

Job Description

Post Title	Salesforce Administrator
Department	Data Management and IT
Reports to	Finance Director
Responsible for	Day-to-day management, support, and optimisation of the Salesforce CRM, focusing on Sales Cloud and existing integrations, with oversight for Windsor Leadership's (WL) computer networks, hardware and software. Preparing and collaborating with the implementation of Salesforce Experience Cloud and Education Cloud.
Location	Windsor
Salary Guide	£35k to £40k per annum dependant on experience

About Windsor Leadership

Windsor Leadership believes that exceptional leaders have a powerful and positive impact on society. By running a series of leadership development programmes for senior leaders from all sectors of society, we aim to inspire leaders who have the potential to shape the future of society.

For more details about Windsor Leadership visit: www.windsorleadership.org.uk

FURTHER DETAILS

We currently use Salesforce Sales Cloud and Nonprofit Success Pack (NPSP) to support our core business processes.

Our database is integrated with FormAssembly and Mailchimp (using a Beaufort12 connector). We have recently implemented SurveyVista as our native survey solution and expect to transition all forms and surveys to Survey (Form) Vista by early 2027.

We also use an Alumni portal which is a stand-alone application at present. We plan to transition to a more modern Alumni portal (potentially Experience Cloud) in 2027. To facilitate this, we are considering Education Cloud or Agentforce Nonprofit.

Supervision received: Direct reporting to the Finance Director.

Other activities: Postholders will undertake other appropriate activities and projects related to Salesforce and systems security.

Terms and conditions: This is a permanent role on a full-time basis.

This document outlines the duties required for the time being of the post to indicate the level of responsibility. It is not a comprehensive or exhaustive list, and the line manager may vary duties from time to time which do not change the general character of the job or the level of responsibility entailed.

CORE RESPONSIBILITIES	
Salesforce Administration	• Manage and maintain the Salesforce access and security, including user setup, data cleansing, profiles, roles, permission sets, permission set groups, and security settings. • Perform regular system audits and prepare for Salesforce releases (Release Updates, new and changed functionalities, especially quick wins). • Troubleshoot and resolve issues related to Salesforce existing functionality and integrations. • Ensure data integrity and implement best practices for data management, including data imports, exports, and data cleansing. • Configure new and manage existing objects, fields, flows and validation rules to support the business processes • Manage and prioritise the IT and Salesforce backlog • Introduce User Experience improvements as additional functionalities are released by Salesforce or as the business processes change (e.g. record page changes) • Provide support and training to end-users to ensure they are effectively utilising the platform. • Create and maintain reports and dashboards. • Maintain and Support FormAssembly forms. • Maintain and Support SurveyVista forms/surveys. • Provide requirements and test SurveyVista solutions generated by the Ardira delivery team. Perform timely implementation for SurveyVista release updates. • Ensuring the cyber security compliance, best practice and stability across the Salesforce estate • Managing a positive Health check Score on Salesforce
Collaboration and Communication	• Work closely with stakeholders to gather business requirements, understand their needs, and translate them into effective Salesforce solutions. • Propose and implement solutions that address business challenges while aligning with best practices. • Troubleshoot and resolve issues by working collaboratively with stakeholders, ensuring that their concerns are addressed promptly and effectively. • Communicate effectively with non-technical staff to explain complex Salesforce concepts and solutions. • Liaise with Salesforce support, Salesforce volunteers and third-party vendors as necessary.
Experience and Education Cloud / Agentforce Nonprofit Implementation	• Collaborate with the business to plan and execute the implementation of Salesforce Experience Cloud and/or Education Cloud/Agentforce Nonprofit. • Work with the Project Manager and Third-party vendor(s) to support gathering and documenting business requirements, design solutions, and configuring the Experience Cloud solution to meet organisational needs. • Provide ongoing support and administration post-implementation.

(Potential Future Initiatives)	• Map data from existing systems to new CRM
IT and Security (outsourced)	Responsible for delivery and maintenance of security controls required to protect the company and its systems against cyber-attacks, with the support of the third party IT supplier. • Create, delete and amend user access rights and permissions creating a 'User Account Control Register' • Ensure MFA is installed on all software and hardware, meeting Cyber Essentials requirements. • Ensure all staff have remote access using a VPN. • Ensure the security and use of WiFi Guest password. • Oversee all data backup and system security • Manage the safe storage of all data • Remove obsolete data from Salesforce. • Manage the cyber security training programme for the Windsor Leadership team using the Wizer platform • Ensure storage requirements on shared drives/directories are met • Maintain Cyber Essentials Security Accreditation and comply with other regulations expected by our partners and current legislation. • Liaise with the GDPR lead to ensure compliance in the CRM • Liaise with outsourced supplier on all issues related to IT, act as a point of escalation for the team for IT tickets. • In collaboration with the Finance Director, verify expenditure on IT budget. • In collaboration with the Finance Director, support the IT onboarding of starters and the administration for leavers. • In collaboration with the Finance Director, regularly review the IT Policy documents for statutory compliance and good practice
Continuous Improvement	• Stay updated on Salesforce features, releases, and best practices to recommend and implement improvements. • Participate in Salesforce community groups, forums, and training sessions to enhance skills and knowledge. • Lead or participate in Salesforce-related projects, including upgrades, integrations, and new feature implementations • Ensure compliance with industry recommended best practice. • Conduct internal training where necessary

Person Specification

Criteria	Essential	Desirable
Skills Required	<u>Proven experience of:</u> Excellent problem-solving skills with the ability to troubleshoot issues Strong communication skills, with the ability to translate technical concepts into business terms and engage with internal and external stakeholders at all levels Ability to manage multiple priorities and tasks Attention to detail and high level of accuracy and methodical working Strong organisational skills, with the ability to apply them to multiple events and prioritise when necessary Experience of managing self in a team context and ability to develop strong relationships MS Office, especially Word and Excel Competence in online meeting platforms (Zoom, Teams etc.)	Experience with platform/ data migration Experience in ensuring cyber security compliance, best practice and stability across the Salesforce estate Experience in validating and managing what vendors and offsite 3rd parties create
Attainment	Professional Salesforce Certification Experience in an IT role	Degree level qualification or equivalent experience Experience of IT Service Management for Incident, Problem, Change and Release management Knowledge of Agile project management principles and practices

TO APPLY

Please send a current copy of your CV with a letter supporting your application, saying why you are suitable for this post, to: Catherine Rodgers, Finance Director
catherine.rodgers@windsorleadership.org.uk