HIGHGROUND® ADVISORS

Protect. Strengthen. Grow.®

JOB TITLE: SALESFORCE ADMINISTRATOR
DEPARTMENT: CLIENT SYSTEMS
REPORTS TO: DIRECTOR OF CLIENT SYSTEMS
CLASSIFICATION: EXEMPT
LOCATION: DALLAS, TEXAS

Position will be primarily responsible for producing all client reporting, administering the information systems directly supporting client accounts and coordinating internal and external efforts for related efficiencies, enhancements, updates, development and testing.

WHO YOU ARE

As the Salesforce Administrator, you are a self-directed, highly organized individual with the demonstrated ability to work in a fast-paced, flexible environment. You lean into new technology to maximize efficiency. Being a master multi-tasker, you can manage multiple assignments simultaneously. You collaborate and partner with stakeholders to translate business needs into working solutions. Strong listening, written and verbal communication skills are just a few of your core strengths. Also, you are open-minded, inquisitive and fluid in adapting to and embracing change, making you the ideal collaborative team player. Utilizing your problem-solving and analytical skills, you quickly formulate solutions with little supervision. To you, the details matter.

Essential duties and responsibilities
YOU ARE EXCELLENT AT:

- Administering and supporting the Salesforce platform and related software (all use cases of Salesforce, training, enhancements, integrations, flows, internal support, budgeting), including but not limited to users, profiles, training, workspaces and integrations for the following applications:
    - Candid, Chargent, Docusign, MuleSoft, Conga, Laserfiche, Mineralware, Pardot, Own Backup, Salesforce Shield and Authorize.net
- Managing Salesforce users, roles, profiles, permission sets, access controls, sharing rules, page layouts, record types, fields, objects, validation rules and audit of daily activity
- Providing Salesforce support, troubleshooting, training, and documentation for end users and business stakeholders
- Configuring and maintaining Salesforce solutions including custom objects, fields, page layouts, record types, validation rules, flows, reports and dashboards as well as designing Dynamic Forms to improve user experience and streamline data capture
- Building and maintaining Salesforce automation using Flow, assignment rules, approval processes and other declarative tools
- Supporting Salesforce releases, sandbox testing, deployment planning/coordination, change management and post-release validation and documentation
- Partnering with internal stakeholders to gather requirements and deliver scalable Salesforce solutions that improve efficiency, visibility and user adoption
- Maintaining a current knowledge of Salesforce functionality and proactively recommending improvements to platform design, automation, reporting and user experience
- Assisting with the management of the trust accounting system (InnoTrust/Innovest) partner relationship, including enhancement development and testing, release testing, APIs, and support for internal and user access while maintaining a focus on items prioritized by HighGround

- Coordinating the implementation of improvements to the online client portal (Innovue) to increase functionality for clients
- Serving as the back-up liaison with client reporting partners (Greenhill and RR Donnelly) to resolve issues and implement enhancements
- Assisting with generating, reviewing and posting monthly, quarterly and annual client statements
    - Participating in all aspects, including documentation, production, distribution, notification and training
    - Assisting with trust management administration, testing, training and documentation
    - Helping draft and send both internal and client communications regarding statement and report status
- Managing the donor-advised fund (DAF) experience websites, including but not limited to users, profiles and integration while supporting back-end functionality and improvements to enhance the user experience
- Collaborating with internal teams, vendors, consultants and developers on integrations, custom development and platform enhancements
- Designing and maintaining reports and dashboards for pipeline visibility, marketing performance, customer activity, service operations and executive reporting
- Monitoring and improving data quality through duplicate management, validation rules, data cleanup, imports, naming standards and governance processes
- Creating, coordinating, implementing and supporting the roadmap for API Implementations between client software/systems applications to automate data flows for all teams
- Serving as a liaison with all teams to collaboratively identify areas for increased efficiency and effectiveness in the use of data and technology. Developing solutions using the integration of systems and processes in the areas identified for improvement
- Identifying and implementing efficiencies across processes within and between client systems
- Providing user training and support to new and existing staff for client software/systems
- Assisting with team and company-wide projects and initiatives
- Assuming responsibility for related duties as required and assigned

Competencies and qualifications

YOU HAVE:

- Bachelor's degree in information systems, business administration, computer science, another related field or equivalent practical experience
- Certified Salesforce Administrator or the ability to obtain certification within 6 months
- Minimum 4 years of experience, nonprofit experience a plus
- Strong hands-on experience with Salesforce configuration, including objects, fields, security models, reporting, dashboards and automation and process design (APEX and Salesforce Flows)
- Exposure to hybrid Salesforce Admin/Developer responsibilities
- Experience with SOQL, reporting, data imports/exports and integrations
- Familiarity with data management tools such as Data Loader
- Experience with Lightning Web Components, REST APIs, MuleSoft, Visualforce or Lightning Web Components
- Experience with enterprise integration (MuleSoft preferred)
- Ability to create clear, effective user and technical documentation, including user manuals as well as documentation of business processes and procedures
- Ability to learn from senior team members/manager to serve clients effectively and demonstrate team cohesion
- Ability to maintain a high degree of ethical standards and complete confidentiality
- Exceptional and confident communicator and listener
- Excellent verbal, written and interpersonal communication skills

- Ability to multi-task and offer solutions to issues while engaging affected teams as needed
- Must be a self-starter with the ability to work well in a team environment

HighGround has a professional, open office environment
SALESFORCE ADMINISTRATOR WORKING CONDITIONS:

- Routinely uses standard office equipment such as computers, phones, multi-functional copiers and filing cabinets
- Usually sits to complete job functions, but may walk or stand for brief periods of time (access to sit-to-stand desks for optimal flexibility is provided)
- Must be able to lift up to 5 pounds
- Is required to have close vision, distance vision and the ability to adjust focus
- Is required to have the ability to lift files, open filing cabinets and bending or standing on a stool as necessary
- Is required to work onsite as scheduled with the potential to qualify to work from home two days a week and has little to no expected travel

The above statements are intended to describe the general nature and level of work being performed by the person(s) assigned to this job. They are not intended to be an exhaustive list of all duties, responsibilities and skills required of personnel so classified. Employees holding this position will be required to perform any other duties as requested by management, from time to time in its sole discretion. This updated job description supersedes prior descriptions for the same position. Management reserves the right to add or change duties at any time.

WHO WE ARE

Our vision is to Protect, Strengthen and Grow our nonprofit clients and charitably minded families. We believe there is no pursuit more important than this; because we believe the work we do, now and in the future, will not only shape our lives but will empower the many organizations that truly transform lives. This vision forms an authentic pathway to our mission—to be an innovative and vigilant caretaker of the funds and assets entrusted to us by the nonprofits and generous individuals we serve through effective asset management, gift planning strategies and account support services. It is the outcome we work towards together—to have a greater impact on the world and individual lives. We hope you will decide to join us on this incredible journey.

HighGround is committed to our brand promise and our core values. As such, we expect that you will strive to keep our clients at the center of everything you do, be honest, always remain professional, exhibit humility and think outside of the box as our founders did, who were pioneering and visionary when our journey began in 1930.

HighGround offers a comprehensive benefits package that includes a progressive medical plan, dental, vision, disability benefits, retirement plan and more but don't take our word for it, have a look at what other HighGrounders are saying and learn more about our benefits here: https://www.highgroundadvisors.org/careers.

If you are interested in becoming a part of the HighGround team, please email your resume and cover letter to HR@highgroundadvisors.org.