

# Tool #36: Sample CRM Specialist Position Descriptions

These sample job descriptions are derived from job postings listed on publically available institution websites; the origin of each posting is referenced in the footnotes of this tool. Sample position descriptions in this tool include:

1. Salesforce Administrator, Office of Recruitment, College of Business
2. CRM System Specialist, Adult-Serving University
3. CRM Specialist, Self-Supporting Continuing Education Unit
4. CRM Marketing Specialist, Adult-Serving University

The positions highlighted in this tool are most applicable for institutions pursuing a more tailored rather than off-the-shelf CRM implementation (for more information about the variety of roles involved in different implementation types, see Tool #28: CRM Resource Intensity Comparison Chart. Positions 1 and 2 are most closely related to the technical role *systems analyst*, *data base administrator*, or some combination thereof. Positions 3 and 4 are most closely related to the generalist role *process expert*, specifically in marketing.

## 1. Salesforce Administrator, Recruitment Office, College of Business<sup>1</sup>

### Position Description

“Reporting to the Director of Recruitment, the Salesforce Administrator is responsible for implementing Salesforce.com technology and software as the recruitment, alumni and corporate training client relationship management (CRM) solution for the College.

The incumbent plays a business analysis, project management and operational role in customizing and administering Salesforce.com and related AppExchange components with the express purpose of delivering on the goals and objective detailed in the College’s Recruitment Plan, and Advancement business plans.

Leveraging strong business analysis and project management, research and technical skills, the incumbent will be the author of the process for the future use of the CRM, under the direction of the Director. The incumbent will conduct research, develop and implement the training manuals and develop best practices which will serve as the benchmarks in the administration of the new CRM. Provide orientation and training to end users on the use of the CRM. The incumbent serves as a technical advisor for staff looking to take advantage of the power of the Salesforce platform.”

### Administration (50%)

- “Administer Student Recruitment, Alumni and Corporate Training databases, implemented on the Salesforce.com platform, for all users.
- Understand the functionality of Marketo, a marketing and sales automation software and other added applications.
- Perform administration of the college’s multiple Salesforce.com instances
- Provide Salesforce (SF) accounts, create user profiles and recommend security settings or other requirements to all system users.
- Regularly perform database de-duping and cleanup procedures.
- Administer ongoing support and administrative requests of users.
- Develop reports, dashboards, and processes to continuously monitor data quality and integrity.”

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<sup>1</sup> Salesforce Administrator User Group: “HigherEd Cloud”

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## 1. Salesforce Administrator, Recruitment Office, College of Business (Cont.)<sup>2</sup>

### Training and Documentation (15%)

- “Develop training plans, materials, and documentation for Algonquin Salesforce users, keep materials up-to-date, coordinate and deliver new user and ongoing training sessions across the College.
- Develop and communicate a schedule for future database releases/enhancements.
- Monitor user adoption rates and respond as needed (additional training sessions, communication, modifications, or other resources) to improve.
- Assist users with report and dashboard design and management.”

### Planning (10%)

- “Define, document, communicate, and administer a change management (release) process to develop and implement new applications and updates to existing applications.
- Work with consultants and internal staff to integrate existing information system data within Salesforce.”

### Process Discover and Management (10%)

- “Work with various functions and end users to identify, document, and communicate standard business processes as they related to the database.
- Develop and maintain data dictionary and report description documents detailing the organizational structure of the Algonquin College Salesforce instance.
- Work with management to identify new and creative opportunities to leverage the database to support additional business processes or functions.”

### Platform Integration (5%)

“Work with ITS, Web services, Registrar’s Office, and Marketing, and others to integrate web and online initiatives into the database.”

### Vendor Management (5%)

“Administer outsources Salesforce.com implementation partners as required.  
Maintain ongoing relationship with Salesforce.com and the Salesforce.com Foundation.”

### Other Responsibilities as Defined by the Director (5%)

“Conducts best practices research.”

