

<b>JOB DESCRIPTION</b>
------------------------

**Location(s):** AdviceUK

Suite 610, 150 Minorities London EC3N 1LS

Home-based with attendance in the office or at meetings as required

**Job Title:** Salesforce Administrator (Junior)

**Status:** Fixed term until March 2026

**Reporting to:** Systems Manager

**Responsible for:** n/a

**Pay scale:** Point 25 on AdviceUK's incremental pay scale

**FTE** - £32,509 per annum + Regional weighting allowance +  
£600 home working allowance

**Actual** - £19,505 per annum+ Regional weighting allowance +  
£360 home working allowance

Regional weighing allowance is based upon your usual  
working location in the UK.

**Working hours:** 21 hours per week (0.6 FTE) within normal operating hours.  
(Normal operating hours are 8.00am - 6.30pm, Monday –  
Friday.) Lunch & other breaks are unpaid.

**Special conditions:** Some evening and weekend work may be required for which  
time off in lieu (TOIL) will be granted. Some travel will be  
required which may entail some overnight stays.

**Application process:** Please apply by CV with a covering letter explaining why  
you'd like to join the team at AdviceUK. Email both to  
[systems@adviceuk.org.uk](mailto:systems@adviceuk.org.uk) by **9am on 1<sup>st</sup> May**.

## **JOB PURPOSE**

To support the Systems and Technology team in maintaining and improving the usefulness and performance of Salesforce and Fonteva functionalities for all of the organisation's users (internal and external), to the benefit of people seeking advice and the communities served by our members.

In particular, manage the creation of reports and dissemination of the AdviceUK data strategy, via the use of Salesforce reports and dashboards.

## **KEY TASKS AND RESPONSIBILITIES**

### **1. Systems Administration**

1. Apply a strong understanding of Salesforce best practices and functionality to improve systems performance.
2. Support the Systems Team with all systems administration tasks, including but not limited to, user & license management, new user set up, deactivation, profiles & permission sets.
3. Support the Systems Team with configuration changes, including but not limited to: process automation (flow, process builder,) user design (page layouts, record types and data management (field updates, validation rules etc)
4. Support all teams with any Salesforce issues, raised via support cases in a proactive and timely manner
5. Create reports and dashboards for all teams. Review manage access to report folders.
6. Plan, document and deliver training to internal users following Salesforce best practices.
7. Work with the Systems team to document updates and changes to the system following the change management plan and processes.
8. Manage the Systems inbox (Outlook) in collaboration with the Systems Manager and Salesforce Administrator.
9. Attend essential internal meetings.

### **2. Data Strategy**

1. Agree data strategy priorities with the Head of Systems and Technology, the Systems Manager and relevant colleagues.
2. Evaluate the current data strategy (lessons learnt session) and help plan the second iteration.
3. Create the Salesforce reports needed to deliver the latest iteration of the AdviceUK data strategy
4. Plan and execute a strategy to disseminate the data to internal users in ways that are accessible and digestible

### **3. General responsibilities**

1. Ensure you effectively communicate AdviceUK's vision, mission and objectives to staff, members and external stakeholders.

2. Ensure you demonstrate AdviceUK's values and behaviours in all aspects of your work
3. Build and maintain positive relationships with key stakeholders including staff trustees; members, partners and suppliers
4. With support from your manager, deliver your agreed personal objectives and undertake any agreed development or training
5. Maintain a strong understanding of our members and the advice sector more generally, by reading internal reports; accessing relevant data reports; following our social media channels and, where possible, attending member and other relevant events. With the agreement of you line manager, ensure you make time to speak to members and visit their services.
6. Adhere at all times to AdviceUK's policies and procedures
7. Carry out any reasonable duties compatible with the post assigned by your line manager

## PERSON SPECIFICATION

### Salesforce Administrator (Junior)

Set out below is the minimum level of 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>Experience</b>			
Ideally 1 year experience of Salesforce in an admin role, in an organisation of similar size and complexity	X	X	
Understanding of the non-profit sector and its challenges	X	X	
Delivering effective technology support to users	X	X	X
Working with colleagues to deliver projects successfully	X	X	
Interest in championing innovation and continuous improvement	X	X	
<b>Skills and Abilities</b>			
Ability to apply knowledge to new challenges/situations; & devise solutions.		X	X
Ability to build and maintain strong working relationships with peers, managers, partners and suppliers	X	X	
Strong analytical thinking and decision-making skills, with ability to translate data and evidence into actionable insights that inform decision making	X	X	x
Excellent organisational skills; ability to prioritise own workload and accommodate competing demands	x	x	
Strong communication skills (written and verbal), in particular an ability to explain complex technological concepts in an accessible way		X	X

Effective interpersonal skills, with the ability to work with diverse stakeholders and communities		x	x
<b>Knowledge and qualifications (where relevant)</b>			
Salesforce Admin certification in date	x	x	x
Evidence of a commitment to continued learning			
<b>Values and behaviours</b>			
Commitment to social justice, equality, diversity and inclusion	x	x	
Commitment to AdviceUK's values and behaviours	x	x	
Self-motivated, self-disciplined, hard-working and resilient with an appetite for personal responsibility.		x	
Flexible/adaptable in order to engage with others and to achieve both personal and team objectives.		x	
Personal awareness of strengths & limitations; a pro -active learning mind set, with a willingness to undertake training & development activities.			
Commitment to high standards of work and personal conduct		x	