

Job Description - Head of National Salesforce Platform (PB2)

Job summary

This is an exciting new role - Forestry England is looking for a Head of National Salesforce Platform to lead and deliver the development and integration of a critical (CRM) system. Forestry England is a world leader in sustainable forestry and the largest provider of outdoor recreation in the UK, with over 300million visits to the nation's forests last year.

We have created 'Connections' by onboarding multiple legacy systems onto the market leading Customer Relationship Management (CRM) system, Salesforce. Our national platform provides our membership offering, integration with parking systems, fundraising capabilities, volunteer and permission management and marketing automation functionality. As Forestry England moves to increase its business performance and efficiency and grow the net contribution from our growing Recreation and Visitor Development business, putting customers and insight at the heart of what we do is crucial to the success of the future organisation.

Purpose of the Job

Forestry England has implemented an MVP solution to transition key recreation systems legacy systems to Connections (our internal name for our CRM, Salesforce and Marketing Cloud). This has seen fundamental changes in the way we conduct business and our connections with our Recreation customers, third parties and volunteers, however there is more to achieve. Over the next 5 years, Connections will provide a 'single customer view' for event permissions, enquiries /complaints, volunteer management, membership, legacy giving, ticketing and more.

The CRM system will allow Forestry England to deliver better public interactions and customer service; improvements to our marketing intelligence, by enhancing the way we engage with our members, visitors, volunteers and the wider public, thus enabling Forestry England to increase revenue, visitor numbers and better tell the story about what we do for the nation's forests.

Reporting to the Executive Director of Recreation & Visitor Development and in close cross-functional collaboration with teams from across the business including IT and Marketing the role-holder will be responsible for securing and consistently delivering high-quality outcomes and contributing to significant business improvement by leading the critical system for Recreation customers, members and volunteers at Forestry England.

The role-holder will act as the lead Salesforce professional, being able to make recommendations, influence and drive business decisions ensuring organisational performance is improved, enable strategic decision making at a site, district and national level by revolutionising the way Forestry England uses its data analytics to improve performance and revenue. The post-holder will be responsible for business-critical system functionality, supporting 365 business operations across the nation's forests.

The CRM system manages 140,000 contacts across member, volunteer, permission holder, donor and subscriber audiences. The platform supports approximately 450 internal Salesforce users and 60,000 external portal users, with operational support provided by a 10 person internal team and key business SMEs. The system is delivered and maintained within an annual budget of ~£2.5m.

You will form part of the national leadership team for Recreation which is part of Forestry England's National Operations team. Success in this role will require energetic and collaborative leadership which develops the 'one team' culture across a wide range of activities and is inclusive of National and District staff. The role involves advocacy of the development of Forestry England's CRM functionality and driving the strategy for the growth of the platform within the organisation. It requires high levels of Salesforce experience and technical proficiency to continuously develop the platform and the deployment of this within business processes. You will have line management of 3 resources across the Business Analyst, Technical and Delivery teams.

Key responsibilities & accountabilities

Strategic Vision and Direction

- Maintain an up-to-date view of the vision and objectives of Forestry England through proactive engagement with key stakeholders
- Initiate constructive dialogue with senior stakeholders with ideas & innovations for improving the operations of Forestry England utilising the Salesforce platform
- Develop and maintain a 3-5 year strategic roadmap of Salesforce solutions that maps to Forestry England vision and strategy
- Maintain knowledge and understanding of Salesforce and its innovations through proactive strategic engagement with senior Salesforce executives
- Maintain strategic view of Salesforce expertise & capability needs required to support strategic roadmap
- Champion business value of Salesforce to Forestry England executive
- Champion and lead the Salesforce support team to drive innovation, and continuous improvement of operations/BAU
- Ensure benefits realisation of investment in the platform including use of insight

