



Recruitment information pack

Salesforce Administrator

September 2019

Welcome

Thank you for your interest in applying to the School for Social Entrepreneurs. We have put together some information below which we hope will help you understand the organisation and the role. For more information please visit www.the-sse.org.

About the School for Social Entrepreneurs

We can't fix issues like poverty, climate change and ill-health alone. That's why the School for Social Entrepreneurs exists. SSE helps 1,000 people a year develop the skills, strengths and networks they need to tackle society's biggest problems. It runs courses that equip people to start, scale and strengthen organisations that make a positive difference. But it is not a traditional school. Learning with SSE is inspiring, action-based and accessible. SSE supports people in others ways too, such as funding and mentoring. Lord Michael Young founded SSE as a charity in 1997, and it's grown to a network of schools across the UK, Canada and India. Together, SSE is changing lives and transforming communities.

SSE is currently delivering a UK-wide five-year learning programme in 12 UK locations with the support of Lloyds Banking Group and Big Lottery Fund, and a national learning programme for community businesses in partnership with Power to Change. SSE also has strategic partnerships with corporates such as PwC, Linklaters, RSA Group and others as well as funding partnerships with trusts and foundations including Lloyds Bank Foundation. We also generate earned income through selling places on our short courses and workshops.

SSE is a vibrant organisation; we work entrepreneurially and are committed to providing quality learning opportunities for social entrepreneurs, community businesses and social sector leaders. Working here is engaging, exciting and demanding. If you are someone who enjoys creating solutions and contributing your ideas you'll enjoy how we work.

This role will be based within our central London offices at London Bridge, but will involve working with our network of schools across the UK and may require occasional visits. In London we are a busy, friendly and dynamic team with 35 staff based onsite.

About the role

Over the past 12 months, SSE has initiated major updates to our Salesforce CRM system. Phase 1 of the Salesforce build will go live in Autumn 2019, and will offer significant improvements to our operations. As Phase 1 beds in, we will begin scoping requirements for Phase 2. To ensure that Salesforce continues to meet our needs as SSE grows and develops we anticipate three deployments per annum on an ongoing basis.

SSE is also in the process of redesigning the architecture for our wider business intelligence data. These datasets sit outside of Salesforce, but need to be connected to it. While this role is primarily Salesforce-focused, the post holder will also be responsible for administering IT systems which hold wider business intelligence data.

The role will support Salesforce and data system development and evolution, alongside administering the systems as built to maximise efficiency and ensure data quality. It will also have a major focus on ensuring all our CRM and data users are happy, confident and productive through a combination of structured training and responding to user issues that arise on an ad hoc basis.

Our CRM re-development and data architecture design represents the beginning of a significant period of investment in our wider operating model and, in particular, SSE's IT and digital capability. We will soon commence the development of an overarching IT and digital strategy for SSE. This will be built around our existing investment in Salesforce but will go further to address our aspirations in areas such as collaborative and remote working, e-learning, analytics and social networking. It is an exciting time to join SSE. Your role will be crucial in supporting our transformation objective and powering our operations and people to work more efficiently.

Purpose

The primary purpose of this role is to:

- Administer the CRM on an ongoing basis, including leading on all integrated applications.
- Build the capacity of colleagues to use the CRM confidently and well.
- Support effective scoping and implementation of current and planned Salesforce updates, and subsequent regular releases.
- Support data management and business intelligence across SSE.

You will succeed in the role if you have a high degree of technical competency alongside excellent people skills; you will not only understand IT systems but also their implications and impact for different staff, and be able to bring colleagues on a journey as both the IT systems and wider organisation evolve over time.

Job description

Key responsibilities

Administering the CRM System

1. Undertake routine Salesforce administration tasks to ensure efficiency and promote data quality.
2. Use Salesforce security features to ensure the correct people can access the correct data at the correct time.

3. Set up and administer CRM document / email templates and reports.
4. Ensure that wider Salesforce releases and updates do not compromise or impact SSE's own CRM system.
5. Evaluate Salesforce releases for new and improved functionality which may be relevant for SSE.
6. Ensure SSE is following best practice and being smart in the way it uses Salesforce.
7. Ensure SSE's use of Salesforce is compliant with legal requirements, which includes but is not limited to GDPR.
8. If/when appropriate, manage our relationship with Salesforce as a supplier.
9. Manage third party app integrations, including setting up DocuSign templates, integrating forms on 123Formbuilder and setting up Zaps to connect various applications using Zapier.

