CRM/Salesforce Manager

Congregation Beit Simchat Torah (CBST)

Department: Operations

Reports to: Director of Operations

Location: New York City

Position Type: Full-Time, Exempt

Salary Range: $90K- $100K

Position Summary

Congregation Beit Simchat Torah (CBST) seeks an experienced, highly organized, and collaborative CRM/Salesforce Manager to oversee the administration, optimization, integration, and ongoing development of the congregation's Salesforce ecosystem.

The CRM/Salesforce Manager serves as CBST's primary internal expert and administrator for Salesforce Nonprofit Success Pack (NPSP), FormAssembly, GoFundMe Pro, and related systems. This position is responsible for ensuring that CBST's technology infrastructure effectively supports membership management, fundraising and advancement, program registration, community engagement, financial reporting, and organizational operations.

CBST is currently transitioning to GoFundMe Pro as a key component of its fundraising and payment-processing infrastructure. The CRM/Salesforce Manager will play a central role in implementing and optimizing this transition, ensuring accurate data integration, efficient workflows, reliable revenue tracking, and successful staff adoption.

This is a hands-on technical and operational role requiring strong Salesforce administration skills, experience managing complex integrations, excellent project management capabilities, and the ability to translate organizational needs into practical, sustainable technology solutions.

The successful candidate will be both a strategic thinker and a detail-oriented problem solver, comfortable working independently while collaborating closely with staff and leadership across departments.

Key Responsibilities

1. Salesforce Administration and System Optimization (30%)

- Serve as the primary administrator and internal subject matter expert for CBST's Salesforce NPSP environment.
- Oversee day-to-day administration, configuration, maintenance, troubleshooting, and ongoing system improvements.
- Configure and maintain custom objects, fields, page layouts, validation rules, permission structures, Salesforce Flows, and automations.
- Evaluate existing workflows, processes, and system architecture to identify inefficiencies, redundancies, and opportunities for improvement.
- Develop scalable solutions that support membership, development, programming, operations, and finance.
- Simplify and improve the user experience through thoughtful system design, intuitive page layouts, and streamlined processes.
- Maintain clear documentation of system configurations, integrations, automations, and operational procedures.
- Evaluate Salesforce updates, new features, and emerging nonprofit technology tools for potential organizational benefit.
- Prioritize and manage system enhancements in collaboration with the Director of Operations and departmental stakeholders.

2. GoFundMe Pro Transition, Integrations, and Payment Systems (25%)

- Serve as the internal technical lead for CBST's ongoing transition to GoFundMe Pro, working with internal stakeholders, external consultants, and vendor representatives as appropriate.
- Oversee configuration, testing, troubleshooting, and optimization of the integration between GoFundMe Pro and Salesforce NPSP.
- Ensure that donations, recurring gifts, campaign information, constituent records, and other relevant transactions are accurately captured and synchronized.
- Develop and maintain appropriate data mapping, gift attribution, campaign coding, and reconciliation workflows.
- Collaborate with Development and Finance staff to ensure consistent and accurate

revenue tracking, reporting, and reconciliation.

- Identify and resolve integration errors, duplicate transactions, incomplete records, and data synchronization issues.
- Support the configuration and optimization of donation forms, fundraising campaigns, recurring giving, and other GoFundMe Pro functionality.
- Establish testing, quality assurance, and monitoring protocols for new and existing integrations.
- Evaluate and maintain integrations between Salesforce and other platforms, including FormAssembly, email marketing, event registration, and related systems.
- Document integration architecture, data flows, procedures, and troubleshooting protocols to ensure long-term sustainability.

3. FormAssembly, Registration Systems, and Workflow Automation (15%)

- Administer and optimize FormAssembly as a core platform for CBST's registration, information collection, and constituent engagement activities.
- Design, build, maintain, and troubleshoot forms and Salesforce connectors supporting programs, events, membership