



# WESTMONT

## CRM and Form Administrator

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### Technology Services

#### **Position Summary:**

Serves as a key member of a team that analyzes and enhances the business processes of Advancement, Admissions, and other departments by designing and building solutions to impact inefficiencies and create innovative service models. Westmont's customer relationship management (CRM) tool and primary business platform is Salesforce. While this individual needs to be able to move quickly to solve any technical problems surfaced by CRM users, strategic energy should be directed toward identifying opportunities for business process improvement. Form management, given its central role in serving external and internal constituencies, and its tight integration with Salesforce, is also managed by this role. This leader manages the Sr. Data Processor for Transactions and supports the Business Analyst and Application Teams, aligning them toward key strategic objectives and supporting their operational needs. Works in partnership with Marketing Cloud Administrator and Communications Analyst to ensure smooth data flows from CRM to email marketing platforms.

**Qualifications:** Requires an Associate's or Bachelor's degree in Computer Science, Communication, or related degree, 2-3 years of previous work experience in a similar position, and at least 1 year experience as Salesforce administrator required. Salesforce Administrator certification required. Salesforce Advanced Administrator and Form Assembly experience strongly preferred. Also requires high proficiency in Excel, Access, SQL, and other statistical analysis tools as well as an analytical mindset, data interpretation skills, and programming ability. Java/Apex programming skills highly preferred. Must have strong communication skills, attention to detail, creativity, and be persistent, self-motivated in applying research and analytical abilities to technical solution-building to support the college's mission, possess strong understanding of customer relationship management, data mining, and predictive modeling tools and techniques. Must be comfortable managing multiple projects while working under tight deadlines and able to maintain excellent documentation. Requires personal affirmation of the Christian mission of Westmont College and the Community Life Statement and adherence to its behavioral expectations.

#### **Responsibilities:**

Employ problem-solving techniques and tools to analyze and improve college revenue performance and college program efficiencies through conversation with stakeholders followed by design, implementation, and training on technical solutions.

- System Administration and Architecture
  - With the Director of CRM and Data Services, assist in administering the college's CRM system, Salesforce, including sharing data across departments and systems, building reports, and working towards fully utilizing the college's current applications.
  - With the Director of CRM and Data Services, assist in administering the college's form system, Form Assembly. Host regular training sessions with staff to encourage adoption.
  - Assist the Director of CRM and Data Services with training staff and building CRM reports on an ad hoc basis.

- Lead, identify, design, and implement information systems.
- Design and implement operational reports to track revenue goals, program success and larger data trends.
- Administer form building solution and build forms as necessary to capture participant data
- **Strategic Data Services**
  - Work with other OCA, Admissions, and college department staff to identify operational questions and issues that can be answered or addressed with technical solutions and data.
  - Analyze data to identify and recommend business solutions and optimize business processes.
  - Lead projects geared at optimizing business processes and ensuring reliability.
  - Consistently meet with stakeholders within and outside OCA to ensure employees have access to data and systems that will allow them to work more effectively. This will include building technical solutions to meet their needs and involve the judicious use of declarative development and code-level development in Salesforce.
- **Manage Sr. Data Processor, Transactions and support Business Analyst team.**
  - Motivate, supervise and evaluate the performance of transaction team.
  - Ensure financial transaction data is appropriately and effectively distributed to various offices at Westmont, including the Business Office.
  - Discover and research data inconsistencies and work with the Analysts and Sr. Data Processors to determine appropriate steps.
- **Expectations for workplace demeanor include but are not limited to: working collaboratively and harmoniously with co-workers, vendors and others by sharing ideas and resources willingly, constructively and positively; listening to and objectively and respectfully considering the ideas and perspectives of others; readily admitting and correcting personal mistakes; meeting commitments; keeping your supervisor and others who may be affected informed about work progress; addressing problems willingly and constructively to discover practical and lasting solutions acceptable to all parties; working promptly toward reconciliation and forgiveness during conflict; respecting the diversity of our community in words and deeds; ability to successfully manage conflicting priorities and deadlines.. Westmont expects employees to avail themselves wherever necessary, demonstrating flexibility and openness to new requests and responsibilities in order to foster an environment of collaboration.**
- **Other duties as assigned.**

Supervises: Business and Systems Analyst and Sr. Data Processor, Transaction Specialist

**Reports to:** Director of CRM and Data Services