CRM Consultant Job Description

CRM Consultant | Professional Services | Reading, Berkshire (hybrid)

An end-to-end CRM consulting role with a UK CRM vendor. You deliver implementations from discovery through to go live, adoption, and handover, working directly on the platform you implement.

About Workbooks

Workbooks is a UK CRM vendor headquartered in Reading. We build, implement and support our own platform for mid-market organisations across sales and order management, marketing, customer service, and project management. Because we own the product and deliver the implementations, our consultants work closer to the platform, and to the customer outcome, than at most CRM consultancies.

Workbooks was rated the leading CRM for midsize businesses by TechRadarPro and has secured investment from BGF to accelerate growth. The Professional Services team is small and hands on, and is investing heavily in AI-assisted delivery.

The role

You deliver CRM implementations for mid-market customers, from discovery workshops through configuration, data migration, integration scoping, user acceptance testing, training, and go live. Engagements range from half-day improvements for existing customers to multi-week implementations.

This is a consulting role rather than a delivery-by-numbers one. You are expected to understand what the customer is trying to achieve, shape the configuration to match, and speak up when the approach they have asked for will not deliver the outcome they want. As you grow in the role, you take on more solution design and pre-sales work, with support from the senior consultants and the Professional Services Manager.

What you'll do

- **Discovery.** Run requirements workshops with customer stakeholders, turning business asks into structured, documented requirements.
- **Configuration.** Design and configure Workbooks CRM solutions across sales, marketing, service, and order management processes.
- **Delivery.** Deliver implementations covering planning, configuration, data migration, UAT support, training, and go live.
- **Customer success.** Run best practice and business review workshops with existing customers, producing roadmap recommendations.
- **Commercials.** Track budget burn on your engagements, flag overruns early, and raise change requests where scope moves.
- **Growth.** Spot expansion opportunities such as additional modules, integrations, or managed services, and hand them to the account team.
- **Team.** Contribute to team methodology, templates, and tooling, including our AI-assisted ways of working.

What we're looking for

- CRM implementation or administration experience, whether on Workbooks, Salesforce, Dynamics, HubSpot, or similar. CRM specifically, rather than general SaaS or consulting experience, is the key requirement.
- The confidence to run a workshop, stay credible with customer stakeholders, and ask the questions that get to what the business actually needs.
- The ability to step back from the immediate problem and consider the customer's business, not only the system.
- A structured approach to requirements, documentation, and delivery.
- Comfort with data migration, integration concepts, and reporting. Hands-on configuration experience is essential; SQL knowledge is a plus but not required.
- Curiosity about AI-assisted delivery and a willingness to adopt new tooling and ways of working.

Vendor or consultancy experience is preferred, but we would consider an in-house candidate who has owned a CRM implementation from the start. The team is a deliberate mix of personality types, what matters is productivity and a willingness to take ownership.

Working pattern and travel

Hybrid working from the Reading office at Suttons Business Park: three days a week in the office and two remote, currently Wednesdays and Fridays, with flexibility where people need to move days around. Customer site visits are occasional rather than regular, realistically around once a month, sometimes with an overnight stay where the location requires it. US projects are resourced from the UK and covered flexibly, with time back where an evening call is needed.