

**VERABANK
JOB DESCRIPTION**

JOB TITLE: Salesforce Support Manager

DEPARTMENT: Information Services

INCUMBENT: _____

SUPERVISOR: Information Services Project Manager

FLSA STATUS: Non-Exempt

DATE: Jan 4, 2023

JOB PURPOSE

Responsible for training and support on the Bank's Salesforce platform including: our lending platform(nCino), Salesforce CRM, and wealth management platform (WealthHub). The candidate will be responsible for communicating ongoing system enhancements and support for employees

DUTIES AND RESPONSIBILITIES

1. End User Training on all new implementations and Projects
2. Identify, diagnose, and resolve end user questions through our ticketing system and escalate up technical issues to Salesforce Admin
3. Super User and Team Lead training on noteworthy system enhancements
4. Recurrent training with individual departments to ensure they are continually using efficient processes to better their department
5. Lead Steering Committees and voting on enhancements
6. Monitor and improve user adoption
7. Working with the Salesforce Admin to create monthly release notes and document system changes for users.
8. Assisting in creating documentation of system support resolutions
9. Maintaining process documents and Job Aids with updates
10. Serve as the liaison between end user feedback and enhancements in the system
11. Attend webinars, training, and conferences to maintain a full understanding of the capabilities and functionality of all applications we use within Salesforce.
12. Maintain compliance with regulations and bank policies.
13. All other duties as assigned

CONTACTS

Daily contact with supervisor, co-workers, other bank departments and managers. Frequent contact with nCino support and sales.

SPECIFIC REQUIREMENTS

1. Bachelor's Degree
2. Excellent interpersonal, leadership, communication, and management skills
3. Ability to work independently and as a team with excellent time management skills

PREFERRED REQUIREMENTS

1. Understanding of banking processes
2. Experience in developing curriculum and training
3. Experience in technical support or Helpdesk environments

PHYSICAL REQUIREMENTS

Office setting with moderately varied desk-oriented activity, with fatigue being relieved by opportunities to stand and move around in a comfortable environment. Repetitive movement of fingers, wrist and hand.

NOTICE

1. This job description in no way states or implies that these are the only tasks to be performed by the incumbent occupying this position. The incumbent will be required to follow any other instructions and to perform any other job-related duties.
2. Requirements are representative of minimum levels of knowledge, skills, and/or abilities. To perform in this position successfully, the incumbent will possess the abilities and aptitudes to perform each task proficiently.
3. Ability means to possess and apply both knowledge and skill.
4. This position description has excluded the marginal or peripheral functions that are incidental to the performance of primary functions. All requirements are essential to the function of the position.
5. This job description describes the minimum selection requirements to qualify for the position. However, promotion and other employment decisions are also based on Bank needs, being in good standing, fully competent performance, and other non-discriminatory issues.
6. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.
7. Some requirements may exclude individuals who pose a direct threat or significant risk to the health and safety of themselves or other employees.
8. This position description does not create an employment contract, implied or otherwise, other than an "at will" employment relationship.

Employee

Department/Division Manager

Date

Date