

JOB DESCRIPTION

POSITION TITLE: Advanced CRM Applications Manager

DEPARTMENT: Sales & Marketing Data (SMD) Team

PRIMARY JOB FUNCTION:

- ❑ **Manage the entire CRM and related business applications stack** – Support approx. 100 Salesforce users and related applications, including MapAnything, Riva Outlook Sync, Seismic Content distribution, BrightScope Beacon for DCIO users, MarketBuilders for Institutional users, Demand Tools, DataLoader, Salesforce Reports and Dashboards, Power BI and Skuid.
- ❑ **Increase Adoption of the CRM and related applications** – Drive increased adoption of the CRM through a best practice and on-going training strategy to ensure end users have ample communications to understand the benefits of utilizing the CRM.
- ❑ **User Support** – Accountable for primary end user support of Salesforce.com and related applications, including the responsiveness and quality of response. Cross-train other SMD team members to spread the user support workload.
- ❑ **Rollout of CRM Enhancements** – Responsible for the development and execution of training materials and events to implement new CRM Enhancements in development for key stakeholders.
- ❑ **Data Cleansing** – Lead in the ongoing cleansing of Salesforce.com and related applications, with the support of other SMD team members.
- ❑ **Data Integration, Reporting and Dashboards** – Lead in the development of mappings to the TransAccount and/or data warehouse from Salesforce and preparation of end user reports and dashboards.

DUTIES AND RESPONSIBILITIES:

- ❑ Roll out Lead Management for TSC: Work with Digital Marketing team to review.
- ❑ Work with Institutional data set and the key metrics that drive their business to determine how we can better serve the Institutional users through the CRM and related apps.
- ❑ Implement required changes to TSC's annual business plan to support the key metrics that will be required by sales management. This will include targeted FAs, meeting counts, activity counts, and sphere of influence sales and asset reporting. Design and support annual updates to the CRM based on the business strategy.
- ❑ Data cleansing – Cross train SMD team members on SFDC record level data cleansing from TADB integration – running jobs, reviewing error logs and essentially minimize the redundant daily work required to cleanse the ever-changing data.
- ❑ Primary support for Internal Sales Desk Manager reporting and dashboard requests. Utilize Salesforce or Power BI dashboards to support the requests.
- ❑ Monthly – Produce a “Best Practices” communication to the SFDC users to address common support questions as a way to continually educate the users and increase adoption of SFDC.
- ❑ Quarterly – Minimum 2 sessions for all Salesforce users to get a 45 minute WebEx on features that are underutilized.
- ❑ Onboarding of New Employees – Document a standard onboarding program for key Salesforce and its 3rd party application functions.

MINIMUM EXPERIENCE AND FORMAL REQUIREMENTS:

- ❑ 2+ years' experience working with an asset management, mutual fund, or financial services organization.
- ❑ 3+ years' experience as a Certified Salesforce.com Administrator
- ❑ Salesforce.com Advanced Administrator Certification a plus
- ❑ 2+ years' experience with declarative application development, building custom objects, workflows, formulas and reports and dashboards in Salesforce.com
- ❑ Exposure to ETL tools such as Microsoft SSIS, Task Factory a plus
- ❑ Experience or exposure to Salesforce 3rd party applications such as Riva, CRM Fusion, MapAnything, Seismic and SKUID a plus
- ❑ Ability to build PowerBI dashboards and reports
- ❑ Proficiency in Excel
- ❑ Proficiency in PowerPoint

PERSONAL CHARACTERISTICS:

- Highly motivated self-starter who builds trust with end users and management
- Ability to survey and listen to business stakeholders and articulate application function requirements, reporting and dashboarding requirements, workflow and other system-oriented requirements
- Ability to work cross-departmentally
- Analytical in nature
- Comfortable presenting to groups of 20+ people
- Excellent written and oral communication skills

PHYSICAL REQUIREMENTS:

- Ability to work at a computer for extended periods of time

TRAVEL

- Minimal – primarily education and conference-related travel; <5% of the time