



Candidate pack

Role: Director of Customer Marketing
and Retention



British Heart
Foundation



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Appointment of Director of Customer Marketing and Retention

Dear Candidate,

Thank you for your interest in our role of Director of Customer Marketing and Retention at British Heart Foundation (BHF).

It is my privilege to lead the Marketing, Fundraising and Engagement team for one of the UK's largest charities and the nation's leading independent funder of heart and circulatory disease research.

British Heart Foundation is strong, highly effective and well respected nationally and internationally. Every day we turn to research for hope, which is funded solely by the generosity of our supporters. At BHF, we know the only way to get closer to a world free from the fear of heart and circulatory diseases is to invest in pioneering research that has the greatest potential to improve and save lives.

As a Director of Customer Marketing and Retention, you'll lead, develop and deliver the marketing strategy and communications targeted at our existing customer base.

We want an exceptional colleague who exemplifies and champions our values; brave, informed, compassionate and driven. It's an incredibly exciting time to be part of our team. We are more ambitious and determined than ever – because the potential cures and treatments we need are in sight. You could be part of getting us there sooner, so thank you for your interest.


BHF is also proud that we are working towards being a truly diverse organisation, with an Equality, Diversity and Inclusion (EDI) strategy, Igniting Change, which sets out a roadmap of the changes we want to see by 2025. Our growing commitment to equality and diversity spans across our organisation and we pride ourselves in being an inclusive employer who puts diversity at the heart of everything that we do.

So, if you feel you have the skills and experience that we are looking for, and you share our determination to help fund lifesaving research, then we would be delighted to hear from you.

Claire Sadler

Chief Marketing and Fundraising Officer





“CPR and heart surgery saved my life when I was six. Research made that happen.” - Jady Briggs

About British Heart Foundation

For more than 60 years, British Heart Foundation has been at the forefront of cutting-edge research that has saved and improved millions of lives. But, despite this progress, our work is needed more than ever today. Over 7 million people are living with heart and circulatory diseases in the UK - that's our parents, grandparents, children and siblings. Heart and circulatory conditions remain the biggest killers globally.

We raise money to fund research that helps to save and improve lives, and to support people affected by heart and circulatory diseases. These diseases can affect anyone.

For over 60 years we've been a leading independent funder of research into heart and circulatory diseases. We are the UK's largest charity retailer with around 700 stores, an employee base of over 4,000, supported by a further 18,000 volunteers.

Our lifesaving work is primarily advanced through long-term investment in medical research. We have £437 million of BHF-funded research underway, with an aspiration to invest in excess of £1 billion in research over the next ten years.

We have so much to be proud of. But we know we're just scratching the surface of our true potential. And the challenges we face are as grave as ever.

There is nothing more precious than our hearts. But the tragic reality is that millions of people's hearts are at risk. Mounting numbers of people face an agonising wait for care, while many more live in hope of treatments and cures that could save or improve their lives.

At the same time, we stand at the precipice of revolutionary scientific advances. From unleashing the power of artificial intelligence (AI) and Data Science which could stop heart attacks and strokes, to finding revolutionary gene editing cures to end sudden cardiac death.

We need more support. By joining British Heart Foundation, you could help us bring hope to people living with heart and circulatory diseases in the UK.



Being a responsible charity

We've become a more socially, environmentally and financially sustainable organisation.

Our core purpose is to save and improve the lives of people affected by heart and circulatory diseases. We raise money to fund research to find cures and develop treatments for the world's biggest killers. And we are determined to do this in a responsible way.

Climate change, environmental sustainability and social inequality are some of the critical challenges of our time and are clearly highlighted in the UN's Sustainable Development Goals. Our own health is dependent on the planet we inhabit, and the way societies are structured, which are often unfair and unequal on its people. We recognise our responsibility and the important role we play in tackling these issues.

Our strategy to 2030 highlights our commitment to being a healthy and inclusive place to work and a leading force for good in society. We are proud of our progress in the area. Our retail activities contribute significantly to the UK's economy and communities. Our EDI 'Igniting Change' strategy demonstrates

our commitment to improving equality, diversity and inclusion in all areas of our work, and we have programmes underway to reduce the environmental impact in many areas – from our transport to our supply chains. But we want and need to do more.

