



Finance and CRM Manager



Finance and CRM Manager - Recruitment Pack

Job title	Finance and CRM Manager
Location	We offer a hybrid model of working. Our office is near London Bridge, which will be your location and contract base. You are expected to work two days per week in our London office
Salary	£40,000 per annum
Hours	Full time, 35 hours per week
Travel expenses	Staff are expected to pay their travel costs to and from their home to the London office, regardless of where they live. Staff are able to claim travel expenses for journeys to places other than the London office, for work purposes
Contract	Permanent
Annual leave	28 days per annum, including three mandatory days over the Christmas and New Year period, plus bank holidays
Reports to	Chief Executive

About us

At National Eczema Society (NES) we are passionate about making life better for people with eczema in the UK and their families. As a small and agile charity, we punch above our weight and have big ambitions.

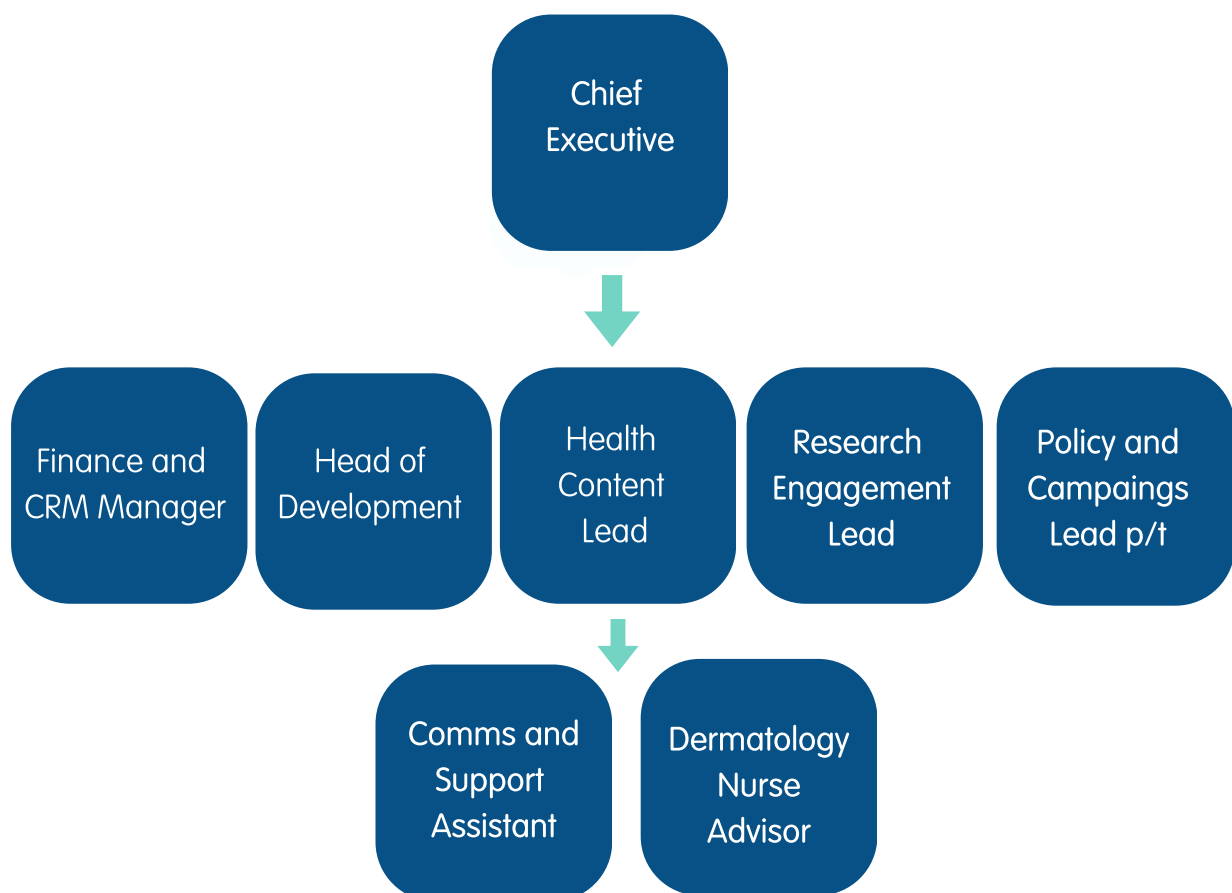
In the UK, around 1 in 5 children and 1 in 10 adults live with eczema, so lots of people are looking to our charity for support and hope. Our mission is to empower people to live well with eczema and bring about positive change for our eczema community.

