...

- Recognise new problems when they arise and identify when further investigation or assistance is necessary
- Break problems down to understand them more clearly
- Identify relevant information that is required to reach a decision
- Demonstrate integrity when weighing up alternative solutions systematically, including considering commercial factors
- Demonstrate confidence in own judgement and experience

Teamworking

**Level
(1-5)**

2

Level 2 – I will...

- Cooperate with other teams and departments across NS&I and our business partner in support of business need
- Help, support and coach other team members to achieve their goals
- Resolve, differences and conflicts within my own team constructively and assertively
- Learn new skills and try new ways of working for the benefit of the team