In response to soaring energy costs, we formed an Energy Efficiency Task Force and launched an energy awareness campaign, You Have the Power, to share energy saving information with BHF colleagues and volunteers.

Overall we were able to reduce our consumption by 10% over 2022-23. We will continue to explore energy efficiency improvements and to give our staff and volunteers more power to reduce energy consumption while providing a safe and comfortable working environment.

Funding animal research is not a decision we take lightly. You can read more relating to our commitments in research [here](#).

Our strategy to 2030

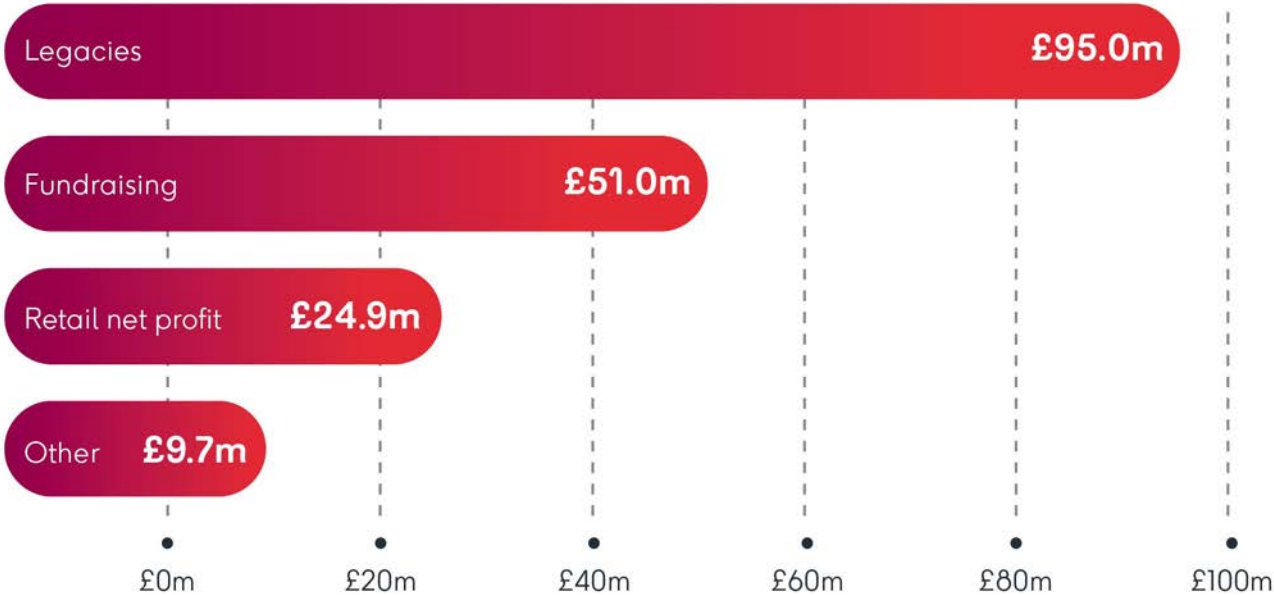
Inspiring support, accelerating breakthroughs, saving lives.

BHF has never been more needed. But we're poised and ready to meet this moment.

Our strategy is a commitment to helping achieve this vision, and sets out the objectives and activities we will prioritise in the years ahead.

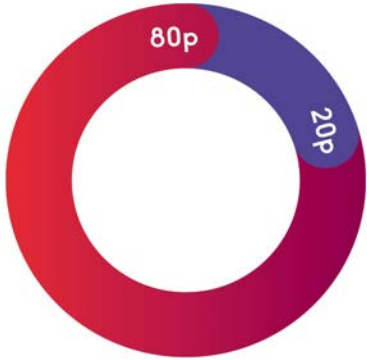


Where our money came from in 2022-23



How your money was spent in 2022-23

Investment in growing our income was £36.3m meaning 80% of total income (net of retail costs) was available to beat heart and circulatory diseases. This is well above our target range of ensuring that at least 70p in the £1 is available to spend on our lifesaving work.