Staff engagement and capacity building

1. Use change management principles to encourage the use of Salesforce across SSE, including identifying and training Salesforce champions.
2. Provide training and resources to colleagues as required, including 'how to' manuals, videos and induction support.
3. Solve Salesforce user problems and issues in a responsive manner.
4. Support and train selected staff with delegated admin or additional profile and privacy settings.
5. Monitor the quantity and quality of staff engagements, and the effective use of Salesforce as a CRM.
6. Share best practice within the London office and across the wider network.

Developing the CRM system

1. Collate and prioritise requirements and feedback from internal stakeholders relating to Salesforce functionality.
2. Scope and lead on updates to the Salesforce system including building custom object fields, and creating flows and processes.
3. Support on identifying third party applications that can meet business objectives. Integrate and roll out those apps where possible, including managing relevant relationships with external providers as appropriate.
4. Lead on coordinating User Acceptance Testing for all new or updated Salesforce functionality.
5. Lead on identifying, prioritising and solving bugs and issues, including identifying when external support is required.
6. Working with the Director of Finance and Resources, support integration of Salesforce with other technology in use at SSE.
7. Work with colleagues across all functions of SSE to identify opportunities to streamline systems and processes and increase efficiency through use of Salesforce and related third party apps.
8. Ongoing documentation of changes, process maps and deployments to ensure good governance and in line with best practice.

Data management and business intelligence

1. Managing data, reporting and analysis systems, including maintaining data flows to/from Salesforce and other systems, and managing users.
2. Maintaining data integrity and quality standards across various organisational datasets.
3. Undertaking ad-hoc analysis on a range of organisational datasets.
4. Supporting colleagues across SSE to develop reports and dashboards.
5. Providing advice and expertise on organisational data to colleagues across SSE.

Other

1. Support development of IT and digital strategy, connecting Salesforce to wider IT infrastructure.
2. Carry out other tasks that are within the scope, scale, spirit and purpose of the role.

Key relationships

You will report to the Director of Finance and Resources. During Phase 1 and 2 of the Salesforce rebuild, you will work closely with the Salesforce Project Manager, who will be leading on the development of Phase 2, which will likely include a student and fellows platform and full end to end integration with programme and finance applications. You will also work closely with the Monitoring and Evaluation Manager on reporting around impact performance.

Strong relationships with staff across the SSE Central team and the SSE network of schools will be key to this role. You will also need to foster good relationships with external developers and third party suppliers.

Person specification

Essential

- Certified Salesforce Administrator
- Experience of Salesforce implementation
- Excellent attention to detail and a methodical approach to work
- Creative problem-solving skills. Able to research solutions and solve issues independently
- Able to explain IT problems and solutions simply, and in plain English.
- Organisational and project management skills, with experience of prioritising a number of concurrent work streams and delivering to deadlines
- Relationship management and communication skills, with the ability to relate to and support people at all levels and with varying Salesforce skills and competencies

Desirable

- Experience with Business Intelligence systems and data analysis (knowledge of SQL and other languages such as Python, DAX or VBA would be an advantage, but is not a pre-requisite)
- Experience developing reports and dashboards
- Experience developing or delivering staff training and materials
- Familiar with the social sector, and/or understanding of working within a charity or social enterprise
- Experience with change management
- Understanding of agile project management

Personal attributes

- Self-starter, able to work with limited guidance and comfortable making decisions.
- Hands on, someone who is willing to get stuck in and contribute directly.
- Highly organised, able to prioritise a varied and fast paced workload and deliver to deadlines.
- Reliable, someone who will take personal responsibility for getting the job done well.
- Collaborative, someone who listens and responds to others' views at all levels within the organisation and enjoys working as part of a team.
- Solutions focussed, resourceful and flexible.
- Friendly, with a positive attitude.

Key details

Salary:	Starting salary £32,061 - £35,032 pro rata (subject to skills and experience) + 5% pension
Hours:	28 hours per week, typical office hours 9am-5am or 10am-6pm.
Annual leave:	25 days pro-rata
Contract:	Permanent
Flexibility:	Occasional early morning / evening work and travel within the UK may be needed, especially where support is required by the SSE Network
Location:	London Bridge, SE1

To apply

To apply please send your CV and a covering letter (both of which should be no more than two sides of A4) answering the following questions:

- 1. What attracted you to apply for this role?**
- 2. Why would you be an excellent Salesforce Administrator for SSE?**

Please use no more than 800 words total to answer these questions.

