St. Lawrence College
Position Description Form (PDF)

Effective Date: 3-May-2023

Campus:	**Tri-campus**
Incumbent's Name:	**Vacant**
Position Title:	**Customer Relationship Management (CRM) Technician**
Payband:	**G**
NOC Code:	
Position Number:	
Hours per Week:	**35**
Supervisor's Name and Title:	**Manager of Business Intelligence**
Completed by:	**John Conrad**

Position Summary

Provide a concise description of the overall purpose of the position.

Reporting to the Manager of Business Intelligence, the CRM Technician role provides technical support for the CRM (Salesforce) within the Department of Innovation and Business Engagement. The incumbent provides administration, system configuration, maintenance, and user support. The incumbent builds, updates and maintains reports, queries, and dashboards; builds, tests, deploys, and updates CRM workflows, custom record types, profiles, and fields; and supports the analysis of data to inform College decision making. The incumbent provides training for new and existing users; and may need to participate in meetings to discuss new processes to be implemented in Salesforce.

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of the Time Annually*
1. User support (30%) • Troubleshooting and solving user challenges, on-boards, and trains users. • Effectively communicates and builds rapport with stakeholders. • Resolves conflicts and issues of medium complexity and escalates others as appropriate.	30
2. CRM administration (45%) • System configuration and maintenance of workflows, record types, profiles, and fields. • Develop customized solutions within Salesforce to support business functions, user requirements, and College goals.	45
3. Data Analysis (10%) • Develops and maintains reports, queries, and dashboards. • Responsible for maintaining database integrity and accuracy.	10
4. Documentation and Communication (10%) • Develops and maintains workflow user guides. • Actively participates in team, project, and stakeholder meetings to ensure accurate and timely delivery of project/task outcomes.	10
5. Other duties as required to support the Department (5%)	5
	100%

* To help you estimate approximate percentages:

½ hour a day is 7%	1 hour a day is 14%	1 hour a week is 3%
½ day a week is 10	½ day a month is 2%	1 day a month is 4%
1 week a year is 2%		

1. Education

A. Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study. Do not include on-the job training in this information.

☐ Up to High School or equivalent   ☐ 1 year certificate or equivalent   ☐ 2-year diploma or equivalent

☐ Trade certification or equivalent   ☒ 3-year diploma/degree or equivalent   ☐ 3-year diploma / degree plus professional certification or equivalent

☐ 4-year degree or equivalent   ☐ 4-year degree plus professional certification or equivalent   ☐ Post graduate degree or (e.g., Masters) or equivalent

☐ Doctoral degree or equivalent

Field(s) of Study:

Marketing or Business Analytics

B. Check the box that best describes the requirement for the specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirements that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

☒ No Additional requirements	No additional educational requirements
☐ Additional requirements obtained by course(s) of a total of 100 hours or less	
☐ Additional requirement obtained by course(s) of a total between 101 and 520 hours	
☐ Additional courses obtained by course(s) of more than 520 hours	

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods, and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of years of experience, in addition to the necessary education level required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or the on-the-job training occurs after the conclusion of the educational course or program.

☐ Less than one (1) year	
☐ Minimum of one (1) year	
☐ Minimum of two (2) years	
☒ Minimum of three (3) years	Experience working with Customer Relationship Management (CRM) and marketing

	automation systems (Salesforce preferred). Experience analyzing data to understand trends and draw insights. Experience with HTML an asset. Strong interpersonal and customer service/relationship skills. Contribute to setting work priorities and supporting the team in achieving operational goals. Identify challenges and opportunities and take initiative to recommend and implement solutions that improve operational effectiveness.
☐ Minimum of five (5) years	
☐ Minimum of eight (8) years	

3. Analysis and Problem Solving

This section relates to the application of analysis and judgment within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgment required to do so.

Please provide up to three (3 examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#1 regular & recurring

Key issue or problem encountered.	Requests for data/reports and associated analysis with short notice.
How is it identified?	Request from project team, project partners, or MLTSD.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes – clarity on the data required and purpose/meaning being sought from the data.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Review of CRM data and functionality to provide proper information in a user-friendly manner.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practice, established standards or guidelines.)	Process guidebooks, CRM tools, Manager of Business Intelligence.

#2 regular & recurring

Key issue or problem encountered.	Business process design and implementation.
How is it identified?	Self-identified, request from project team or project partners.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes – clarity on current process and desired outcome of automation.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Mapping of business process, exploration of CRM tools to support process.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practice, established standards or guidelines.)	Past practice and guidelines.