How we delivered our mission in 2022-23



*£115.6m of research grant awards, less accounting adjustments.

Funding world leading science

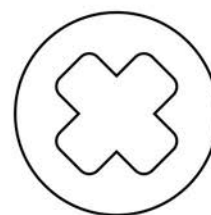
British Heart Foundation is the biggest funder of noncommercial research into heart and circulatory diseases carried out in the UK, with £437m of BHF-funded research underway.

£437m



£116m

Grants awarded



720

Active research grants



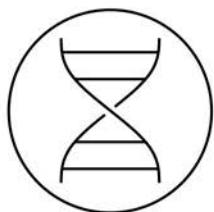
464

Principal Investigators



248

Students currently supported



1,100

Research staff



48

Research institutions across UK

Connecting the dots in research

Research requires connections – and bold initiatives. We committed £116m of new funding to research in 2022/23, including a once-in-a-generation £30m research grant to CureHeart. This global team of pioneering researchers seeks the world's first cures for inherited heart muscle diseases. This demonstrates how much can be achieved when brilliant people come together.

Our commitment to funding lifesaving research has grown thanks to significant income recovery from retail, fundraising and legacies

But BHF has never been more needed. We're poised and ready to meet this moment. As a BHF team, we have everything we need united behind a shared vision. We will continue to fund world-class research to save and improve lives.

We will focus on:

- **Helping the cardiovascular research ecosystem recover and grow.**
- **Progressing our ambitions around equality, diversity and inclusion in cardiovascular research.**
- **Enhancing knowledge of cardiovascular diseases.**
- **Implementing partnership initiatives to address unmet need e.g. with the UK Dementia Research Institute, Medical Research Council (MRC) and Innovate UK.**
- **Seeing more BHF-funded research discoveries being translated into patient and public benefit.**
- **Developing a research translation strategy, to increase the commercial exposure and translation of BHF-funded research towards patient benefit.**

We want
more people to
survive a heart
attack

5

Every five minutes someone
is admitted to a UK hospital
due to a heart attack



Heart health matters

More than seven million people live with heart and circulatory diseases in the UK today. Millions more have risk factors for these conditions, such as high blood pressure, raised cholesterol, and type 2 diabetes. Given the immense scale of this public health challenge, what can we do to ensure that everyone has access to the personalised, optimised, prioritised care they need?

Our analysis into the impact of the pandemic shows that the cardiovascular workforce is one of the most important factors affecting patient care and something heart patients want to see addressed.

Our continued focus to promote information and provide support to heart and circulatory disease patients will be accelerated by:

- Increasing people's chances of surviving out-of-hospital cardiac arrest (OHCA).
- Scaling RevivR (our accessible, digital CPR training product) to engage with different audiences.
- Helping more people to manage their cardiovascular condition.
- Ensure BHF is meeting patient requirements at key points of need with our information and support offer.
- Supporting people to reduce their risk of cardiovascular disease.
- Targeting policy development and influencing, particularly in relation to hypertension, obesity and the NHS workforce.

We want

everyone to know
their numbers

5

As many as 5 million people
are living with undiagnosed
high blood pressure in the UK



Our mighty network of support

Our amazing fundraisers, shoppers and supporters are the beating heart of everything we do. Their passion, determination, and belief in our mission make lifesaving breakthroughs possible. And even during the toughest times, faced with a myriad of economic challenges, our supporters continue to run, swim, cycle, shop and rally together for people affected by heart and circulatory diseases.

Thanks to the phenomenal efforts of our staff, volunteers, partners and our supporters, we generated an incredible £144m net income over 2022-23 to power our lifesaving work. Our razor-sharp focus to work in partnership and accelerate fundraising in a bid to save even more lives has never been more crucial.

