

Position Description

Title: Salesforce Administrator
Division: Operations
Reports to: Chief Operating Officer

Travel: Travels in-state and out-of-state as required
Status: Salaried, Exempt
Standard Work Hours: M – F, 9:00 AM – 5:30 PM

JOB SUMMARY:

The Salesforce Administrator is responsible for the administration, configuration, optimization, and ongoing support of Hawaiian Council’s Salesforce environment. This position serves as a key technical resource to ensure Salesforce effectively supports organizational operations, programs, data management, reporting, and strategic initiatives.

The Salesforce Administrator partners with departments, leadership, and other stakeholders to understand operational needs and translate those needs into scalable and sustainable Salesforce solutions. The position is responsible for maintaining system functionality, data integrity, security, documentation, testing, change management, and continuity of the Salesforce environment.

DUTIES, RESPONSIBILITIES, and EXPECTATIONS:

Duties and responsibilities include, but are not limited to the following:

Salesforce Administration & Configuration

- Administer and maintain the organization’s Salesforce environment, including users, profiles, permission sets, roles, applications, objects, fields, record types, page layouts, Lightning Record Pages, and related system configurations.
- Configure and maintain all Salesforce products or applications utilized by the organization.
- Design, configure, and maintain declarative automation, including Salesforce Flow, formulas, validation rules, approval processes, rollups, and other platform automation.
- Monitor system functionality, performance, storage, platform limits, and overall system health.
- Troubleshoot system issues and coordinate timely resolution of technical and user-related problems.
- Evaluate Salesforce releases, platform enhancements, and emerging capabilities and recommend appropriate improvements.

Business Solutions & System Design

- Partner with departments and business stakeholders to identify operational requirements, workflow challenges, and opportunities for system improvement.
- Lead or participate in discovery sessions to understand business processes and translate requirements into appropriate Salesforce solutions.
- Evaluate proposed enhancements and determine appropriate technical approaches while considering scalability, maintainability, security, and organizational needs.
- Develop and maintain technical diagrams, process maps, requirements, and other documentation necessary to support system design and implementation.
- Provide technical guidance to leadership and stakeholders regarding Salesforce capabilities, limitations, implementation considerations, and technology planning.
- Support the design and administration of public-facing Salesforce experiences, portals, applications, and intake processes as needed.

Data Management, Reporting & Security

- Maintain the integrity, accuracy, security, and appropriate accessibility of organizational data maintained within Salesforce.
- Support data imports, exports, updates, migrations, reconciliation, cleanup, and other bulk-data activities.
- Develop and maintain reports and dashboards that support operational, programmatic, and leadership decision-making.
- Partner with data and business teams regarding data models, data standards, reporting requirements, and system changes.
- Design and maintain appropriate Salesforce security models, including user access, permissions, sharing rules, and other controls.
- Ensure Salesforce configurations and data-handling practices support organizational privacy, confidentiality, security, and compliance requirements.

Integrations & Technical Support

- Support integration between Salesforce and third-party systems, applications, managed packages, and integration platforms.
- Work with developers, system architects, vendors, and other technical resources when custom development or specialized integrations are required.
- Troubleshoot integration, automation, data, and application issues and coordinate appropriate remediation.
- Evaluate third-party applications and technical solutions for compatibility with the organization's Salesforce environment.

Testing & Quality Assurance

- Develop and execute testing procedures for Salesforce enhancements, configurations, automations, and system changes.
- Coordinate User Acceptance Testing (UAT) with business stakeholders and designated users.
- Develop and maintain UAT plans, scripts, test cases, results, and other supporting documentation.
- Identify defects and system issues and coordinate remediation prior to production deployment.
- Maintain appropriate testing documentation to support regression testing and future system changes.

Change & Release Management

- Manage Salesforce environments and support appropriate development, testing, sandbox, and production practices.
- Coordinate the movement of system changes between environments using established change-management and deployment processes.
- Maintain appropriate records of system changes, configurations, deployments, and releases.
- Prepare and communicate release notes, system updates, planned maintenance, and other information affecting Salesforce users.
- Coordinate with business and technical stakeholders to minimize disruption associated with system changes.
- Support the continued development of structured DevOps and release-management practices.

Documentation & Business Continuity

- Develop and maintain comprehensive documentation of Salesforce configurations, automations, integrations, workflows, data structures, security settings, and administrative processes.
- Maintain system runbooks, standard operating procedures, troubleshooting guides, configuration documentation, and other materials necessary for ongoing administration.
- Document significant system changes and technical decisions to ensure appropriate historical records and organizational knowledge.
- Maintain documentation in an organized and accessible repository.
- Ensure sufficient documentation and knowledge transfer to support business continuity and reduce organizational dependency on individual institutional knowledge.
- Participate in cross-training and knowledge-sharing activities with appropriate staff and technical resources.

User Support & Organizational Collaboration

- Provide technical support, guidance, and training to Salesforce users.
- Develop user documentation, instructions, and other resources to promote effective system adoption.
- Communicate technical information clearly to both technical and nontechnical audiences.
- Build collaborative relationships with departments to understand business needs and improve utilization of Salesforce.
- Support organizational initiatives, events, programs, and special projects requiring Salesforce or technology assistance.
- Perform other duties and special assignments as directed by the Chief Operating Officer.

EDUCATION AND EXPERIENCE:

- Bachelor's degree in Computer Science, Information Systems, Information Technology, Business Technology, or a related field preferred. Relevant professional experience may be considered in lieu of a degree.
- Experience with LLM tools and Salesforce AI capabilities.
- Minimum of three (3) years of progressively responsible Salesforce administration or comparable CRM administration experience preferred.
- Salesforce Certified Administrator certification preferred.
- Demonstrated experience configuring and administering Salesforce, including objects, fields, permissions, page layouts, reports, dashboards, automation, and data.
- Experience with Salesforce Flow and other declarative automation tools.
- Experience managing data imports, exports, reconciliation, and data-quality activities.
- Experience supporting system testing, User Acceptance Testing, and change-management processes.
- Strong proficiency with Microsoft Excel or comparable data-analysis tools.
- Strong analytical, troubleshooting, organizational, and problem-solving skills.
- Ability to independently research technical issues and identify practical solutions.
- Ability to effectively communicate and collaborate with technical and nontechnical stakeholders.
- Ability to work independently and collaboratively while managing multiple priorities and deadlines.
- High degree of professional judgment, integrity, discretion, and attention to detail.
- Knowledge, understanding, and sensitivity to Native Hawaiian issues preferred

WORK ENVIRONMENT:

This position primarily operates in a professional office environment and requires regular use of computers, software applications, telecommunications equipment, and other standard office technology. The role involves extended periods of computer-based work and regular participation in virtual and in-person meetings.

Occasional work outside of standard business hours may be required to support system implementations, production releases, maintenance, troubleshooting, critical system issues, organizational events, or other operational needs. In-state and out-of-state travel may be required.

The work environment may periodically include assignments at organizational events, program locations, or other work sites outside of the employee's primary office.

This job description is a general overview and may be subject to change based on the needs and requirements of the organization. I acknowledge that I have read and understand the above job description in its entirety and am capable of performing all of the stated requirements.

Employee Signature

Date