We do this by providing expert information and advice needed to manage eczema well. We also create a healthier future by raising awareness and understanding of eczema, campaigning to improve medical care, and supporting research into new treatments, prevention and ultimately a cure.

We rely on voluntary donations, legacies, membership fees and corporate sponsorship to fund our vital work. Managing the charity's finance operations well is vital to our organisational effectiveness and our Finance & CRM Manager is a core member of the team. The postholder manages the day-to-day running of the Society's finance and CRM (customer relationship) operations, including our membership scheme. National Eczema Society is a membership charity and we have around 2,000 members.

You would join our small team based at the charity's offices near London Bridge. There is flexibility for some home-based working and you are expected to work in the office at least two days a week to facilitate effective team-working. National Eczema Society offers help for staff studying for accounting exams.

Our team structure



Job description

We are looking for a very capable Finance & CRM Manager to join us. This is a varied and rewarding finance role at the heart of a small, friendly and ambitious team working to improve the lives of people with eczema. To be successful, you will need to be proactive and enjoy working in a small organisation. The role involves a high degree of delegated responsibility and autonomy, and the Finance & CRM Manager is expected to manage their workload effectively within their functional remit.

The postholder manages the day-to-day running of the Society's finance and CRM operations, including the National Eczema Society membership scheme. This is a full-time sole-charge role, managing the processing side of charity's finance function, including managing purchase and sales ledgers, preparing payment runs, managing supplier reconciliations and month-end tasks.

Job purpose

The post-holder is responsible for and manages the day-to-day running of the Society's finance and CRM operations, including the National Eczema Society membership scheme.

Key responsibilities

- Manage the day-to-day finance operations
- Manage memberships and payments
- Organisational lead for ThankQ supporter database
- Lead on finance functionality for the NES website
- Support for office admin operations.

Job description

Manage day-to-day finance operations

- Record all transactions on Xero
- Prepare a monthly payment run, ensuring supplier statements are reconciled and suppliers are paid on time, as well as resolving any queries that may arise
- Prepare monthly salary payments and ensure these are paid on time
- Set-up new direct debit instructions and manage cancelled and failed direct debits

- Manage and process donations received via direct debit and standing order
- Set-up new suppliers on Xero and as a bank payee, and record relevant contracting information on Xero
- Process purchase ledger invoices, make payments, and send remittances
- Process sales invoices and reconcile monies received, and undertake debtor management as needed
- Import donation records from various fundraising and payroll giving payment platforms and providers,
- Ensure all incoming donations receipts are recorded on ThankQ and where needed followed up with a timely letter/email of acknowledgement. This includes donations received by cheque, credit/debit card and via third-party payment platforms
- Undertake monthly bank reconciliations, and reconcile bank and CRM records
- Prepare periodic cashflow forecasts and analysis
- Prepare and submit quarterly Gift Aid claims
- Prepare and submit quarterly VAT returns
- Prepare monthly journals
- First point of contact for payment providers including Stripe, GoCardless and PayPal
- Authorised user on Society bank accounts
- Contribute to quarterly management accounts and annual accounts as needed
- Process staff, Trustee, and volunteer expense claims
- Liaise with the Society's Honorary Treasurer and Chair as needed
- Review, post, and reconcile all credit card transactions.

Manage NES membership and supporter records

- Responsible for and manages the NES membership scheme, including liaising with members and resolving any queries that may arise
- Process new memberships and related payments, record member information on ThankQ and send out welcome packs and payment acknowledgements
- Set-up and manage new regular donors, sending welcome letters
- Be a main point of contact for members and supporters, and update contact records on ThankQ, such as changes of address and Gift Aid status
- Generate and mail annual membership renewal letters/forms when they fall due
- Generate membership mailing data for Exchange magazine.

Organisational lead for CRM/ThankQ supporter database

- Leads on ensuring ThankQ databased is used effectively for recording supporter data
- Build reports, configure destination coding, and other database settings, as well as create and update letter templates, when needed
- Supports other team members on effective use of ThankQ software
- Main point of contact for ThankQ software provider, the Access Group.
- Manage the main email inbox and coordinate responses or referrals internally.
- Be a point of contact for general office queries.