### Qualifications

- “Two-year diploma
- Five years of experience in a marketing, sales or related field. Minimum 3 years experience in project management, database management and Salesforce CRM. Experience in documenting CRM policies & procedures. Post-secondary experience preferred.
- Salesforce Administrative Essentials
- Marketo Fundamentals (preferable)
- Project Management Basics
- Advanced Microsoft Excel”

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<sup>2</sup> Salesforce Administrator User Group: “HigherEd Cloud”

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## 2. CRM System Specialist, Adult-Serving University<sup>3</sup>

### Responsibilities

"Under the direction of the Director of Information Systems, and working collaboratively with the CRM Marketing Manager, this position will be responsible for the analysis, modification, and maintenance of application programs, databases and software solutions including Hobsons Connect CRM or other systems to meet user and organizational information, interface and reporting needs. Position will be responsible for research and analysis of data using multiple platforms to provide statistical information, reports and work flow configurations, along with other technical configuration work as directed. Position will be responsible for revising workflow, enhancing database architecture and providing technical project management when incorporating additional business processes into the CRM framework. Position uses familiarity with data, reporting and work flow tools to formulate solutions to procedural and business operational challenges. Assists and makes recommendations towards maintaining effective data quality controls, reporting and work flow efficiency."

- **Overall Project Management:** "Assume a key role in the use of Hobsons Connect CRM and other related software, and build and test efficient reports and workflows."
- **Customization of Platform for User Needs:** "Develop, design and research solutions for users through regular consultations to identify and document their respective CRM software/systems needs, work flow issues and reporting output needs."
- **Customer Service Ethic:** "Consistently seek ways to improve services through use of technology."
- Work with university functional departments, consultants and partners to enhance and maintain computer work flows that ensure high quality information in support of CRM business functions."
- **Data Management:** "Develop, maintain, and enhance data quality control reports and electronic monitoring as needed to maintain or improve efficiency."
- **Data Management:** "Troubleshoot system "bugs" and problems with reporting or work flows."
- **Communication Plan Development:** "Assist users with Communication Management functions such as analyzing office, staff, and student needs for information, developing the flow of letters, e-mails and other forms of notification, and running the necessary processes/functions to produce accurate communications."
- **Communication Plan Development:** "Review and edit communication management request definitions, improving and implementing document requests, work flows and processes as needed."
- **Platform Integration:** "Participate in software integration meetings with staff from other functional departments, consultants and partners. Integrate and coordinate testing plans with various system users."
- **Tracking and Analysis:** "Develop, implement, and maintain internal and external reports. These reports may be routine and used by numerous higher education publications or may be special, one time reports."
- **General Communication:** "Provide requested data in report format to internal clients or other requestors as appropriate."
- **Marketing Strategy Setting:** "Report new findings and recommend process improvements."
- **Training:** "Maintain documentation of all CRM application, report and work flow procedures."

### Qualifications

- Previous Experience: "2-3 years experience working with CRM data reporting or related processes"
- Education: "Bachelor's degree in the field of computer technology or adequate equivalent experience"
- Skills/Knowledge:
  - "Familiarity with Microsoft Office Suite, Argos report writing, Hobsons Connect or other CRM tools, Banner/Sungard systems is desired"
  - Formal data flow analysis methodologies

<sup>3</sup> Brandman University, <http://web.brandman.edu/jobs/details.aspx?job=12-132>

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## 2. CRM System Specialist, Adult-Serving University (Continued)<sup>4</sup>

