

Job Description

Location(s)	Hybrid (home and office) AdviceUK Suite 610, 150 Minories London, EC3N 1LS
Job Title:	Salesforce Administrator (and Pardot Admin Support)
Status:	15 months contract (3 months probation) start in June- July 2023
Responsible to:	Head of Systems and Operations
Pay Scale :	£37.000 - £40.000 (pro rata)
Working hours:	28 hours per week Normally 7 hours per day Mon - Fri 9.00am - 5.00pm with a 1 hour (unpaid) break for lunch
Special conditions:	Some evening and weekend work may be required for which time off in lieu (TOIL) will be granted. Occasional travel may be required which may entail overnight stays.

Job Context

AdviceUK is a charitable membership organisation providing co-ordination and assistance to independent local advice agencies. Most member centres are registered charities providing a service to disadvantaged communities.

We add value to the work of our member centres by providing training & qualifications and organisational support on issues such as funding, development and governance. We seek to provide a policy voice on relations with government, funders and regulators and the development of public policy. We also offer a range of services to members and other advice agencies to assist them with the practical running of their centres.

The Salesforce Administrator works within the Systems and Operations team to manage the administration of Salesforce and integrated Systems (Fonteva and Pardot).

Job Purpose

- Be the primary system administrator and custodian of AUK's Salesforce / Fonteva instance.
- Maintain, improve and help develop the usefulness and performance of the Salesforce / Fonteva functionalities for all of the organisation's users (internal and external).

- Manage Pardot Administration in collaboration with the marketing team.
- Be the main administrator of Ownbackup

Key tasks and responsibilities

1. Systems Administration

- 1.1. Serve as primary system administrator and custodian of Salesforce / Fonteva.
- 1.2. Provide strong understanding of Salesforce best practices and functionality.
- 1.3. Provide users & license management including new user set up/deactivation, profiles & permission sets.
- 1.4. Manage external (Experience Cloud) user records to support access to the Experience Cloud customer portal site.
- 1.5. Insert, update and maintain Salesforce data as needed (eg. Data uploads).
- 1.6. Provide Salesforce Config changes (not limited to): Flow, Process Builder, Fields, Page Layouts, Record Types, Validation Rules.
- 1.7. Support the Finance Team with any systems issues (Sales Orders, reports, membership subscriptions)
- 1.8. Create reports and dashboards for all teams and manage access to report folders.
- 1.9. Provide training to internal users following Salesforce best practices.
- 1.10. In liaison with the Head of Systems and Operations deal with all Internal Systems Cases by gathering requirements from users and follow AdviceUK's Systems Changes Policy prior to making any change.
- 1.11. Liaise with users across all teams to improve user adoption and initiate new business processes.
- 1.12. Manage the Systems inbox (Monday to Friday).
- 1.13. Support the Head of Systems and Operations with the Systems Road Map and create reports for presentation to the AdviceUK board of trustees and others.
- 1.14. Attend meetings and liaise with stakeholders such as Salesforce implementation suppliers, account managers and relevant service suppliers.
- 1.15. Be responsible to update and maintain existing documentation and training materials.
- 1.16. Ensure Onwbackup backups run smoothly and troubleshoot if necessary.

2. Projects and Systems Improvements

- 2.1. Keep abreast of all Salesforce, Pardot releases and Fonteva updates and be willing to undertake training.
- 2.2. Self-initiate research of Salesforce, Fonteva, Pardot and third-party apps integrated with Salesforce.
- 2.3. Support the Head of Systems & Operations with Salesforce implementation projects for internal and external stakeholders (including current integration project).

- 2.4. Prioritise user requests and distinguish user requests to determine what is in and out of project scope.
- 2.5. De-construct approved users requests into user stories.
- 2.6. Assist and guide users with testing of any new functionality.

3. PARDOT (Marketing Cloud Account Engagement) Administration

- 3.1. Perform basic tasks to ensure data integrity between Salesforce and MCAE
- 3.2. Manage users in MCAE
- 3.3. Perform Pardot Data imports / exports
- 3.4. Form management – testing, updates & changes, maintenance, tracking.
- 3.5. Connector monitoring
- 3.6. Create MCAE Connected Campaigns and manage existing automation
- 3.7. Build relevant reports
- 3.8. List and automation hygiene
- 3.9. Salesforce supporting MCAE
- 3.10. Manage Campaign Member status
- 3.11. Engagement History Enablement
- 3.12. Analyse Fields sync
- 3.13. Support the Marketing Consultant to improve the collection, management and analysis of data.

4. General (applying to all staff)

- 4.1 Liaise as necessary with other AdviceUK staff and contractors to ensure appropriate information exchange and co-ordination of activities.
- 4.2 Assist with all aspects of running the office when necessary (this is very minimal due to the new hybrid arrangements) .
- 4.3 Attend and participate in staff meetings, team meetings and 1:1 meetings with managers. Attend training sessions as appropriate.
- 4.4 Carry out any reasonable duties compatible with the post assigned by your line manager or senior managers.
- 4.5 Adhere at all times to AdviceUK's equal opportunities and health and safety policies, to AdviceUK's financial procedures and to other procedural guidelines.

To Apply

To apply for this role please email your CV and personal statement to systems@adviceuk.org.uk by 5pm BST on Thursday 1 June. Interviews will take place on Monday 5th June (10am – 1pm) and Tuesday 6th June (12pm – 3pm).

Person Specification

Salesforce Administrator

Set out below is the experience, knowledge, abilities and attitude we are seeking in the successful candidate. When applying using a CV and/or personal statement, you will need to tell us how you meet these criteria by providing evidence and relevant examples from your previous work experience, other personal experiences or qualifications. The columns to the right of the criteria indicate how each one will be assessed.

A = By application I = By interview TP = By test or presentation

CRITERIA	ASSESSMENT		
	A	I	TP
Qualifications / Experience / knowledge			
1. Salesforce Administrator Certification and two-year Salesforce experience.	✓	✓	✓
2. Excellent knowledge of Sales Cloud and basic understanding of Salesforce Experience Cloud and Pardot /MCAE	✓	✓	✓
3. General understanding of CRMs and record systems.	✓	✓	
4. Varied work experience including positions of responsibility and implementation of change.	✓	✓	
Skills and Abilities			
5. Project management skills.	✓	✓	
6. Ability to apply knowledge to new challenges & situations and devise solutions.		✓	✓
7. Ability to manage multiple tasks and work independently as well as part of a team.		✓	
8. Strong communication skills (written and verbal) and interpersonal skills.		✓	✓
9. General computer literacy, including use of office applications and other relevant software.	✓		

Attitude			
10. Commitment to high standards of work and personal conduct.		✓	
11. Self-motivated, self-disciplined, hard-working and resilient with an appetite for personal responsibility.		✓	
12. Positive and flexible attitude to work within a dynamic and changing environment.		✓	
13. Supportive (not directive) and collaborative approach to work.		✓	
14. Enterprising, commercially-minded approach to problem-solving, income generation and charity sustainability.		✓	
15. Personal awareness of strengths & limitations; willingness to undertake training & development activities.		✓	