JOB TITLE:	CRM Administrator & Analyst
DEPARTMENT:	Engagement
JOB HOLDER:	New Position
REPORTS TO:	CRM Manager
JOB STATUS:	1.0 FTE, Permanent

JOB PURPOSE

Reporting to the CRM Manager, the CRM Administrator & Analyst plays an important role to administer MSF's CRM platform (Salesforce) to ensure it is used effectively within MSF's context. The role collaborates with stakeholders to gather business requirements, help translate them into technical solutions, and provide training and support for users. The role also ensures data integrity, streamlining processes, and driving improvements to enable the organisation to effectively fulfill its mission.
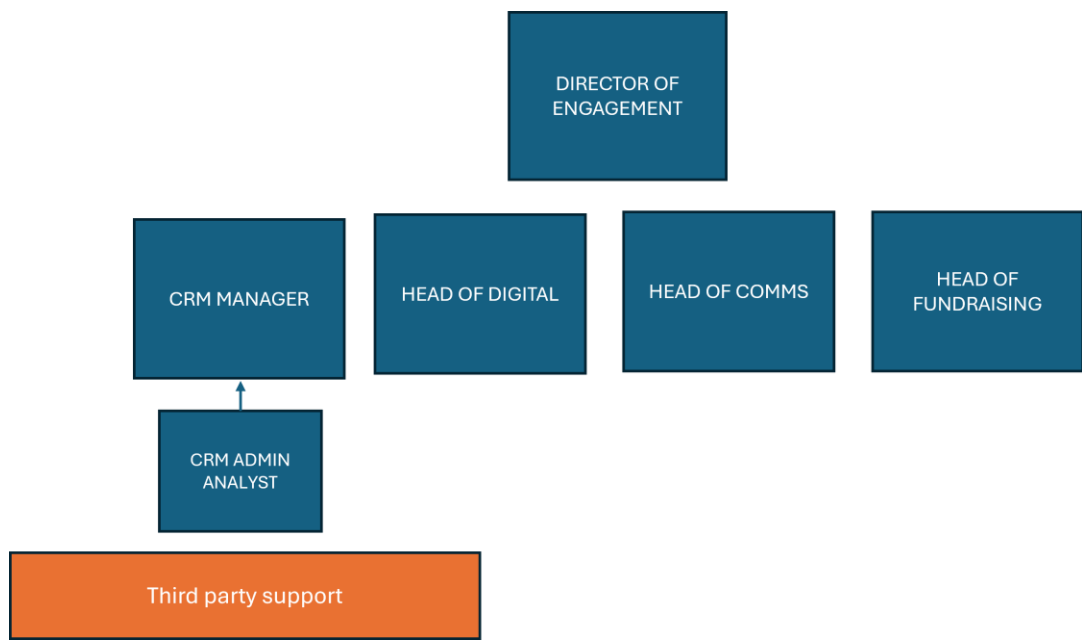
DIMENSIONS

Asset: Salesforce CRM

Financial: N/A

Staff: N/A

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ORGANISATIONAL STRUCTURE

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                        │   DIRECTOR OF   │
                        │   ENGAGEMENT    │
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│  CRM    │  │   HEAD OF   │ │  HEAD OF   │ │   HEAD OF   │
│ MANAGER │  │   DIGITAL   │ │   COMMS    │ │ FUNDRAISING │
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┌─────────┐
│  CRM    │
│  ADMIN  │
│ ANALYST │
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│  Third party support │
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Other key stakeholders and supporters:

- Head of Data and Analytics + Team
- Fundraising Team
- IT
- Director of Business Operations + Team
- International and Domestic HR

CONTEXT

MSF has recently launched a new CRM system, marking a pivotal step in enhancing our fundraising, donor engagement, and operational capabilities. The CRM Administrator & Analyst will be essential in maintaining, optimising, and developing this system to ensure its stability, scalability, and alignment with organisational goals. This role combines system administration with developer operations, encompassing the design, implementation, and management of integrations, workflows, and custom solutions to enhance CRM functionality. By ensuring data accuracy, automating processes, and delivering actionable insights, the CRM Administrator & Analyst will streamline operations, empower data-driven decision-making, and drive innovation. Additionally, this role will support troubleshooting, user training, and ongoing system updates to maximise the system's impact.

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ACCOUNTABILITIES

1. User Management (Security and Access)
- o Manage user accounts, roles, and permissions to ensure secure and appropriate access.
- o Regularly audit user access to align with organisational policies and compliance standards.
- o Address and resolve user access issues in a timely manner.

