

# SALESFORCE OFFICER/ADMINISTRATOR

## JOB SPECIFICATION

|               |  |
|---------------|--|
| REPORTING TO: | Database Officer (senior role)   |
| COMMITMENT:   | Full-time; fixed-term contract for 6 months with potential to become permanent |
| SALARY:       | Circa £25,000pa  |
| LOCATION:     | London SE1   |
| ANNUAL LEAVE: | Unlimited annual leave (new trial policy)                                      |

## ABOUT CALM

The Campaign Against Living Miserably, CALM, exists to prevent male suicide, currently the single biggest cause of death for men under 45 in the UK. On average, 12 men take their own life each day, and 3 out of every 4 UK suicides are male.

Our free, confidential, and anonymous helpline and webchat service operates every day of the year, 5pm to midnight, for any man in the UK who is feeling down or depressed. Through our campaigns and engagement activities, CALM aims to change culture and notions of masculinity so that men feel able to seek help before they reach a point of crisis, and family and friends feel better able to support each other.

## INTRODUCTION

CALM manages a supporters' database in a Salesforce NPSP (Nonprofit Success Pack) instance. We collect data through Form Assembly, such as donations, event registrations, orders etc., as well as export data from fundraising platforms (Just Giving, Virgin Money Giving, Everyday Hero and others) to import into our Salesforce CRM. We're a growing organisation with ambitious targets. This role will actively support all areas of the organisation, ideal for someone looking to broaden or develop their experience in the sector or with Salesforce.

## KEY FOCUS

- Support Salesforce Officer (senior) in all aspects of database management and development
- Provide guidance and training across the organisation to users
- Be first port of call for internal queries and troubleshooting (via cases)

## ROLE DESCRIPTION

- Help maintain secure, clean, accurate and up-to-date database
- Support the fundraising, engagement and communications teams with day to day reporting and mass mailing
- Create and edit Salesforce list views, reports, dashboards, fields, page layouts, users
- Make sure all (c.20) internal users have access to updated and relevant page layouts and fields, according to their responsibilities
- Investigate solutions for integration of Outlook communications with Salesforce
- Actively check for duplicates and come up with suggestions for prevention
- Retrieving and preparing data from a range of sources for upload, using Excel formulas (especially Vlookup), conditional highlighting, filters, formatting etc. to manipulate data
- Carry out induction sessions with new users, and training sessions on Salesforce reporting, efficient usage, updates etc.
- Develop refresher training for current users
- Create documentation on system changes through a designated Salesforce object
- Be a part of a project team, start to end on all Salesforce aspects

We are looking for an outstanding individual with the following qualities:

- Outstanding attention to detail, coupled with problem-solving skills
- Excellent communication and analytical skills
- Able to use own initiative and manage competing priorities
- Able to work in a fast-paced and demanding environment
- Energetic, enthusiastic with a can-do attitude
- Passionate and keen to learn
- Able to work independently and collaboratively with people on projects.

## **HOW TO APPLY?**

Please submit your CV and supporting statement here: <https://www.tfaforms.com/4677804> by Tuesday 19 June 2018. Please address every point in the Person Specification below in your supporting statement. Interviews will take place between 3 and 6 July 2018.

## PERSON SPECIFICATION

| Experience Required  | Essential (E) / Desirable (D) |
|--|-------------------------------|
| Managing a Salesforce database as a System Administrator                               | E                             |
| Experienced Excel user with the confidence and ability to manipulate large data tables | E                             |
| Using the Data Loader to insert, update and delete data                                | E                             |
| Building and maintaining Form Assembly forms   | D                             |
| Using or implementing Volunteers for Salesforce  | D                             |
| Salesforce Certified Administrator (ADM 201)   | D                             |
| Educated to degree level, or equivalent professional experience                        | E                             |
| Previous involvement or contribution to CALM's campaigns                               | D                             |
|  |                               |
| <b>Skills and Knowledge</b>  |                               |
| Familiar with Salesforce communities   | E                             |
| Trailhead badges   | D                             |
| Ability to investigate online and come up with technical solutions                     | E                             |
| Understands Salesforce formula fields, workflows and Process Builder                   | D                             |
| Excellent verbal and written communication skills                                      | E                             |
| Excellent interpersonal skills   | E                             |
| Excellent time-management and organisational skills                                    | E                             |
| Good level of IT literacy, including Word, Excel, and Outlook                          | E                             |
|  |                               |
| <b>Personal Qualities</b>  |                               |
| Able to work independently   | E                             |
| Outstanding attention to detail  | E                             |
| Able to use initiative   | E                             |
| Proven ability to work as part of a team   | E                             |
| Proactive problem solver   | E                             |
| Able to work in a flexible, approachable manner  | E                             |
| Non-judgemental and inclusive approach   | E                             |
| Passion/interest in CALM and the issue of male suicide                                 | D                             |
| Able to work in line with CALM's ethos, policies and branding                          | E                             |