We will continue to focus our attention on raising awareness of our mission and raising funds to power our lifesaving science by:

- **Generating more fundraising income, with an increased proportion from high value audiences.**
- **Focussing on integrated moments to drive income and greater consideration to donate.**
- **Generating more income from our commercial operations, with an increased proportion from online retail.**
- **Continue our new shop and store opening programme.**
- **Ensuring our supporters have an outstanding experience.**
- **Improving our understanding of supporters and personalising our offer through smarter marketing technology.**

We want

to tackle vascular dementia

13,000

Vascular dementia causes more than 13,000 deaths each year in the UK. People with a family history of coronary heart disease are significantly more likely to develop vascular dementia

United together in our mission

We want BHF to be a safe, healthy, and inclusive workplace.

Our EDI strategy, Igniting Change, is a commitment to embed equality, diversity and inclusion into everything we do. We want to create an environment where everyone who works with us can succeed, regardless of their background. One of the ways we do this is by developing an open and inclusive culture.

We are clear about our direction and what we need to achieve. We are Team BHF, we have a shared goal, supported by streamlined processes, a culture of continuous improvement and living our BHF values through everything we do. We're stronger working together.

We can inspire support, accelerate breakthroughs and save lives, when we work together. Team BHF is united in our shared vision and we'll continue to focus on these key areas that will help drive our performance forward by:

- **Delivering an outstanding people experience.**
- **Planning strategically for the skills, capabilities and talent BHF needs to thrive in the future.**
- **Accelerating our digital and technology transformation.**
- **Embedding solid technology foundations, delivering greater interconnectivity between teams, increased pace and improved customer engagement and satisfaction.**
- **Continuing to increase our social, environmental, and financial sustainability.**



We want
every child born with a heart condition to lead a long and healthy life

13

Every day, around 13 babies are diagnosed with a heart condition in the UK

The infographic features a large red circle containing the number '13'. Above the number is a smaller red circle with a white icon of a family (two adults and a child). To the left of the number is a red circle containing the text 'We want every child born with a heart condition to lead a long and healthy life'. Below the number is the text 'Every day, around 13 babies are diagnosed with a heart condition in the UK'.



Team BHF attending Birmingham Pride 2023

Equality, diversity & inclusion

Our push for equality, diversity and inclusion takes many forms, including how we manage our organisation, and how our research funding helps to tackle health inequalities.

Reducing heart and circulatory disease health inequalities is an important part of our strategy to 2030. The ongoing work of Kaleidoscope, our equality, diversity and inclusion group, as well as our Research Inequalities Working Group, demonstrate our commitments to improve equality, diversity and inclusion for our staff, our volunteers, and our funding activities. We want all of our BHF colleagues to have development and progression opportunities, and to embed a more inclusive culture throughout our organisation. Our EDI strategy, Igniting Change, sets out our roadmap of the changes we want to see by 2025.

Our Kaleidoscope group is made up of representatives from across the organisation. Our activities encompass accessibility to work and progression for those with care responsibilities, working parents, those with disabilities and long term health conditions, different age groups, those from underrepresented ethnic backgrounds, LGBTQ+ individuals and many more forms of diversity, visible and invisible.

We have a number of affinity groups within the organisation. These include spaces for working parents, individuals from different religious, racial, and ethnic backgrounds, members of the LGBTQ+ community and those with disabilities and long term health conditions. These are designed to be spaces for colleagues to feel connected, included and heard.

Whilst working for BHF, we actively encourage our colleagues to feel safe to bring their true selves to work. We strive to create a culture where colleagues are inquisitive about diversity and keen to get involved in all activities which make individuality and inclusivity part of what we do every single day

We want to fund lifesaving research for everyone. We can help to achieve this by welcoming colleagues from all backgrounds to come and be part of our BHF family.

Building an inclusive and supportive environment

Many heart and circulatory diseases are diseases of inequality. We are committed to funding lifesaving science for everyone, and we are committed to being an inclusive employer.

At BHF we want to ensure our workforce reflects the general population of the United Kingdom, so we can better represent the experiences and voices of the communities we support. A more diverse, inclusive, and fair BHF will not only improve the quality of what we do, but the impact we have.

Staff engagement

Listening to our colleagues, and understanding what matters, is always the first step in improving the employee experience.

Our wide-ranging employee survey received record support (69%), and attracted 19,000 comments and views. Our engagement score, one of the most important measures we track, was maintained at 7.5 out of 10.

