



## Salesforce Champion

---

Department/Division: Regional Operations

FSLA Status: Full-time, Non-exempt

---

**NeighborWorks® Community Partners – *Our mission is to provide housing solutions as a foundation for individuals, families and neighborhoods to build vibrant communities.*** This is the focus of our work every day and is manifested via first time homebuyer education, financial fitness counseling, home improvement lending, and energy conservation services. Our neighborhood revitalization program assists targeted neighborhoods within our community, building resident engagement as well as economic stability.

### About the Position

The Salesforce Champion's (SFC) primary responsibilities include data governance and monitoring the integrity of data housed in a relational database. The SFC position is considered support staff for our front-line employees, back office and management team members. The individual in this position will report to and assist the Regional Operations Manager with implementation of key projects focused on transforming a dedicated, service-oriented organization into a thriving social enterprise aimed at achieving even greater impact within our communities.

### Essential Functions

- Complete the Salesforce "ADM-201 Administration Essentials for New Admins" 5-day training course, if needed.
- Work one-on-one with employees - Training
  - Workflow development
  - Process implementation
  - Best practices
    - Reinforcement of best practices
    - Fostering a continuous improvement loop
  - Out of office field work with our Energy Services and Residential Rehab teams
- Develop and deliver training sessions to staff on best practices in using technology, including document management, Windows 10 Professional, Office 365 and Salesforce.
- Monitor adoption of Salesforce within the organization and develop strategies to improve user adoption, managing the continuous improvement loop, facilitating feedback/engagement meetings on a regular basis.
- Help users understand the benefits of using Salesforce to manage their clients and workload through informal and formal training activities. Create jobs aids including written "How-to's" for front line staff all the way up to executive management.
- Be "on call" for staff, supporting their activities to ensure their productivity is at the highest level whenever possible.
- Attend NeighborWorks® Salesforce Champion monthly online meetings and webinars, as well as periodically scheduled in-person conferences (some travel required).

- Assist the Management Team with Quarterly Reporting to NeighborWorks® America, HUD, community partners and funders.
- Execute and often manage database clean up and data integrity practices.
- Maintain confidentiality and security of all data.
- Basic configuration and maintenance of the Salesforce platform:
  - New user setup
  - User access configurations
  - Creating custom report types
  - Assisting staff with creation of custom reports, as well as scheduling delivery of those reports
  - Creating and updating custom page layouts

#### Additional Responsibilities:

- Accomplishes all other duties and tasks as appropriately assigned or requested.

#### Key Skills and Attributes

- A self-starter with the ability to quickly gain proficiency in new software and demonstrate that proficiency to a variety of audiences in an effort to educate end users.
- Ability to identify areas of improvement for processes, policies and procedures.
- Management of complex and evolving processes and requirements.
- Highly organized, with the ability to identify and act on changing priorities.
- Consultative training skills to engage staff with learning, both in the classroom and through hands-on tasks.
- An open systems perspective, understanding how each cog in the wheel affects other users, and then conveying those concepts to staff members.
- A clear understanding of how operational efficiencies are gained through process observation, analysis and procedure development.
- Management of operations and workflows that support a fast-paced work environment.
- Highly developed customer service skills, applied to both internal and external customers.
- A proactive approach to problem solving and time management.
- Highly developed leadership skills, especially in the arena of motivating staff toward a common goal, addressing challenges, identifying opportunities and acting as an essential team player.
- Strong written and oral communication skills, including public speaking.
- Familiarity with the housing and real estate industry a plus.

**Customer Service** – Works with the NeighborWorks® Community Partners team to provide first-class customer support to internal and external stakeholders. Provides timely, accurate follow up and communication.

**Strong Organizational Skills** – Possesses excellent time management and organizational skills, with the ability to multitask, prioritize and work under pressure within a fast-paced environment.

**Strong Technical Skills** – Has experience using the Microsoft Office Suite of products (Word, Excel, Outlook, etc.) and the ability to learn and successfully navigate web-based customer management systems (Sales Force).

**Self-Starter & Team Player** – Takes initiative, possesses a strong sense of ownership, and is dedicated to ensuring a quality brand presence at all times. Inspires the trust and confidence of others to successfully collaborate on daily tasks and occasional projects while attaining the knowledge necessary to succeed in operational outcomes.

## Required Qualifications

- A minimum of an A.S. in Business Administration with a concentration in Management Information Systems (MIS), an A.S. in Computer Science or an A.S. in Information Technology.
- A minimum of four years of experience in an office operations environment, or a combination of higher education with relevant experience in both front office and back office operations.
- Experience with Salesforce or another customer relationship management (CRM) platform required. Basic Salesforce Admin experience preferred.
- Experience working with relational databases and management information systems expected.
- Experience with developing training and job aids.
- Experience delivering both classroom and hands on training preferred.
- Ability to travel between Niagara Falls, Buffalo and Rochester offices.

## What You Can Expect

- To be part of a dynamic team committed to the mission and brand of the organization and to high quality internal and external customer service.
- To work within a collaborative environment among individuals passionate about improving the quality of life for members of our community, utilizing unique industry knowledge, and employing up-to-date technological tools – all led by an experienced and proven leadership team.
- A competitive salary and benefits package.

## Application Instructions

Please send your cover letter and resume via email to the following address:

[jobs@nwcommunitypartners.org](mailto:jobs@nwcommunitypartners.org)

No phone calls or postal mail submissions, please.

NeighborWorks® Community Partners is an equal opportunity employer.