Lead on finance functionality for the NES website

- Liaise with website support provider to ensure donation functionality on NES website is operating effectively
- Troubleshoot issues with online donation functionality, ensuring it is working at all times
- Lead on website security, liaising with third-party payment platform and website providers as needed
- Support NES supporters in making online payments.

Support for office admin operations

- Support and in some cases take lead on office operations including being a main point of contact for phone enquiries and managing post.

General management

- Support the Chief Executive in annual budgeting and planning, including leading on own areas of responsibility
- Contribute to periodic strategy development scoping and planning
- Maintain key indicators reporting for own areas of responsibility
- Work with Chief Executive and other function leads to support proactive and reactive eczema awareness campaigns. The main activity is National Eczema Week in September.

Additional responsibilities for all National Eczema Society staff

- Adhere to Society policies and procedures.
- Comply with data protection regulations ensuring that personal information remains confidential.
- With your manager's support, be responsible for own personal learning and development and to support the learning and development of others and the whole organisation. National Eczema Society offers help for staff studying for accounting exams.
- Organise your work to ensure that it is accurate and meets quality targets and reasonable deadlines.
- Undertake any other tasks, duties or projects that may arise from time to time.
- This job description is not exhaustive and serves only to highlight the main requirements of the post holder. The Chief Executive may stipulate other reasonable requirements.

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Person specification

All of the following are required unless marked as desirable. Requirements are assessed using information provided on the application form, and from interviews, skills assignments and references.

Qualification and knowledge	Application	Interview
Trainee accountant or qualified by experience	X	X
Competent written and spoken English language	X	X

Experience	Application	Interview
Experience of undertaking and managing core finance functions as set out in the job description	X	X
Previous sole-charge finance role experience desirable, but not essential	X	
Previous experience working for a charity and/or membership organisation preferred	X	
Experience of Xero, CRM systems (e.g. ThankQ), Microsoft Office applications (Excel, Word, Outlook), and email clients (e.g. Mailchimp) an advantage	X	X

Skills and abilities	Application	Interview
Good verbal and written English language communication skills, able to write clear and effective letters and emails to the charity's members, donors and suppliers	X	X
Able to produce consistently accurate work with strong attention to detail	X	X
Systematic, able to prioritise and highly organised workstyle	X	X
Able to plan and deliver to deadlines	X	X
Good interpersonal skills, able to build relationships at all levels with National Eczema Society supporters, staff and external stakeholders		X

Values, attitudes and behaviours	Application	Interview
Able to show empathy and to understand the challenges faced by people affected by eczema	X	X
Able to manage and prioritise own workload, and to work effectively with minimal supervision	X	X
Willingness and ability to learn, and to adapt to changing situations and evolving workload	X	X
Self-motivated and proactive, able to work effectively in a home setting as well as an office	X	X

Able to work collaboratively with others and in a small team	X	X
Confident using appropriate initiative and judgement, and taking decisions independently within remit		X
Willingness and ability to learn and adapt quickly to changing situations and evolving workload	X	X
Commitment to the vision and aims of the Society, including commitment to equality and diversity	X	
Able and happy to travel independently and to work occasional evenings and weekends, as well as occasional overnight stays away from home		X

National Eczema Society is committed to achieving greater equality, diversity and inclusion, to better reflect the diverse communities we serve who are affected by eczema.

Through our policies and actions, National Eczema Society is focused on being an inclusive and diverse organisation. Our objective is to integrate the principles of equality and diversity into all aspects of the charity's day-to-day work and strategic planning.

How to apply

If this role sounds like it's right for you and you'd like to apply, please send us:

- A CV outlining your employment history, academic and professional accounting qualifications.
- A supporting statement (no more than two A4 pages please), explaining how you meet the requirements described in the job description and why you're interested in this role at National Eczema Society.

Please email your CV and supporting statement to info@eczema.org, by Monday 20 October 2026 (by 5pm)

Please reach out to Andrew Proctor, Chief Executive, if you'd like an informal and confidential conversation about this position, via the above email address.

No agencies please/Direct applicants only.

Next steps

Please let us know if you require any special provision if you're called for interview, or if you have any anticipated difficulties with the dates.

Closing date: Monday 20 October 2026 (by 5pm)

In-person interviews in London: W/C Monday 3 November 2026

National Eczema Society

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Email: info@eczema.org | www.eczema.org

National Eczema Society is a registered charity in England and Wales (Charity Commission no. 1009671), and a company limited by guarantee (no. 2685083).