

POSITION DESCRIPTION

Position Title: MIS/Reporting/SalesForce Coordinator	Location: Operational Services Center	Status: Exempt
Department: Operations/IT	Position Supervisor: Director of Information Technology	

Purpose of Position:

Responsible for organizing, modifying, and supporting the Bank’s SalesForce platform. Designs, modifies and implements reports, dashboards, workflows and other SalesForce and Force.com platform items as needed. Works directly with end-users to coach and teach how to best use and utilize all bank systems. Serves as primary internal support contact and champion for the Bank’s SalesForce needs with internal teammates, partners and vendors. Supports other IT-related efforts as required.

Essential Position Responsibilities:

System

- Maintains and coordinates the setup of SalesForce, Force.com apps (nCino, Vana, etc.), and other bank software, hardware and systems.
- Supports the administrative needs of the SalesForce and Force.com platform Apps.
- Creates, implements and maintains reports, dashboards, workflows, system setup and access as needed within SalesForce and Force.com apps as needed.
- Enhance operational efficiency of SalesForce, Force.com apps, workflows, and other bank systems as required.
- Ensure design of system allows all components to work properly together.
- Troubleshoot problems reported by users.
- Make recommendations for future upgrades.
- Maintain, Install and deploy system and system component upgrades as needed.
- Maintain network and system security.
- Analyze and isolate issues.
- Monitor platform/systems to ensure security and availability to specific users.
- Evaluate and modify system's performance.
- Identify user needs.
- Maintain integrity of the systems, and security.
- Evaluate and implement new technology and system improvements as needed.
- Maintain appropriate settings, in individual machines, such as drivers and settings of personal computers as well as printers to utilize the system optimally.
- Ensure the proper implementation and integration of secure mobile solutions utilizing the SalesForce and Force.com platforms.
- Keeps a log of problems and resolutions.

- Partner appropriately with IT teammates to address any needs.
- Trains staff as necessary on upgrades and new software/hardware.
- Other IT-related roles, responsibilities and requested as directed by IT leadership.

Education, Experience, and Equipment Requirements:

A bachelor's degree in technology or Microsoft designation or a minimum of three (3) to five (5) years experience in the field is preferred. Proficient use of Office, various Windows Operating Systems, Browsers, Salesforce, Google Enterprise Apps, Force.com platform, PCs, thin clients, and some network experience a plus. Previous banking experience is preferred as well as experience with telecommunications and other bank-related technology products.

Special Requirements and Work Conditions for this position:

Individual must be professional and have strong verbal communication skills. Individual must be multi-task orientated and have strong problem-solving skills. Characteristics of a good MIS/Reporting/SalesForce Coordinator include: Interested in technology and new trends, enjoys working with people and computers, detail oriented and organized, logical reasoning processes and maintains composure, desire and ability to learn new processes and procedures, aptitude to learn and use the intricacies of the Salesforce platform and basic network functions such as setting up workstations and printers. Additional skills in listening and reporting design and development are key.

Performance Expectations for this position:

- Manages and maintains the reporting needs and support of the Bank's Salesforce platform
- Provides Administrative support, setup and updates to the Salesforce Platform
- Provides training and education on features and use of the Salesforce Platform
- Provides quality customer service for internal customers;
- Strives for excellence in job performance; and
- Assists in the reduction of errors.

The duties, skills, and requirements outlined in this document represent what is required to perform the essential job functions of this position, however, this document is not to be considered all-inclusive and may be amended at any time at the discretion of management.