|  |  |
| --- | --- |
| Job Title: | **Salesforce Specialist** |
| Department: | **Community Services** |
| Reports to: | **Financial Management Services Manager** |
| Grade: | **DS** |
| Supervises: | **N/A** |
| FLSA Status: | **Non-exempt** |
| Prepared by: | **Karen Emerson** |
| Date: | **February 3, 2021** |
|  |
| Purpose:The Salesforce Specialist serves as a member of the Financial Management Services team, taking responsibility for development of the Homeownership Center’s customer service culture and demonstrating the value of Salesforce in driving the program’s goals and objectives using data managed. |
| Essential functions:* Serves as the Northwest Michigan Community Action Agency’s primary liaison between the agency and the NeighborWorks America Sustainable Business Initiative Program (SBI) team. Attends weekly and monthly telephonic meetings and webinars, as well as scheduled in person convenings in various national locations.
* Works closely with NMCAA management team in set up and transition of SalesForce by supplying reports and daily progress updates in organized agency SBI meetings.
* Has administrative rights within Salesforce and is responsible for setting up new users and grants appropriate access to team.
* The Salesforce Champion manages development of the SHP Tech Suite (Customer Facing Technology tool {Compass}, Stripe, Setster) adding custom fields, adjusting page layouts, etc., and coordinates transaction activity.
* Represent NMCAA as the Tableau Fellow. Working on various projects assigned to further the agency transition to being a data driven organization.
* Together with other SBI team members, lead the development of a culture for customer service excellence.
* Evaluate, maintain, and update Customer Facing Technology (CFT) as required to support Homeownership service line and additional lines of business.
* Work closely with Intake-Leads Specialist, Marketing Specialist and Management to monitor marketing and conversion rates of new customers.
* Train and maintain training for all Homeownership team members on the appropriate and required use, data input and updates and changes to SalesForce.
* Functionally manage the responsibilities of CFT Leads Managers.
* Serve as a trouble shooter for line staff using SalesForce and constantly striving to utilize SalesForce in new/different ways to increase efficiency and/or production.
* Design and develop appropriate reports for management team use.
* Completes reporting for the Homeownership service line and other lines of business as they are developed while working in cooperation with the FMS Program Specialist and Manager.
* Serve as liaison between SalesForce programmatic functions/staff and NMCAA’s business office functions/staff.
* Other duties as assigned.
 |
| Position Objectives:* To lead the design and develop NMCAA’s Customer Relationship Management tool (Salesforce-Shop Tech suite) coordinating with internal management to assist agency in social enterprise development.
 |
| **Measured by:*** Evaluation
 |
| **Minimum Education:*** Bachelor’s degree
* Completes the Saleforce ADM-201 Administration Essentials for New Admins-5-day training course
 |
| **Minimum Experience:*** Salesforce experience
* Computer experience
* Working on a team to achieve a common project goal
 |
| **Essential Abilities:*** A commitment to the NMCAA philosophy and mission.
* Ability to maintain confidentiality.
* Ability to interact positively with co-workers and clients in a non-judgmental, tactful and courteous manner.
* Ability to suggest innovative approaches in completing job responsibilities.
* Ability to work openly and cooperatively as a team member.
* Ability to perform physical tasks to carry out specific job duties.
 |
| **Minimum Skills Required:*** Salesforce experience
* Computer experience
 |
| **Minimum Physical Expectations:*** Physical activity that always involves keyboarding, sitting, phone work, and filing.
* Physical activity that often requires extensive time working on a computer.
 |
| **Minimum Environmental Expectations:**The Salesforce Champion operates in an office setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines. |