**JOB DESCRIPTION**

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| **JOB TITLE:** | **Salesforce Administrator** |
| **GRADE:** | **5** |
| **REPORTING TO:** | **Core Systems Manager** |
| **THEME/PRODUCT:** | **Connecting Data** |

**ROLE SUMMARY**

The Salesforce Administrator ensures the smooth operation, optimisation, and integrity of the Salesforce platform. This role manages system configuration, user access, data quality, and security while providing responsive support and training to enhance user capability.

Working closely with technical teams, the Salesforce Administrator contributes to deployments, testing, and continuous improvements, ensuring Salesforce processes and enhancements align with business needs. Combining technical expertise with strong problem-solving and communication skills, the role enables the organisation to fully leverage Salesforce as a strategic platform for efficiency, productivity, and collaboration.

**MAIN DUTIES & RESPONSIBILITIES**

**Salesforce Platform Management & Configuration**
- Manage Salesforce configurations, including user roles, profiles, permissions, workflow rules, validation rules, and security settings to safeguard data and maintain system integrity.
- Develop an understanding of system architecture and interface documentation, ensuring accuracy and currency.
- Identify opportunities to optimise processes, leveraging Salesforce capabilities and new feature releases to improve colleague efficiency and effectiveness.

**User Support, Training & Engagement**
- Act as a primary point of contact for Salesforce users, providing troubleshooting, guidance, and tailored support.

Salesforce Administrator TOM

- Deliver training and promote adoption of Salesforce features, ensuring users understand and confidently use the platform.
- Help users navigate Salesforce features, resolve basic issues, and provide general technical support.
- Act as a Systems Champion, promoting proactive ICT use to improve staff and customer experience.
- Gather user feedback and suggest improvements to enhance usability and system performance.

**Technical Support, Problem Solving & Continuous Improvement**
- Provide product support to business users, investigating Salesforce errors, data discrepancies, and system problems, often requiring complex decision-making.
- Work closely with the BI Data Team, system administrators, and external Salesforce partners to escalate and resolve complex technical issues.
- Collaborate with Salesforce Developers and technical squads to support deployments and perform testing on new features, updates, and customisations.
- Stay up to date with Salesforce developments through continuous learning.

**Collaboration, Stakeholder Engagement & Cross-Organisation Working**
- Build strong relationships with teams across the organisation to understand business needs and translate them into effective Salesforce solutions.
- Communicate system changes clearly to ensure buy-in and successful adoption.
- Work closely with managers, end users, third parties, and other Housing Associations implementing Salesforce to share knowledge and best practice.
- Liaise with Salesforce where required to support system development or issue resolution.
- Attend Salesforce events and actively engage with Salesforce community forums and groups.

**Strategic & Operational Support**
- Support the Core Systems Manager in developing and implementing strategic and operational plans for Salesforce.

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- Assist in ensuring procedures and policies are in place and followed for effective platform development and user support.
- Contribute to the ongoing development of believe housing's Salesforce platform in alignment with the ICT Strategy, identifying innovative and achievable solutions.

**General**
- Managing health and safety issues in your area of responsibility in line with the relevant section(s) of the relevant Health and Safety Policy.
- Complying with business confidentiality and information security policies, in line with GDPR and relevant legislation.
- Live believe housing's values and behaviours, doing the right thing for our customers, our business, and our people.
- To deliver financially viable and economically effective services, seeking to gain maximum benefit from the use of resources and increasing social value.
- Your duties may vary from time to time within the broad remit of your role and grade. You are required to undertake any such reasonable and appropriate duties.

**PERSON SPECIFICATION**

| Essential & Desirable Criteria | Method of Assessment |
|---|---|
| **Qualifications** ||
| • Salesforce Administrator Certification (ADM201) or similar. (E)<br>• Salesforce Advanced Administrator Certification. (D) | • Application Form<br>• Pre-employment checks |
| **Experience** ||
| • Previous experience in Salesforce integrations or working alongside Salesforce Developers (E)<br>• Proven experience working as a Salesforce Administrator, with a strong grasp of Salesforce functionality, configurations, and user management.(E)<br>• Proficiency in troubleshooting and resolving technical issues, supporting deployment activities, and ensuring successful testing of Salesforce updates and integrations. (E)<br>• Experience with agile methodologies and Salesforce platform upgrades.(E)<br>• Experience working as a Salesforce Platform Developer. (D) | • Application Form<br>• Interview |
| **Knowledge** ||
| • Working knowledge of Salesforce reporting and dashboard creation to support business intelligence. (D)<br>• Comprehensive knowledge of user roles, profiles, permission sets, and security controls within Salesforce. (E)<br>• Knowledge of Mulesoft and Agentforce AI. (D) | • Application Form<br>• Interview |
| **Skills** ||
| **Deliver, improve & problem solve**<br>  • Detail-focused and analytical, identifying opportunities to optimise processes, data quality, and system performance. (E)<br>  • Uses insights to recommend and implement improvements that enhance efficiency and user experience. (E)<br>  • Applies structured problem-solving to diagnose issues and deliver effective solutions. (E)<br><br>**Communication, Collaborate & Stakeholder Engagement**<br>• Proactive communicator who builds strong relationships and promotes productive cross-team collaboration. (E)<br>• Excellent communication and training skills, with the ability to collaborate effectively across technical teams and business stakeholders. (E) | • Application Form<br>• Interview |

Salesforce Administrator TOM

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| • Translates complex requirements into clear, actionable tasks and user-friendly guidance. (E)<br>• Engages stakeholders effectively to align expectations and ensure smooth delivery of change. (E)<br><br>**User Enablement, Coaching & Customer Focus**<br>• Empowers users with intuitive design, training, and support that enhances confidence and capability. (E)<br>• Coaches colleagues in adopting new ways of working and embracing Salesforce functionality. (E)<br>• Advocates for user-centred design, ensuring solutions meet customer and business needs. (E)<br><br>**Technical Expertise, Governance & Platform Management**<br>    • Skilled in core Salesforce configuration including Flows, validation rules, permissions, page layouts, and reporting. (E)<br>    • Applies good governance through documentation, release management, data integrity, and secure change control. (E)<br>    • Understands business processes, platform security, data management, and the wider Salesforce ecosystem. (E)<br>    • Passionate about empowering users to achieve their goals through intuitive, effective Salesforce utilisation. (E) | |
| **Behaviours** | |
| • **Care about the basics** – you ensure best practice is in place, and use resources effectively<br>• **Work well together** – you give context and clarity, join up how we approach our work, and break down silos<br>• **Achieve great results** – you celebrate success, set clear expectations and provide opportunities to learn from the things that go wrong.<br>• **Keep improving** – you promote meaningful change, create opportunities for improvement and make it happen<br>• **Be at our best** – you lead with integrity<br>• **Make a positive difference** – you actively collaborate, create effective partnerships and encourage autonomy | • Interview |