



## Salesforce Coordinator Job Description

### Role Summary:

The Carbon Literacy Project has grown rapidly in recent years, and we are continuing to progress climate education and action through Carbon Literacy. As a consequence, our systems, platforms and processes have grown with us, becoming more complex. Our customer relations management work has also grown in complexity and importance. We are negotiating and implementing increasingly sophisticated data reporting mechanisms to be able to review the effectiveness of our initiatives. We're also placing increasing focus on effective data management as being core to our GDPR, and more importantly, helping us to drive change and ensure operational efficiency. We rely heavily on the accurate collection, analysis, storage and processing of data to continue with our mission; and be able to pursue new opportunities and initiatives, as well as understand where previous ones have been successful or need further work. It's crucial that our team feel comfortable and confident using this system, and we are therefore seeking a talented individual to help us manage and develop our Salesforce system, as it is pivotal to our continued success.

<b>Role Title:</b>	Salesforce Coordinator
<b>Team:</b>	Operations
<b>Responsible to:</b>	Head of Operations
<b>Rate:</b>	FTE range: £26,500 - £29,000 (dependent on experience and translated into an equivalent hourly rate).
<b>Hours:</b>	This is a full-time, freelance contractor role (37.5 hours per week). Our usual working day is 9:30 to 17:30 but hours are flexible.
<b>Location:</b>	We offer the choice of working from our Manchester office, hybrid or remote working. You may be required to travel to Manchester or other locations for key events.

**Application Deadline:** 5pm Wednesday 11<sup>th</sup> December 2024

## **About The Carbon Literacy Project:**

The Carbon Literacy Project is a celebrated, multi-award winning, globally unique climate change project founded in Manchester and a registered charity (The Carbon Literacy Trust, Reg Charity No 1156722) based at Manchester Metropolitan University's Innospace. Carbon Literacy offers a unique and flexible framework for a day's worth of highly relevant climate change learning, and with large-scale take-up across the UK and Europe. Over 110,000 learners have now been certified as Carbon Literate.

Carbon Literacy learning and certification covers the essentials of climate change, carbon footprints, how an individual can 'do their bit', and why it is relevant from an individual to organisational level. Carbon Literacy is aimed at three distinct audiences – those that live, those that work, and those that study. As the certification body, this enables The Carbon Literacy Project to capture all audiences with its aim to offer every citizen Carbon Literacy training. As the certification body, we directly advocate for the delivery and uptake of Carbon Literacy training, support organisations, trainers and individuals to do so, and actively work to create low-carbon culture change.

## **Role Description:**

This is a very focused role, centring around the management of our CRM system, Salesforce. We use this platform in many different ways, but largely it's to keep track of organisations and individuals who are involved in Carbon Literacy in some way, in the past, present or future. It's important for us to be able to track who has been involved with our work at different points, and with various projects. It's also home to our ever-growing learner database, which keeps track of each learner who is and ever has been certified as Carbon Literate. Having a running total of this number (well over 110,000), and a selection of the details, is crucial to the smooth running of the Project, as often we need to use these figures and statistics to report back on the success of initiatives.

Therefore, having accurate data is vital in order for the whole team to function and complete their roles to the best of their abilities. This means that a large proportion of this role involves ensuring that the data we have is accurate, up-to-date, accessible and at the correct level for team members. Managing the data cleaning process that we complete in order to ensure this is a large task that involves multiple individuals at several stages. You will be required to train new team members on the data cleaning process, as well as supervise and keep track of the full timeline and overall progression.

Another essential part of the role is working with others to ensure the data that we store is secure at each stage. Current processes must be followed to safeguard data, and to confirm correct access at every level. However, we are also taking on another new team member in the coming weeks who will look at processes surrounding our data and review with scope to make improvements where required. Input into this will be important and welcomed from our Salesforce Coordinator, as they will be more familiar with the process. Any general knowledge that they can bring on best practice on keeping data secure, as well as effective methods for training team members up on Salesforce would be very beneficial.

Team training on our Salesforce system to enable them to use it to the best of their abilities is something we take very seriously, and we are aware that we have more to do across the team to ensure it's used effectively and safely. Our teams within the wider Project often need to use the system for different processes and in line with their area of work. Therefore, training needs to vary in accordance with this, and understanding which teams need it and for

what purposes will be a vital first step in improving our overall usage and functioning of the broader system.

Consequently, the role of Salesforce Coordinator be pivotal in delivering, shaping and optimising our systems, ensuring they align seamlessly with our mission, accommodate our unique structure, and support our team with their work. We are excited to welcome an individual with a diverse skill set to join our team and contribute to the innovative and impactful work of The Carbon Literacy Project.

### **Responsibilities and Duties:**

- Help to clean learner data pre-bulk import, and help manage and supervise team members assisting with this task.
- Take the lead on the bulk import process of our learner data into Salesforce.
- Data cleaning and monitoring of our wider system – potentially working alongside a specific team member, intern or volunteer to do this.
- Audit the way we use the system and the current data we record, aiming to improve on reporting and the insight we can gain from this.
- Improving the way we use the system, particularly in line with progressing 'sales leads' across various teams, to better track progress.
- Create and maintain training resources for various mini teams to ensure they can best access and utilise the system for their purposes.
- Train up the wider team on changes that we bring in, in relation particularly to data security.
- Help create a 'disaster recovery' plan for if the worst happened with our CRM system.

### **Skills and Experience**

#### **Essential**

- Understanding of and experience in an information or data-focused role with a practical, logical and thorough approach.
- Strong communication skills, and the ability to work across teams.
- Experience using a secure database, and familiarity with the challenges associated.
- Knowledge and experience of working with sensitive or confidential information and data.
- Strong organisational skills and the ability to prioritise and manage personal workload.
- Strong familiarity with Salesforce and the Microsoft Suite, particularly Excel.
- Ability to lead, manage and deliver individual projects, after initial consultation and guidance.

#### **Desirable**

- Experience training others, with coaching techniques and in effective communication.
- Experience in systems and data management.
- Experience in data protection and compliance.
- Familiarity with SharePoint, Slack, Mailchimp and/or similar systems.
- Certified as Carbon Literate.
- Experience volunteering or working with a charity, particularly in the field of sustainability and the environment.
- Interest & general knowledge of climate change education and action.

## Person Specification

- Comfortable working in a dynamic environment where work is very varied and fast-paced, but hugely rewarding.
- Ability to work very autonomously, but also as part of a team and as a collaborator.
- Used to juggling multiple tasks and effective at prioritising.
- Proactive and passionate about the role that all organisations can play in creating a low carbon future.
- Passionate about mitigating the climate crisis.

The Carbon Literacy Project is committed to promoting a diverse and inclusive community - a place where we can all be ourselves and succeed on merit. We offer a range of flexible working arrangements to support people from different backgrounds. We particularly encourage applications from individuals who are Black, Asian, or belong to an ethnic minority in the UK, as well as those from working class backgrounds, and those living with disability, all of whom are currently under-represented within The Carbon Literacy Project and the wider environmental sector.

## Application process

Please apply using the form [here](#). There is a section to attach a CV. Please do not attach a cover letter as this information is covered within the form.

If you have any additional questions, please email [careers@carbonliteracy.com](mailto:careers@carbonliteracy.com).

**All information will be treated in strictest confidence and used only within The Carbon Literacy Project and its associated projects. Information will be stored electronically. No information will be passed on or contact made with any third party without your permission.**