

## Job Description

<b>Location(s)</b>	Home-based with attendance in the office or at meetings as required  AdviceUK Suite 610, 150 Minories London, EC3N 1LS
<b>Job Title:</b>	<b>Salesforce Administrator Maternity Cover</b>
<b>Status:</b>	9 months contract (3 months probation) February– October 2023
<b>Reporting to:</b>	Head of Systems and Operations
<b>Pay Scale :</b>	£35.000– £38.000 (pro rata)
<b>Working hours:</b>	21 hours per week  Full time hours are 35 hours per week within normal operating hours. (Normal operating hours are 8.00am – 6.30pm, Monday – Friday.) Lunch & other breaks are unpaid.
<b>Special conditions:</b>	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 PURPOSE

The Salesforce Administrator works within the Systems and Operations team to manage the administration of Salesforce and integrated Systems (Fonteva and occasionally Marketing Cloud Account Engagement—with the support of the Business Analyst).

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 the organisation's users.

### KEY TASKS AND RESPONSIBILITIES

1. Serve as primary system administrator and custodian of Salesforce / Fonteva.
2. Apply strong understanding of Salesforce best practices and functionality.
3. Provide users & license management including new user set up/deactivation, profiles & permission sets.
4. Manage external (Experience Cloud) user records to support access to the Experience Cloud customer portal site.

5. Insert, update and maintain Salesforce data as needed (eg. Data manipulations and uploads).
6. Implement Salesforce configuration changes (not limited to): Flow, Process Builder, Fields, Page Layouts, Record Types, Validation Rules.
7. Support all teams with any systems issues including trouble shooting for Salesforce integrations.
8. In liaison with the Head of Systems and Operations and Business Analyst review, prioritise and action internal Systems Cases by gathering requirements from users and follow AdviceUK's Systems Changes Policy prior to making any change.
9. Liaise with users across all teams to improve user adoption and initiate new business processes.
10. Create or review reports and dashboards for all teams and manage access to report folders.
11. Provide training to internal users following Salesforce best practice.
12. Initiate new processes and facilitate user adoption.
13. In liaison with the Business Analyst, assist users with testing of any new functionality.
14. Attend meetings and liaise with stakeholders such as Salesforce implementation partners, suppliers, account managers.

### **Projects and Systems Improvements**

15. Keep abreast of all Salesforce, Pardot releases and Fonteva updates and be willing to undertake training.
16. Self-initiate research of Salesforce, Fonteva, Pardot and third-party apps integrated with Salesforce.
17. Support the Head of Systems & Operations with Salesforce implementation projects for internal and external stakeholders (including current integration project).
18. Critically evaluate information gathered from multiple sources/ project teams, de-construct high level requests into understandable instructions, distinguish user requests from the underlying true needs of the system and how it is set up and reconcile conflicts.
19. Prioritise user requests and distinguish user requests to determine what is in and out of project scope.
20. De-construct approved users requests into user stories.

### **General responsibilities**

21. Ensure you effectively communicate AdviceUK's vision, mission and objectives to staff and external stakeholders.
22. Build and maintain positive relationships with key stakeholders including trustees; members, partners and suppliers
23. With support from your manager, deliver your agreed personal objectives and undertake any agreed development or training

- 24. Stay up to date with AdviceUK's work and attend all agreed meetings and events
- 25. Always adhere to AdviceUK's policies and procedures
- 26. Ensure you consistently demonstrate AdviceUK's values and behaviours
- 27. Carry out any reasonable duties compatible with the post assigned by the Head of Department

## PERSON SPECIFICATION

### Salesforce Administrator (maternity cover)

Set out below is the experience, knowledge, values and behaviours we are seeking in the successful candidate. When applying you will need to show how you meet these criteria by providing relevant evidence or examples from education & training, paid or unpaid work experience and other personal experiences. How each criterion is marked and at what stage is set out below.

A = By Application    I = By Interview    P = By Test or Presentation

CRITERIA	ASSESSMENT		
	A	I	TP
<b>1. Experience</b>			
Salesforce Administrator certification (in date)	P	P	
Experience in working in on a Salesforce production org	P		
Experience in customising Salesforce	P	P	P
Project management	P		
Ability to provide training	P	P	
Ability to communicate with internal and external stakeholders	P	P	
Ability to multitask and prioritise	P	P	
Ability to work independently and as part of a team	P	P	
General computer literacy, including use of office applications and other relevant software.	P		
	P		
<b>2.Values and behaviours</b>			
Commitment to high standards of work, professional conduct and personal conduct.		P	
Self-motivated, self-disciplined, hard-working and resilient with an appetite for personal responsibility.		P	
Flexible/adaptable.		P	
Supportive and collaborative approach to work.		P	
Personal awareness of strengths & limitations; willingness to undertake training & development activities.		P	