Heartfest

In June 2022 we held our first Heartfest, an online festival that brought BHF colleagues together to celebrate our work and give everyone a chance to reconnect with each other and to our cause. The various interactive sessions featured colleagues, patients, researchers and supporters sharing inspiring stories, with music and wellbeing sessions adding to the festival feel.

Heartfest returned in 2023, bigger and better, and incorporated both online and in person events at BHF offices and shops across the UK.



Becky's story

Becky Newham, Senior Manager, Planning and Performance: "I'm 38 and have been living with sight loss since the age of 8. I've worked with various individuals across the organisation to raise awareness of some of the challenges I face and improve some of our ways of working. For me to be fully included it requires support from everyone on an ongoing basis."

Celebrating Pride

Pride is a chance for us to learn and show support for the LGBTQ+ community. BHF colleagues took part in Pride events across the country, including Edinburgh, Birmingham and London Pride events.

These are our values

We are proud that the work we do is funding groundbreaking, lifesaving research that one day could see a world free from the fear of heart and circulatory diseases, including conditions such as heart attacks, stroke and vascular dementia.

That's why our values are key to defining who we are, how we do things and how we can achieve our ambitions so that every pound we raise funds the science that keeps millions of hearts beating.



We're brave

We speak out. We're decisive. We're innovative.



We're compassionate

We're open and honest. We respect others. We care.



We're informed

We're clear. We're open minded. We're work together.



We're driven

We're focused. We're determined. We keep learning.



Our benefits

We all achieve more together when we're happy and healthy

As a world class organisation, we offer competitive salaries and an attractive package of benefits, designed to support the health and wellbeing of everyone who works here.

Our generous benefits include:



Annual leave

Our annual leave allowance of 30 days plus bank holidays is among the best in the sector.



Healthcare

We offer employees private healthcare, dental health cover and a contribution towards your gym membership.



Family leave

We offer 12-weeks' pay package for all family leave including maternity, paternity and adoption leave and are committed to offering returning parents and guardians the opportunity to work flexibly.



Live well. Work well.

Heart health is central to our mission, and that starts with you. We provide a programme of activities, opportunities and guidance to inspire and support you to live a healthy and happy life, at home and at work.



Support leave

We offer a holistic support leave of up to 10 days leave to support colleagues in time of uncertainty, where you may need to take additional time away from work to support yourself or others during a life event, such as caring responsibilities, bereavement, and specialised medical appointments.



Pension

Our generous pension scheme will support you to save for your retirement. You can contribute a minimum of 3% but can increase this to 8% or more, with employer contribution starting at 5% and increasing to a maximum of 10%.



Job specification

Job description

Job title	Director of Customer Marketing and Retention		
Directorate	Marketing, Fundraising and Engagement (MFE)		
Team	Customer Marketing and Retention		
Reporting to	Chief Marketing & Fundraising Officer	No. of direct reports	6
Agility contract type	Blended (home and office)		
Location	Dual Location – London Office (NW1 7AW) and Home		
Budgetary responsibility	Income/revenue c.£18m, and expenditure c.£2m		
Job level	2	Date	Aug 24

Role summary

To lead, develop and deliver the marketing strategy and communications targeted at our existing customer base. With the objective of engaging and developing our customers, the role will deliver and grow our mass fundraising income through upsell, cross-sell and improved retention.



Key responsibilities

Strategy and Leadership

- Lead the Marketing Planning and Strategy team to provide a market insight, an integrated annual (and quarterly) BHF marketing plan and ensure accurate marketing performance insight, enabling data-driven decisions.
- Lead the Customer Insight team to develop a deep understanding of our customer base and undertake ad hoc customer research to inform marketing activity.
- Lead, develop and deliver the mass fundraising customer marketing strategy to achieve short and long-term income targets and build brand consideration - maximising the overall value of our customer base.
- Input into the development of product portfolio roadmaps for mass fundraising and legacy products, responding to market and external factors – working with Director of Innovation, Product Development and Delivery.
- Lead and deliver data and insight led marcomms improving the quality and effectiveness of our customer journeys, with the vision of automated, data driven, personalised customer journeys. Improving supporter metrics such as marketable universe, supporter engagement and improved CLTV.
- Develop and build a best in class, diverse, high performing team, and agency infrastructure.
- Delivery fundraising compliance strategy and principles (e.g. fundraising compliance, data compliance etc).