#3 regular & recurring

Key issue or problem encountered.	Data quality reviews.
How is it identified?	Running CRM reports and dashboards.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes – clarity on the data required and business process.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Review of CRM data, interaction with CRM users, customization of objects' views.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practice, established standards or guidelines.)	Vendor best practices; existing reports and dashboards

#1 occasional

Key issue or problem encountered.	Troubleshoot CRM problems and implement solutions in a timely manner.
How is it identified?	Salesforce error messages or users complain.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes – clarity on the process which presented an error, and its integration/automation.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Reviewing the entire business process, exploring CRM features to debug errors, looking into other software connections to the CRM.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practice, established standards or guidelines.)	Vendor best practices, guidelines, and support centre; cases history, community best practices.

#2 occasional

Key issue or problem encountered.	Business process updates.
How is it identified?	Users' needs, CRM new features releases.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes – clarity on the process as presented by the user, testing new features in a sandbox.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Reviewing the entire business process, and its implications on existing automation; exploring new CRM features.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practice, established standards or guidelines.)	Vendor best practices, release notes, and guidelines; community best practices.

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4.   Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

In the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring to the position, up to two (2) examples that occur occasionally:

#1 regular and recurring

List the project and the role of the incumbent in this activity.	Planning of dissemination/communication of project data to project team, partners, and MLTSD.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Ability to communicate data in written, verbal, and visual forms. Data organization and analysis to ensure data integrity.
List the types of resources required to complete this task, project, or activity.	CRM system, Power BI, SEO optimizer, analytical software.
How is/are deadline(s) determined?	Reporting and meeting requirements of project.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	Incumbent, project manager, Manager of Business Intelligence.

#2 regular and recurring

List the project and the role of the incumbent in this activity.	Coordinating with communications officer on marketing and promotion activities to ensure data tracking of campaigns.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Ability to communicate data in written, verbal, and visual forms. Data organization and analysis to ensure data integrity. Understanding of marketing analytics and data gathering planning.
List the types of resources required to complete this task, project, or activity.	Salesforce, SEO optimizer, marketing automation tools.
How is/are deadline(s) determined?	By project partners, communications officer.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	Communications officer, project manager, MLTSD.

#3 regular & recurring

List the project and the role of the incumbent in this activity.	Perform a CRM Health Check.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Quality management; organization, critical thinking; ability to communicate data in written, verbal, and visual forms.
List the types of resources required to complete this task, project or activity.	CRM system.
How is/are deadline(s) determined?	By the Manager of Business Intelligence.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	Incumbent, Manager of Business Intelligence

#1 occasional

List the project and the role of the incumbent in this activity.	Planning and implementing CRM platform updates.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Research: collaboration, scope management, time management, ability to communicate data in written, verbal, and visual forms.
List the types of resources required to complete this task, project or activity.	CRM release notes; community best practices.
How is/are deadline(s) determined?	By the Manager of Business Intelligence.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	Incumbent, project manager, Manager of Business Intelligence.

#2 occasional

List the project and the role of the incumbent in this activity.	Create an archive of all the system's field history.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Quality management; tracking and monitoring; ability to communicate data in written, verbal, and visual forms.
List the types of resources required to complete this task, project or activity.	CRM system.
How is/are deadline(s) determined?	By the Manager of Business Intelligence.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	Incumbent, Manager of Business Intelligence

5.   **Guiding/ Advising Others**

This section describes the **assigned responsibility** of the position to guide or advise others (e.g., other employees, students). Focus the actions taken (rather than the communication skills) that directly assist others in the performance of their work skill development.

Though support staff cannot formally "supervise "others, there may be a requirement to guide others using the incumbent's job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks. Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

Regular & Recurring	Occasional	Level	Example
☐	☐	Minimal requirement to guide/ advise other. The incumbent may be required to explain procedures to other employees or students	
☒	☐	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete certain tasks	Working with project partners on the use of the CRM; delivered through online or in-person meetings.
☒	☐	The incumbent recommends a course of action or makes decisions so that others	The establishment of CRM business processes.

		can perform their day-to-day activities.	
⊠	☐	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	Supporting team in supporting reporting requirements for government.
☐	☐	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6.   Independence of Action

Please illustrate the type of independence or autonomy exercised in this position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	Occasional (If none, please strike out this section)
Establish a business process within the CRM.	