2. System Configuration (Declarative)
- o Configure system settings, custom fields, workflows, and automation using declarative tools.
- o Optimise system performance and user experience through configurations.
- o Implement configuration changes aligned with evolving organisational needs.

3. Report and Dashboard Creation/Management
- o Design and manage reports and dashboards to provide actionable insights.
- o Collaborate with stakeholders to ensure reports align with their needs.
- o Regularly review and update dashboards for relevance and accuracy.

4. Requirements Gathering
- o Work closely with stakeholders to collect and document CRM requirements.
- o Translate organisational needs into technical requirements.
- o Prioritise and validate requirements based on business goals.

5. User Story Development
- o Create detailed user stories with clear acceptance criteria.
- o Collaborate with development and testing teams to refine user stories.
- o Align user stories with overall project goals and timelines.

6. User Training and Documentation
- o Develop and deliver comprehensive user training programs.

KEY PERFORMANCE INDICATORS

- Complete all configuration changes within agreed-upon timelines
- Delivery of accurate report and dashboard design
- Deliver training to 100% of target users before new feature rollouts.
- Achieve a 90% satisfaction rate from training participants.
- Update user documentation within 5 business days of system changes.
- Execute UAT and regression testing for 100% of major releases before deployment.
- Resolve 90% of incidents within the agreed SLA
- Conduct root cause analysis for 100% of critical incidents.

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- o Create and maintain user guides, FAQs, and training documentation.
- o Conduct training sessions for new features and updates.

7. UAT (User Acceptance Testing) and Regression Testing

- o Develop and execute UAT and regression test plans.
- o Collaborate with stakeholders to validate that the system meets their needs.
- o Identify and resolve bugs or inconsistencies discovered during testing.

8. Incident Handling

- o Respond promptly to system incidents and resolve issues efficiently.
- o Log and track incidents in the ticketing system, ensuring clear documentation.
- o Perform root cause analysis to prevent recurrence.

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CHALLENGE & CREATIVITY / DECISION-MAKING

Optimising System Functionality: Balancing the need for creative solutions with technical constraints to continually improve the CRM system's performance and alignment with MSF's strategic goals.

Translating Stakeholder Requirements: Effectively gathering and prioritising business needs from diverse teams, ensuring that CRM configurations and customisations meet organisational objectives while maintaining system scalability.

Driving User Adoption and Training: Developing and executing training programs that cater to varying levels of user expertise, ensuring the effective adoption of new features and maintaining high user satisfaction.

Ensuring Data Integrity and Process Improvements: Making decisions on how to streamline CRM processes and ensure data accuracy, while troubleshooting and resolving incidents efficiently to prevent recurring issues

KNOWLEDGE, SKILLS & EXPERIENCE

Essential

- Minimum 3+ years' experience working with the Salesforce platform in an administrative capacity
- Demonstrated experience working as a business analyst (desirable in an NFP context), with a solid understanding of requirements gathering and user story creation
- Demonstrated experience delivering end user training and documentation
- Demonstrated experience with user acceptance and regression testing
- Thorough understanding of project management methodologies
- Excellent interpersonal, communication and organisational skills

Highly regarded

- Tertiary qualification(s) in technology or business-related disciple
- Salesforce Certifications (e.g. administrator, app developer, platform developer)
- Salesforce NPSP experience
- Experience working with Marketing Automation and digital channels
- Experience working in a NFP organisation
- Business Analysis / Project management qualifications
- Knowledge of Agile, ITIL and DevOps

DATE:	
Signed: (Job Holder)	
Signed: (Manager / Director)	

COMPETENCIES

Adaptability: Ability to adjust to changing priorities and requirements in a dynamic environment.

Collaboration: Work effectively with cross-functional teams to achieve common goals.

Problem-Solving: Identify challenges and develop creative solutions to optimise CRM performance.

Attention to Detail: Ensure accuracy and completeness of CRM data and processes.

Strategic Thinking: Ability to align CRM strategies with MSFA's objectives and mission.

Continuous Learning: Stay updated on Salesforce developments and best practices to enhance CRM operations.

Communication: Effectively convey ideas, instructions, and feedback to stakeholders at all levels.

Lead by example. In MSF- Australia, the following five values form the foundations of our culture: **Transparency, Respect**, **Understanding of Diversity**, **Stepping In** and **CollaboraTion.** As a leader, your behaviours and actions are expected to consistently reinforce these values

DATE:	
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