

Salesforce Manager – Role Profile

Job Title	Salesforce Manager
Grade	Higher Executive Officer (HEO)
Department	Stakeholder Engagement
Directorate	Business Development and Information
Role reports to	Head of Stakeholder Management
Role Purpose	Working day to day with Salesforce users across RoS, you will be a strong advocate of Salesforce, responsible for all aspects of management and administration of system. This will include identifying and delivering enhancements to support business and marketing needs, capturing customer touch points, data quality checking and reporting.
Location	Meadowbank House, Edinburgh

JOB DESCRIPTION

Main duties/tasks	<p>You will understand and proactively monitor all aspects of the Salesforce system and technical / functional capabilities, ensure the system is maintained and up to date, work with third-party integrations and support business initiatives with tailored reporting and dashboards.</p> <p>User Support and Teamwork</p> <ul style="list-style-type: none"> You will build effective relationships across all areas of the business to enhance end-user experience and adoption. Provide routine support and user maintenance for Salesforce – new starters, position changes, profile changes, hierarchies, leavers, user lockouts and password resets. Proactively gather requirements and feedback from users, and configure/develop the system to best support these needs. Monitor usage to measure user engagement and identify knowledge gaps and deliver training to Salesforce users to continuously improve the support levels offered. Create a strong Salesforce community in RoS, communicating regularly with users regarding new features, enhancements and changes to the system. <p>Data quality, Migration and Security</p> <ul style="list-style-type: none"> Monitor and improve data quality, storage usage and archive data as needed. Ensure data integrity by merging duplicates; performing mass uploads and updates of data as required; removing unnecessary fields and data. Maintain security including sharing rules and security levels. Ensure full compliance with privacy and security regulations, including tracking and monitoring of data permissions relating to GDPR. Document workflows and processes, configuring the system to ensure screens, fields and workflow have accurate names and reflect current workflow. <p>Active system development and maintenance</p> <ul style="list-style-type: none"> Migrate system from classic to Salesforce Lightning, and roll out training aligned with this change to users. Identify, develop and support the integration of 3rd party applications Configure and develop the system to increase business benefits and usability. Create and maintain fields, views, reports, dashboards, campaigns and other standard salesforce.com, custom objects and functions. Continually seek ways to further enhance the end-user experience by utilising system automations, customisations and alterations. <p>Management Intelligence</p> <ul style="list-style-type: none"> Create, manage and curate reports and dashboards.
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	<ul style="list-style-type: none"> • Maintain a holistic view of all business processes and users in the system to understand cross-functional impacts with regard to configuration, process, workflow and reporting. • Create new reporting capabilities, respond to ad hoc reporting requests, and train users to generate their own reports as required.
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PERSON SPECIFICATION	
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Essential criteria	<p>Changing and improving Display initiative in identifying improvements, sharing with and updating colleagues in a constructive manner and supporting others to understand change. Combine the ability to implement complex changes whilst taking into consideration the wider impact and mitigation of risks to the business.</p> <p>Delivering a quality service Possess the ability to work autonomously and prioritise work effectively, reviewing plans regularly to meet agreed deadlines, whilst addressing the needs of stakeholders and the wider business to deliver high quality service.</p> <p>Analysis and making effective decisions Ability to collate and analyse information, with excellent attention to detail, using various internal systems to produce evidence based reports for management intelligence and record management.</p> <p>Leading and communicating Demonstrate excellent written and verbal communication, tailored to meet the needs of the audience; understanding and tracking customer engagement whilst supporting the promotion of products/ services and presenting information.</p> <p>Collaborating and partnering Ability to work as part of a team, building positive relationships with internal and external stakeholders at all levels. Proactive in knowledge sharing and seeking feedback to create greater efficiencies.</p>
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TECHNICAL SPECIFICATION	
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Essential criteria	<ul style="list-style-type: none"> • Experienced as Salesforce administrator or developer. • Strong knowledge of Salesforce Lightning, and Salesforce suite of products • Expertise in Salesforce architecture, processes/flows, testing and deployment, and wide exposure to 3rd party applications and integrations. • Ideally experience with unit testing, deploying change sets from SF sandbox environments. • Previous re-engineering experience updating an existing Salesforce.com configuration to provide solutions for reporting, workflows and enhanced functions. • Salesforce Certified Sales Cloud Consultant or equivalent experience in translating business requirements to the Salesforce platform. • Salesforce Certified Administrator. • Service Cloud Basics Badge.
Desirable criteria	<ul style="list-style-type: none"> • Certified Salesforce Service Cloud Consultant. • Certified Platform App Builder. • Bachelors degree.