Job Description – Connections Operations Officer (PB5)

Job summary

As Forestry England moves to increase its business efficiency and grow the net contribution from Recreation and Visitor Development, putting customers at the heart of what we do is crucial to the success of the future organisation.

Forestry England is the largest provider of outdoor recreation in the UK with over 300million visits to the nations forests last year. The CRM (Connections) Team are onboarding multiple legacy systems onto the market leading Customer Relationship Management (CRM) system, Salesforce. The platform provides a Membership offering, integration with Parking systems, Fundraising capabilities, Volunteer and Permission management and Marketing automation functionality to Forestry England.

Key responsibilities & accountabilities

The Salesforce platform at Forestry England has reached a level of maturity with a range of solutions that the business users across various functions rely on.

This role of Salesforce Operations Officer requires a good understanding of business operations and bridging the gap between Forestry England and the Connections Programme. The post holder should understand the strategically critical role of the CRM System in delivering the visions and aims of Forestry England and the Growing the Future 2030 programme.

At Forestry England the CRM Operations Officer will enable the efficient running of the CRM System team and projects that support the Salesforce platform and other Salesforce products, for example Experience Cloud, Marketing Cloud, Service Cloud and Salesforce native apps like Gimbal and FinDock. The post holder will be responsible for coordinating activities within the business to ensure successful and smooth running of projects, people and platforms for the system.

The location of this post is within the CRM System Team and post holder can be remote. The post responsibilities cover the whole of England, and it is expected that the post holder may need to travel occasionally. Please be aware that this role can only be worked in the UK and not overseas.

Key Work Areas

- Working alongside CRM System team colleagues to onboard the new CRM system, Salesforce. You will work closely with this team to support delivery of the strategic roadmap, supporting the Head of Salesforce Platform in considering the programme as a whole to limit siloed working and aligning to Forestry England strategic missions.
- Onboarding of all permanent and contractor resources to the team including contractual and induction activities. This includes administration supporting weekly timesheet approval and ad-hoc expense approval.
- Lead the comms and engagement strategy for the platform (existing and new feature rollout). This may include developing internal communications plans, liaising with key stakeholders, coordinating system-focused working groups and working with team colleagues to deliver adjacent functions e.g. training and testing programmes.
- Lead upward internal comms to exec and board reporting with input from Head of Salesforce Platform and other team members.
- Responsible for central system mailbox ensuring delegation and/or response to key queries, requests where required. Key point of contact for the platform, operations and team. Become a proficient user of Salesforce to assist with development ideas and become the subject matter expert to provide customer

service to internal and external users. This knowledge should enable the post holder to support the service administration team during extended periods of annual leave to ensure an uninterrupted service user experience.

- Ensure compliance with policy and procedures, including financial transactions, direct debit and GDPR. This will also include IR35 compliance for contractor resources within the team and will require continuous development of data protection legislation.
- Support the Head of Salesforce Platform in the end-to-end procurement process including new and renewals for all third-party applications and services provided that are essential to the running of the Salesforce platform. This may be done through financial tracking, contract coordination and procurement document administration. All procurement reporting required by the National Operations Business Support team should be directed to the post holder initially.
- Co-ordinate meetings for the CRM Systems Team from the governance to project lead meetings, ensuring regularity, producing minutes and action points in a timely manner.
- Raising Purchase Orders, paying invoices, monitoring spend and participating in quarterly budget reviews
- This role will report directly to the Head of Salesforce Platform.

Skills, knowledge & experience

Essential professional and technical experience

- Proven administrative ability and attention to detail.
- Works independently and can prioritise work to meet tight deadlines.
- Competent IT user with experience of Microsoft suite of applications (Word, Excel, Teams and Outlook).
- Experience of working with CRM database software
- Excellent written and verbal communication skills, including the ability to have difficult conversations

Desirable professional and technical experience

- Knowledge of Salesforce CRM System
- Experience of using specialist Ticketing, Membership, or Volunteering CRM software and implementing new functionalities within these systems
- Understanding of budget monitoring