

CRM PLATFORM MANAGER

Current Incumbent: NA

Reports to: Dir, Data/App Mgmt

Status: Full-Time, Exempt

Updated: 2/11/2020

Department: DIS

Direct Reports: 0

Indirect Reports: 1-3

Eligible for Telework/CWW: Yes

SUMMARY OF POSITION:

The CRM Platform Manager oversees the day-to-day execution of system processes and data management in a Salesforce-centric production ecosystem. This role is responsible for ensuring the accuracy and integrity of a variety of data, as well as data input and output, technology management, and user training and support. In addition, the CRM Platform Manager implements policies for data entry, conducts data audits, and institutes data quality controls, policies, and procedures. Having developed expertise in the NAA application ecosystem, the Manager will collaborate with peers cross-functionally to ensure constituents receive excellent support and guidance. Comprehensive SOP documentation on processes, procedures, policies, and application configuration are key deliverables. The successful candidate can expect to spend approximately 60% of the work week managing and 40% doing.

The CRM Platform Manager will be evaluated on compliance with service level agreements, achieving team KPIs, accuracy of documentation, and ability to execute production tasks with accuracy and timeliness.

PRINCIPAL ACCOUNTABILITIES:

- Triage support requests and manage them to resolution
- Build library of procedure documentation for production schedule
- Manage CRM support cases
- Leverage CRM to creatively and effectively meet business needs
- Research and evaluate new technologies to be used as enhancements to existing landscape
- Manage data hygiene routines and identify/realize improvements
- Develop and enforce comprehensive quality control measures addressing both process and data interests
- Supervise and coach a small team of data and application specialists
- Evaluate and make recommendations regarding hiring, training, and other staff changes
- Perform other duties as assigned

SUPERVISORY RESPONSIBILITIES:

This position has no supervisory responsibilities.

TRAVEL:

Little travel is expected for this position. If any, travel would be local during the business day.

REQUIRED EDUCATION AND EXPERIENCE:

- 2-4 years in a supervisory role in a systems management capacity
- 3+ years' experience working with a cloud-based hosted system
- Salesforce Administrator certification (SCA)

- Salesforce production experience

PREFERRED EDUCATION AND EXPERIENCE:

- AMS (esp Nimble) experience
- Salesforce proficiency specifically Sales Cloud, Service Cloud, and Communities
- Salesforce Advanced Administrator certification

PHYSICAL DEMANDS:

While performing the duties of the job, the employee is regularly required to sit, use hands to finger, handle or feel objects, tools or controls; reach with hands and arms. The employee may occasionally lift up to 20 pounds.

WORK ENVIRONMENT:

Work is regularly performed in a professional office environment and routinely uses standard office equipment. The physical demands and work environment described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

This job description has been approved by all levels of management:

Manager _____

HR _____

Employee's signature below constitutes employee's understanding of the requirement, essential function and duties of the position.

Employee _____ Date _____

Please send resumes, cover letter and salary requirement to Resumes@naahq.org. No phone calls, please.
EOE M/F/H/V