

CRM/Salesforce Manager

Job Title	CRM/Salesforce Manager
Reports To	Chief Operating Officer
Directly Supervises	N/A
Employment Status	Exempt/Full Time
Date	December 2, 2024
Benefits	CBST offers a comprehensive and competitive benefits package
Physical Requirements	Employee will need to sit for long periods of time for computer work.

About CBST:

Congregation Beit Simchat Torah is a spiritual home for people of all sexual orientations and gender identities. Passionate, provocative, and deeply Jewish, our community engages in spirited debate and activism: rejoicing in diversity, denouncing social injustice wherever it exists, and striving for civil rights for all people.

Job Summary:

The CRM/Salesforce Manager at CBST will oversee the administration and ongoing development of CBST's Salesforce platform and related technologies, ensuring alignment with the organization's mission and strategic goals. This role will be pivotal in aligning Salesforce with CBST's mission and strategic goals by enhancing data systems, driving technology improvements, and collaborating across departments, including programs, development, operations, and finance.

The ideal candidate will have strong technical expertise, a passion for process improvement, and the ability to translate complex requirements into practical solutions.

Key Responsibilities:

Salesforce Administration and System Improvement (50%)

- Oversee day-to-day Salesforce administration, including system configuration, maintenance, and enhancements.

- Collaborate with stakeholders to design and implement scalable solutions that support programmatic, operational, and fundraising goals.
- Configure custom objects, fields, workflows, validation rules, and automation tools to optimize platform performance.
- Integrate Salesforce with third-party tools for event management, email marketing, donation processing, and more.
- Lead technology change management initiatives, ensuring smooth adoption and alignment with organizational priorities.
- Engage in relevant professional development opportunities to stay current with Salesforce advancements and nonprofit technology trends.
- Build relationships within the wider Salesforce, synagogue, and nonprofit tech communities to leverage shared knowledge and best practices.

User Support and Training (20%)

- Provide user support to staff, ensuring effective usage and troubleshooting of Salesforce and related technologies.
- Design and deliver training sessions and user documentation to empower staff with best practices and ongoing development of skills in use of CRM.
- Foster a culture of learning and continuous improvement across teams regarding CRM practices and data management.

Data Management and Integrity (20%)

- Develop and execute data integrity protocols to maintain clean, accurate, and reliable data.
- Lead data migration projects from legacy systems into Salesforce, ensuring quality and consistency.
- Regularly audit and monitor data quality, addressing issues proactively.

System Maintenance and Security (10%)

- Manage user permissions, profiles, backups, and security settings to ensure appropriate access and data protection.
- Stay up-to-date on Salesforce updates and best practices to incorporate new features effectively.
- Maintain and oversee sandbox environments for development and testing.

Year 1 Primary Goals:

- Build a third-party integration between SF and an email marketing solution (such as Mailchimp) to allow for curated and thoughtful donor and member journeys.
- Improve revenue tracking and generation processes via third-party integrations and automations.
- Improve event registration systems and processes, particularly in the lead up to High Holidays 2025.
- Restructure Salesforce to allow for moves management, portfolio management and meaningful engagement tracking.
- Conduct a full database audit and implement a cleanup and deduplication plan to achieve a high level of data accuracy.

Qualifications and Qualities:

- High School Diploma or GED required. Bachelor's degree preferred.
- 5+ years preferred of progressive Salesforce administration experience, ideally with Nonprofit Success Pack (NPSP).
- Experience in synagogue settings with CRM systems, understanding their business processes and CRM needs is strongly preferred.
- A high level of proficiency in producing SF reporting around programming and development.
- Familiarity with integrated third-party tools such as Form Assembly, Apsona, Mailchimp, or HubSpot is a plus.
- Demonstrated ability to plan and execute technology change management projects.
- Strong analytical, problem-solving, and project management skills.
- Excellent communication and interpersonal skills, with an ability to work collaboratively.
- A high level of integrity with a commitment to honest and transparent communication.
- Ability to build and maintain positive working relationships with colleagues across departments and levels.
- Excellent attention to detail.
- Strong time, project, and people management skills.
- This hybrid position requires working on site at CBST's building in Manhattan's north Chelsea Neighborhood (West 30 Street, between 6 and 7 Avenues) at least 3 days a week in person (currently Tuesdays, Wednesdays, and Fridays)

Salary: \$70,000 - \$85,000, commensurate with experience

Paid time off: In the first year of employment, employees are eligible for approximately a combined 40 days of vacation, holiday, and sick leave (10 vacation days, 25 paid holidays, 5 sick days per year). Additional vacation days accrue according to years worked in the synagogue.

Medical and other benefits: Employees are eligible to participate in a range of medical, dental and vision insurance plans with CBST covering all or most of the cost for employees; 403b plan; flexible spending account; commuter benefits; family leave; opportunities for ongoing professional development; and other benefits available to full time employees.

To Apply: Send resume and cover letter to: careers@cbst.org.

Equal Opportunity Employment:

Our Congregation benefits from clergy, rabbinical and cantorial interns from the Reconstructionist, Conservative, Orthodox, and Reform movements of Judaism. Our staff and lay leaders bring a diversity of backgrounds, expertise, and experience to the community. Together, we take pride in our work and in the strong community we lead, learn with, and support. Apply now and become part of our mission- driven and vibrant community.

CBST is an equal opportunity employer. All applicants will be considered for employment without attention to race, color, religion, sex, sexual orientation, gender identity, national origin, veteran, or disability status.