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| **JOB TITLE:** | Salesforce Administrator | |
| **DEPARTMENT:** | Digital Delivery and Data | |
| **JOB HOLDER:** | N/A | |
| **REPORTS TO (JOB TITLE):** | Head of Digital and Data | |
| **JOB PURPOSE**  IOP is working to make significant improvements to its utilisation of data. We have a number of departments using data from a range of sources and using processes which have developed over time. We already use Salesforce in the business and are now looking to further extend its use across the IOP, together with standardisation and enhanced business processes which will deliver data automation, improvements and efficacies. This is a large scale, cross cutting organisational change project.  The role of Salesforce Administrator has been created in order ensure that Salesforce is responsive to business needs through a process of stakeholder engagement and continuous improvement; and to provide on-going support to users.  Specifically you will be responsible for:   1. Management and development of Salesforce 2. Management of application requirements and delivery of improvement to business processes, including project management of database projects. 3. User support and training   This role is managed by the Head of Digital and Data. | | |
| **ORGANISATIONAL STRUCTURE** | | |
| **CONTEXT**  **The department’s** **purpose**  The Digital and Data Team are responsible for developing and delivering the IOP’s digital and data strategies; driving innovation in digital and data across the organisation; proposing digital solutions to the IOP’s ambitions and user needs and ensuring that our data is secure, compliant, accurate, available and recoverable.  **The job’s context**  We are now extending our use of Salesforce across the organisation together with standardisation and enhanced business processes. The Salesforce Administrator will support this transformation process through daily management of Salesforce; delivering on-going development in response to business needs and providing user support and training.  **TASKS & ACCOUNTABILITIES**   1. Support the on-going development of Salesforce across the IOP including teams’ requirements aligned with business needs. 2. Create and document new application requirements by working together with those involved in specifying enhancements and changes, including workflow rules, Approval Processes and Validation Rules. 3. Develop and manage in-depth reports and dashboards for critical objects like payments, recurring and one-off donations, accounts, contacts etc 4. Analyse current processes as well as new functionality, making and implementing approved recommendations for improvements to streamline business process and efficiency 5. Daily administration of Salesforce: managing workflow rules, formula fields, approval and escalation rules, configuration of single or multiple user set up, profiles and roles, customisation of objectives, fields, record types, page layouts and validations 6. Responsible for creating and maintaining documentation on processes, policies, application configuration. 7. Provision of user support 8. Logging and tracking identified system problems through to resolution 9. Deliver training and support to all new and existing users for new features and functionality   **SCOPE OF DECISION MAKING / CHALLENGES**   1. Ensuring that Salesforce is developed to respond appropriately to business needs 2. Provision of user support and training to users with varying levels of familiarly and engagement 3. Supporting Salesforce as the single data management system in the organisation, ensuring users are able to make the most of Salesforce.   **DIMENSIONS**   * Business wide roll out of Salesforce in April 2018 as only CRM * Approx. 150 Salesforce users | | |
| **KNOWLEDGE, SKILLS & EXPERIENCE**  *The below are the skills, qualifications, membership requirements and experiences that are* ***necessary*** *for full and effective performance of this role unless otherwise stated*  **Skills**   * CRM and databases – administration, creation of custom reports and dashboards, development of application requirements * Continuous improvement mind-set – Always looking to improve current processes and databases. * Organisational skills - ability to work with minimum supervision, prioritise workload, and handle multiple tasks * Dependable – able to complete tasks to high standard and to deadline * Team player – the ability to work co-operatively with others to achieve common goals * Proactive – to think ahead and act to ensure the smooth completion of team / individual aims and objectives * Negotiation skills – the capability to explore different positions and alternatives to reach outcomes that gain acceptance of all parties * Interpersonal skills – ability to positively communicate with others; the confidence to listen and understand * Communication skills - ability to express information clearly and effectively in written and oral form   **Experience**   * A certified Salesforce administrator with at least 2 years of experience * Evidence of effective use of customer relationship management systems, including Excel and dashboards * Successful ongoing delivery of user support and training, to varied audiences Proven ability to deliver improvements to data processes. * 2+ year experience of managing projects, ideally in different methodologies such as Waterfall and Agile Proven ability to design and deliver data automation. Evidence of strong relationship management | |
| **COMPETENCIES**  *The behaviours that must be demonstrated in the job*   * Drive for results – Can be counted on to meet or exceed goals successfully * Managing and measuring work – Takes responsibility for tasks and decisions * Customer focus – Is dedicated to meeting the expectations and requirements of internal and external customers / partners * Functional/technical skills - Has the functional and technical knowledge and skills to do the job at a high level of accomplishment * Personal learning - Picks up on the need to change personal, interpersonal, and where applicable managerial behaviour quickly | |