### Qualifications (Continued)

- Campus-defined systems, applications and standards
- System/equipment capability, design restrictions and security requirements
- Integrated systems including operations systems, applications and databases
- Technical and vendor documentation for database systems and related programs
- Data structure design, relational database design and file structures
- Ability to identify hardware/software problems
- Ability to maintain current knowledge of program requirements, regulations and restrictions
- Ability to gather and analyze data, reason logically, draw valid conclusions and make appropriate concise information and recommendations available in both oral and written forms
- Ability to exercise sound independent judgment
- Intermediate level of knowledge of Microsoft Office tools particularly Word, Excel, and Outlook
- Understanding of data relationships, how data is input (manually and electronically), and how the data is reported
- Knowledge of the logic of computer applications and demonstrated ability to apply this knowledge to solve routine, extraordinary, and complex office problems
- Writing skills to enable clear, concise correspondence and manuals
- Ability to prioritize duties when faced with interruptions, distractions, and fluctuating workload.
- Ability to keep information confidential
- Demonstrated adherence to the highest standards of professional and ethical conduct
- Self-starter with the ability to perceive tasks that needs to be accomplished and take appropriate steps to achieve success
- Knowledge of basic database reporting processes
- Ability to write sound and efficient SQL queries to produce desired reporting or process outcomes.
- Critical thinking ability to understand and transfer business processes into automated work flows, given work flow tools and required training"

<sup>4</sup> Brandman University, <http://web.brandman.edu/jobs/details.aspx?job=12-132>

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## 3. CRM Specialist, Self-Supporting Continuing Education Unit<sup>5</sup>

"The CRM Analyst is responsible for analysis, customization and configuration of CRM forms and views, and the creation of custom entity configurations that extend CRM to meet business needs."

### Responsibilities

#### Data Analysis and Reporting

- "Collect information to analyze and evaluate direct marketing (email and catalog) performance and assess effectiveness of marketing campaigns. Develop and distribute direct marketing reports and analytics.
- Analyze campaign results and lead behavior, communicating findings to cross functional teams.
- Create standard and ad hoc reports on pipeline, won/lost, marketing activities, etc."

#### CRM Administration

- "Manage contact information in the Dynamics CRM database, proactively monitoring accuracy, classification and processing of all prospects.
- Monitor Dynamics CRM system to ensure proper performance, streamline processes and increase usability for end users.
- Monitor and manage database migration and integration software (Scribe), troubleshoot and resolve import errors between various databases.
- Understand CRM integration with email service provider and act as backup for Email Marketing Communications Specialist."

#### CRM Liaison

- "Act as liaison between Marketing and development team. Collaborate with users and development team to design, test and implement new Dynamics CRM features as well as troubleshoot and repair issues, and understand how multiple databases interact with Dynamics CRM (including Student Database and web).
- Provide user training, education and analytical support to UWEO organization on proper usage and increase acceptance and usability of Dynamics CRM throughout organization. "

### Qualifications

- "Experience using CRM to create routine and custom reports, and analyze marketing campaign performance and lead behavior.
- Bachelor's degree in Information Management, Computer Science, Business Administration, Marketing, Information Systems or a related field
- Required Skills/Knowledge
  - Ability to think through and implement solutions in response to identified business needs
  - Strong analytic skills and problem solving skills combined with the ability to communicate findings to all levels of an organization.
  - Basic HTML skills
  - Experience with email marketing and proper mailing list management
  - Strong technical skills and database experience, including experience using Microsoft Office
  - Superb attention to detail and organizational skills
  - Ability to multitask
  - Excellent listening, interpersonal, and written and verbal communication skills
- Preferred Skills/Knowledge:
  - Experience training peers and writing training manuals
  - Preferred 2 years of hands-on experience managing a Customer Relationship Management (CRM) database, preferably Dynamics CRM
  - Experience coordinating and participating in end user testing
  - Basic SQL skills."

<sup>5</sup> Burning Glass Technologies Labor/Insight archived job advertisements

# Tool #36: Sample CRM Specialist Position Descriptions

## 4. CRM Marketing Specialist, Adult-Serving University<sup>6</sup>

### Responsibilities

"The CRM Marketing Manager is responsible for overall management and implementation of all CRM marketing communication strategies and tactics delivered through the CRM system to drive student enrollment growth...

The CRM Marketing Manager will lead the development, execution and performance-tracking of segmented communication flows for both short- and long-term lead nurturing to motivate prospective students to move through every stage of the enrollment process."