What rules, procedures, past practices, or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (If none, please strike out this section)
Using past practices of related projects and business processes, salesforce guidelines.	

How is work reviewed or verified (e.g., Feedback from others, work processes, supervisor)?	
Regular and Recurring	Occasional (If none, please strike out this section)
	Review from Manager of Business Intelligence.

Describe the type of decisions the incumbent will make in consultation with someone else other than the supervisor.	
Regular and Recurring	Occasional (If none, please strike out this section)
	Alignment of data and processes with CRM specialists within the College and at partner institutions.

Describe the type of decisions that would be decided in consultation with the supervisor.	
Regular and Recurring	Occasional (If none, please strike out this section)
	Data communication methods for reporting.

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (If none, please strike out this section)
Data analysis, research CRM business process improvement, design new CRM process.	

7.   Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which a position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfill the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency (D,W,M,I)*
How is it received?	How is it carried out?		
Project team or project partners make CRM new field requests, E-mail, meetings.	CRM data analysis delivered by e-mail or during meetings	Project team, project partners, industry, government	D
Reporting on CRM data requests received by Project Manager, Finance Dept, gov't via e-mail or meetings.	Creating or updating reports in the CRM and exporting that to send them through E-mails	Project Manager, Finance Department, government	M
Project team or project partners ask to add new users, E-mail, meetings.	Check existing budget with finance team; order it through CRM platform; communicate users and manager; E-mail	Project team, project partners	I
Manager of Business Intelligence asks for a new CRM user profile; E-mail, meetings	Review of existing profiles and system permissions to clone the best match profile for the need; addition of permission set if necessary	Manager of Business Intelligence	I

* D = Daily   W = Weekly   M = monthly   I = Infrequently

8. **Communication**

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g., exchanging information, formal presentations) and written (e.g., initiate memos, reports, proposals) in the section (s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D,W,M,I)*
Presentations to show data or to explain CRM business processes.	Developing and delivering presentations on project.	Project team, partners, MLTSD	M
Data visualization on project results, project metrics, or CRM business processes.	Using various data visualizations tools to communicate project outcomes.	Project team, partners, MLTSD	W
Written/spoken to explain or instruct	Discussing and describing CRM, data in meetings, via e-mail, on-line.	Project team, partners, MLTSD	D

* D = Daily   W = Weekly   M = monthly   I = Infrequently

9. **Physical Effort**

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, and lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position, or maintaining one position for a long period.

Physical Activity	Frequency (D,W,M,I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1-2 hrs at a time	> 2 hrs at a time	Yes	No	N/A
Sitting – Computer work	D			X	X		
Moving to attend meetings	D	X			X		
Taking notes	D	X			X		

* D = Daily   W = Weekly   M = monthly   I = Infrequently

If lifting is required, please indicate the weights below and provide examples.

☒ Light (up to 5 kg or 11 lbs.)

☐ Medium (between 5 to 20 kg and 11 to 44 lbs.)

☐ Heavy (over 20 kg. or 44 lbs.)

Light lifting carrying is required, when moving a computer monitor, desktop computer, printer.

10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:
- the audio/visual effort and the focus or concentration needed to perform the task and the duration of the task, including breaks (e.g., up to two hrs. at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (e.g., multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Reading/reviewing/scanning/analyzing CRM data.	D			X
Can concentration or focus be maintained throughout the duration of the activity? If not, why? ☒ Usually – with the exception of phone/email interruptions and noise in an office environment. ☐ No				

Activity #2	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Designing, editing, and inputting business processes within CRM system.	D		X	
Can concentration or focus be maintained throughout the duration of the activity? If not, why? ☒ Usually – with the exception of phone/email interruptions and noise in an office environment. ☐ No				

Activity #3	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Listening to, communicating with, and supporting CRM users.	D	X		
Can concentration or focus be maintained throughout the duration of the activity? If not, why? ☒ Usually – with the exception of phone/email interruptions and noise in an office environment. ☐ No				

* D = Daily   W = Weekly   M = monthly   I = Infrequently

11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Conditions	Examples	Frequency (D,W,M,I)*
☒ acceptable working conditions (minimal exposure to the conditions listed below		D
☒ other (explain)	Working with project partners in an on-line environment.	D

* D = Daily   W = Weekly   M = monthly   I = Infrequently