Technical

- Head of CRM profession
- Ensure Forestry England is able to make informed decisions • Ensure AI integration is optimised across the platform securely
- System security, as system owner, working with IT and IT / Cybersecurity colleagues to deliver against Forestry Commission and HMG DDaT frameworks, standards and best practice, ensuring compliance obligations are adhered to
- Support test, audit and assessments activities and engage with IT and security colleagues to implement change and remediation activities
- • Disaster Recovery and resilience, responsible for managing and testing Connections DR Plans and continually develop and improve them while engaging with wider DR/Business Continuity activities
- • Data compliance working with KIM team on data and information governance legislation, frameworks, standards, policies and practices

Programme Management

- Lead reporting to and management of Programme Steering Group, including annual review of Terms of Reference
- Responsible for the iterative development and delivery of change within the Connections (Salesforce and Marketing Cloud) platform • Unblock obstacles to ensure delivery of solutions on-time, within budget and of high quality. Driving the team to completion and escalate decisions where required.
- Accountable for setting a CRM roadmap of delivery, reporting regularly to Senior Management on project progress
- Governing the project charter process for net new projects/initiatives ensuring clear KPIs, objectives, defining roles & responsibilities and benefits/ROI are identified and traceable throughout the project.
- Ensuring the project team is sufficiently resourced to achieve milestones
- Responsible for the oversight of recruitment within the team and owning the onboarding/offboarding of all new team members
- Understand the need to ensure Data Protection and Privacy Legislation and IT Security mechanisms are adhered to throughout the system and processes
- Facilitate regular reporting cadences to key forums including Programme Boards and Steering Group
- Responsible for the governance of Connections delivery including RAID, Action and Decision Log, escalating to the organisational risk register where required.
- Oversee change management strategy for Connections including user adoption strategies, training and transition planning.

Relationship Management

- Head of Salesforce expertise within Forestry England, leading business roadmap discussions to provide guidance on how the technology can support the business strategy.

- Initiate stakeholder engagement to understand the needs of the business areas, aligning these with the functionality of the new system, ensuring increased efficiencies through system integration and agreed processes
- Recognise the need for coordinating activities and delivery across multiple internal projects, both technical and operational, uniting previously siloed business areas.
- Working with 3rd party partners and suppliers to ensure integration of the business-critical business systems are achieved
- Supporting colleagues where 3rd party contracts are not team-owned, but require Connections/CRM involvement in critical delivery
- Work across Forestry England to build a forward-looking pipeline of CRM business requirements, incorporating new areas of the business and responding to new CRM functionality requests to ensure agile and timely CRM solutions are delivered

Financial and Procurement Management

- Manage the 5-year platform budget, establishing accurate forecasting on a monthly basis
- Ownership of Platform cost centre ensuring accurate actual reconciliation, and supporting those delivering regular related administrative tasks
- Provide regular financial reporting to key stakeholders and Heads of Department
Monitor and control resources, revenue and capital costs against the project budget, identifying any challenges immediately
- Ownership of the procurement process and contracts for all existing and net new software engagements within the Connections estate
- Responsible for the management of third parties ensuring delivery against contracted objectives
- Ensuring best value and compliance with use of public funding
- Responsible for the production and management of the 5-year business plan for the Salesforce Platform including budget to support the roadmap and strategy.

Skills, knowledge & experience

Essential professional and technical experience

- 5+ years of demonstrable experience in shaping, leading, managing and successfully delivering a complex corporate CRM system into a business
- Managed a programme/departmental budget
- Experience of programme managing the delivery at least one new Salesforce CRM implementation into an organization of +500 persons
- Line Management experience of 5-10 headcount
- Solid understanding of the Software Development Lifecycle (SDLC) and different delivery approaches e.g. Agile PM
- In-depth knowledge of Salesforce product suite
- Demonstrable project management skills, especially project planning, risk management and stakeholder engagement
- Demonstrable understanding of system security, data compliance and business continuity management
- Significant experience in working with 3rd party providers of software systems
- Competent in Microsoft 365 platform
- Have strong verbal and written and communication and presentation skills and delivers clear and concise information tailored for different stakeholders and situations

Desirable professional and technical experience

- Degree in business, project management, technology or related field
- Procurement experience (Renewals/Net New contracts)
- Salesforce Administrator Accreditation
- Understanding of Salesforce architecture, metadata, API integrations, and DevOps tooling (e.g. Copado)