- **Stakeholder Coordination:** "Work with internal and external partners to develop, implement, track and measure CRM marketing segmented communication strategies and tactics for prospective students."
- **Tracking and Analysis:** "Manage the overall performance and effectiveness of the program, including day-to-day management of the platform and website interface, and CRM targeted campaigns and projects. Develop ROI analyses, track, measure, and analyze key performance indicators. Synthesize multiple, disparate reporting sources, identify and implement new reports and dashboards via CRM system. Manage CRM project timelines."
- **Stakeholder Coordination:** "Review senior leadership's CRM vision periodically to ensure ongoing execution and future enhancements to segmented communications/content continue to deliver on this vision. Work specifically with campus and administration staff to identify and implement new CRM marketing strategies and tactics that will enable them to meet or exceed their enrollment goals."
- **Communication Plan/Segmentation Management:** "Develop comprehensive CRM management processes and segmented communication flows and web-based content segmentation for all prospective and enrolled students and alumni to move these segments through to conversion, retention, as well as referral and university advancement goals. Different CRM strategies will be developed according to explicit (region, academic program of interest, enrollment term, education history, etc.) and implicit/behavioral data, such as time on database, last action taken, website/email activity, etc."
- **Marketing Strategy Setting:**
  - "Identify CRM program opportunities, inquiry process improvements, and marketing-mix and channel shifts that drive incremental lead conversion and implement these opportunities/improvements."
  - "Analyze primary and secondary research, market conditions and competitive landscape to produce market assessments that identify CRM opportunities and innovative marketing ideas."
  - "Stay updated on CRM best practices and industry trends to identify innovative strategies and solutions that will drive growth in student enrollments."
- **Training/Management:** "Manage, coach and develop one direct report, Email Marketing Analyst."

<sup>6</sup>Brandman University, <http://web.brandman.edu/jobs/details.aspx?job=11-099>

# Tool #36: Sample CRM Specialist Position Descriptions

## 4. CRM Marketing Specialist, Adult-Serving University (Continued)<sup>7</sup>

### Required Qualifications

- “Hands-on, mid-level manager with five years of experience in CRM program management
- 7-10 years of professional experience in marketing particularly in the areas of database/direct marketing, developing database segmentation strategies, segmented messaging/communications strategies, measurement and analytics.
- Undergraduate degree in Marketing, Business, or related field required
- Knowledge and aptitude working with website, database technologies and CRM systems. Must embrace innovative technologies for marketing purposes. Experience with online CRM, advertising and lead generation, website/mobile marketing technologies email, social media and experience with technical project management processes.
- Outstanding project and time management skills and ability to organize multiple and complex tasks that involve technology integration; experience working on multiple projects simultaneously under tight deadlines and with competing priorities.
- Strong analytical and critical thinking skills with a disciplined, well-informed approach to problem-solving and decision-making.
- Ability to quickly trouble-shoot any issues that arise and to effectively break through complex, ambiguous and opaque issues and undefined processes to define and recommend clear, well-supported and feasible solutions.
- Must be able to lead and manage cross-functional teams and communicate effectively with senior staff, faculty, other members of the campus community, as well as external service providers, vendors and agencies.
- Ability to work independently, be self-motivated, and results-oriented with a strong sense of accountability
- Outstanding marketing and business writing/editing skills.
- Must possess strong written and verbal communication skills and experience presenting in a compelling and persuasive manner to senior staff
- Team-building, partnering, and strong interpersonal skills
- Ability to focus and thrive in a highly dynamic and fast-paced work environment
- Advanced skills using Microsoft Office applications (Excel, Word, PowerPoint, Outlook)”

### Desired Qualifications

- “MBA degree strongly preferred
- Experience in marketing for an education institution
- Ability to write data queries, use database applications (e.g., Access) and querying/reporting tools
- Experience using Photoshop, GoLive, Acrobat, and Silverpop (or other email platform) a plus
- Familiarity with A/B and multi-variant testing”

<sup>7</sup>Brandman University, <http://web.brandman.edu/jobs/details.aspx?job=11-099>