Key responsibilities

Execution

- Delivery of the Inspiring Action Marketing Strategy objectives (income, brand, health and customer KPIs).
- Accountable for directly delivering multi-million-pound income targets and maximising ROI (and marcomms metrics regarding response rates, conversion rates) across a portfolio of income-generating individual giving, legacy CRM, and patient health marcomms.
- Lead the marketing communications execution to retain existing customers/ donors and grow the customer lifetime value of our customers & customer base through multiple product holdings (upsell & cross-sell). Customer journey delivery of automated, data driven personalised, cross-channel customer journeys and continuous improvement of performance.
- Support the delivery of brand and health marketing campaigns to deliver brand and/or health marketing objectives through integrated campaigns working with the Director of Brand & Acquisition & team.
- Play a critical role as part of the MFE leadership team in driving the successful achievement of non-financial KPIs across our mission and money portfolio.
- Accountable for media spend and media effectiveness in line with Fundraising and Engagement targets.
- Audience segmentation and operationalising segmentation within our customer data platform to inform and develop audience-centric customer journeys.
- Set targets and achieve growing our marketable universe.
- Improve operational efficiency, reduce cost and increase ROI of marketing communications.
- Develop a high performing team, with the right skills and capability and clear succession plans.

Key Outputs:

- Delivery of KPIs and financial targets.
 - BHF wide annual & quarterly marketing plan of activity.
 - Customer retention strategy and plan to drive income growth.
 - Agency management including regular reviews and performance related bonuses.
 - Marketing effectiveness framework – with econometrics to measure below the line effectiveness and contribution, alongside other measurement methodologies (multi-variant, A/B testing, churn reduction).
 - Email, direct mail and content production.
 - Customer journey plans & data briefs.
 - Marketing skills training programme for Customer marketing and Retention team.
 - Annual and quarterly customer marketing & retention plans.
-



Person specification

Knowledge, training and qualifications

- Rounded marketing experience (across the 4 Ps – product, price, place, promotion) and the marketing process from strategy and planning to execution.
- Deep and demonstrable understanding of customer data, insight, CRM and to how to influence customer behaviour.
- Knowledge of fundraising and commercial approaches to driving income and maximising value from existing customer base.
- Knowledge of the UK health charity sector (desirable, but not essential).
- Strong understanding and application of data and segmentation to drive business performance.

Experience

- Senior leadership experience in a complex organisation – operating and influencing at Board Level and leading large teams.
- Extensive fundraising or commercial experience of delivering financial targets.
- Senior level experience in marcomms execution, and demonstrable ability to develop customer marketing strategy and lead successful marcomms campaigns.
- Experience of delivering transformation in marketing outcomes and income impact.
- Extensive agency management - to build a high performing partnership, delivering award winning below the line work.
- Success in developing a high performing team and improving the skills and capability of the team (from brief writing through to creative development and measurement/effectiveness).
- Experience in subscription or customer contract-based businesses to drive renewal, reduce churn and in-life upsell.

Skills and attributes

- Excellent communication and influencing skills.
- Strong stakeholder management, collaboration and relationship building skills.
- Strategic analytical skills, with the ability to logically frame problems and solutions.
- Confident leading through change and ambiguity and bringing about effective change.
- Evidence of ability to meet tight and challenging deadlines, managing complex and multiple pieces of work.
- Happy to 'roll-sleeves up' to help the team learn and develop (when needed).

Safeguarding

At British Heart Foundation (BHF), we are committed to creating a safe and rewarding environment for all of our people to work and volunteer. This means we have a robust safeguarding policy to ensure everyone is treated properly, and a whistle blowing service so people can raise any concerns they have confidentially.



How to apply

To make an application, please go to <https://starfishsearch.com/jobs/bhf-cmr/> and click on the apply now button.

Our process involves submitting your CV and a supporting statement, which should outline your interest and explain how you meet the criteria stated in the person specification.



**British Heart
Foundation**