Please send your application to recruitment@sse.org.uk by midday on 7th October and title your email 'Salesforce Administrator Application'.

First round interviews will be held before or during the week commencing 14th October. Depending on the outcomes of the first interviews we may hold second interviews the week commencing 21st October.

Unfortunately due to our limited capacity we are unable to provide feedback to candidates not shortlisted for interview.

SSE is committed to eliminating discrimination and actively encouraging diversity amongst our workforce by developing a staff team that mirrors the rich diversity found in our student population. We will not discriminate with reference to age, gender, sexual orientation, race, colour, religion, marital status or disability.

Job Applicant Privacy Notice

As part of any recruitment process, SSE collects and processes personal data relating to job applicants. We are committed to being transparent about how it collects and uses that data and to meeting its data protection obligations.

What information does SSE collect?

SSE collects a range of information about you. This includes:

- your name, address and contact details, including email address and telephone number;
- details of your qualifications, skills, experience and employment history;
- whether or not you have a disability for which the organisation needs to make reasonable adjustments during the recruitment process; and
- information about your entitlement to work in the UK;

SSE collects this information in a variety of ways. For example, data might be contained in application forms, CVs or resumes, obtained from your passport or other identity documents, or collected through interviews or other forms of assessment.

SSE will also collect personal data about you from third parties, such as references supplied by former employers. We will seek information from third parties only once a job offer to you has been made and will inform you that it is doing so.

Data will be stored in a range of different places, including on your application record, in HR management systems and on other IT systems (including email).

Why does the organisation process personal data?

SSE needs to process data to take steps at your request prior to entering into a contract with you. We may also need to process your data to enter into a contract with you.

In some cases, SSE needs to process data to ensure that it is complying with its legal obligations. For example, we are required to check a successful applicant's eligibility to work in the UK before employment starts.

SSE has a legitimate interest in processing personal data during the recruitment process and for keeping records of the process. Processing data from job

applicants allows us to manage the recruitment process, assess and confirm a candidate's suitability for employment, and decide to whom to offer a job. SSE may also need to process data from job applicants to respond to and defend against legal claims.

For some roles, SSE is obliged to seek information about criminal convictions and offences. Where the organisation seeks this information, it does so because it is necessary for us to carry out our obligations and exercise specific rights in relation to employment.

SSE will not use your data for any purpose other than the recruitment exercise for which you have applied.

Who has access to data?

Your information will be shared internally for the purposes of the recruitment exercise. This includes members of the HR and recruitment team and interviewers involved in the recruitment process.

We will not share your data with third parties, unless your application for employment is successful and it makes you an offer of employment. SSE will then share your data with former employers to obtain references for you.

SSE will not transfer your data outside the European Economic Area.

How does SSE protect data?

SSE takes the security of your data seriously. It has internal policies and controls in place to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by our employees in the proper performance of their duties.

For how long does SSE keep data?

If your application for employment is unsuccessful, SSE will hold your data on file for 12 months after the end of the relevant recruitment process. At the end of that period your data is deleted or destroyed.

If your application for employment is successful, personal data gathered during the recruitment process will be transferred to your personnel file and retained during your employment. The periods for which your data will be held will be provided to you in a new privacy notice.

Your rights

As a data subject, you have a number of rights. You can:

- access and obtain a copy of your data on request;
- require SSE to change incorrect or incomplete data;
- require SSE to delete or stop processing your data, for example where the data is no longer necessary for the purposes of processing;
- object to the processing of your data where the organisation is relying on its legitimate interests as the legal ground for processing; and
- ask SSE to stop processing data for a period if data is inaccurate or there is a dispute about whether or not your interests override SSE's legitimate grounds for processing data.

If you would like to exercise any of these rights, please contact office@sse.org.uk. If you believe that SSE has not complied with your data protection rights, you can complain to the Information Commissioner.

What if you do not provide personal data?

You are under no statutory or contractual obligation to provide data to SSE during the recruitment process. However, if you do not provide the information, we may not be able to process your application properly or at all.

Data controller: School for Social Entrepreneurs, 2nd Floor, 139 Tooley Street, London SE1 2HZ

Reg. Charity in England & Wales (1085465)

**Head of Finance (HR) Data Protection Contact: Pauline O'Connor
pauline.oconnor@sse.org.uk 020 7089 9120**