

Employment Opportunity

## Salesforce & Engagement Manager or Senior Lead

### Position Overview

The Pembina Institute is seeking an experienced Salesforce & Engagement Manager or Senior Lead who fully embraces that the first two words in ‘Constituent Relationship Management software’ concern ‘Constituents’ and ‘Relationships’ in order to drive engagement with our work. Serving as lead Salesforce administrator you will support a complement of about 50 staff in varied roles with managing their engagement. You will ensure that we are capturing and leveraging the best possible data about our constituencies in order to fulfill our mission of advancing a prosperous clean energy future for Canada.

Reporting to the Director of Strategic Partnerships, the successful candidate will be responsible for helping staff across the entire organization get the most out of Salesforce and its integrations to related systems. You will:

- Act as a supporter and translator of staff needs with respect to how they are engaging with their varied constituencies, whether that engagement is 1:1 or on a broader scale
- Produce reports that help keep staff informed on the key indicators they need to know to be successful
- Be hands-on with the data and its users — both training staff on how to enter well and making sure they are doing so — and handling mass scale import/export where needed
- Steward the system through all required upgrades and be responsible for both making the case and leading the change when a new feature, integration, or extension of the platform would benefit the organization

To thrive in this role you will need to be passionate about how to best support staff members with highly varied needs and abilities in leveraging this technology for good. We need smart and creative people who are driven and resourceful. Relevant technical experience with Salesforce, Pardot, and/or the Nonprofit Success Pack/Causeview, very strong communication skills, a solid work ethic, the ability to thrive with limited supervision while still being highly collaborative, and a good mix of tenacity and flexibility will all be key traits needed for success.

### Why the Pembina Institute?

The Pembina Institute is a national non-partisan think tank that advocates for strong, effective policies to support Canada’s clean energy transition. Through research, consulting and

convening, we employ multi-faceted and highly collaborative approaches to change to reduce the environmental impacts of energy production and use.

Our people are passionate about sustainability and dedicated to enabling positive social change. Our organizational culture encourages creativity and collaboration, and we offer a flexible and fast-paced work environment that rewards honest character, personal initiative and innovation. The successful candidate will join our dynamic team of nationally recognized professionals working on delivering clean energy solutions into the hands of Canada's decision makers and key influencers.

## Our core values

Climate change threatens everyone. We must come together to evolve how energy is created and consumed through solutions based on equity, curiosity, evidence-based thinking and practicality.

## Roles and Responsibilities

- Provide direction on the best use of Salesforce and lead on its reconfiguration to support the org's strategic goals
- Lead or supervise the rollout and integration of new features and steward the org through all regular upgrades
- Assess, rollout, and troubleshoot all integrations (at present: Causeview, Sage Intacct, Pardot with SSO via O365) and add-on apps (DupeBlocker, Rollup Helper)
- Monitor usage to ensure appropriate uptake and utilization of the system
- Directly support staff who are engaging with constituents to better empower and coordinate their outreach and engagement efforts
- Directly manage staff and interns employed to assist in a support capacity with either data management, mass email outreach and/or analytics
- Conduct mass email sends via Pardot in both a back-up capacity and as lead when the send is complex and/or sensitive
- Support the review and optimization of deliverability rates for such outreach
- Facilitate the migration of large quantities of data into our information systems and between these systems, e.g. bulk mailing software, industry databases
- Maintain a weekly schedule for data clean-up and maintenance to ensure high level of data integrity (removing duplicate records, data back-ups, deletion flags, etc.)
- Identify opportunities to update existing data, coordinating with staff and assisting where necessary on the addition of new data
- In collaboration with the Operations Manager, design organization-wide policies and procedures for capturing, utilizing and maintaining up to date information related to

our constituents; fully document the current state operations and all evolutions in the use of Salesforce

- Conduct one-on-one and small group training for new Pembina staff, as well as “refresher” and “advanced” sessions for existing staff on an on-going, as-needed basis
- Develop, troubleshoot and refine reports and dashboards and provide advanced reporting where necessary

The position can be based out of our Toronto, Edmonton, Calgary or Vancouver offices as long as your work hours result in sufficient availability to staff across these time zones.

## Skills and Qualifications

Candidates must clearly reflect the following skills and experience in their application.

Candidates may also wish to provide examples of additional qualifications and describe how they would apply these in a role at the Pembina Institute.

- Minimum of an undergraduate degree or post-graduate certification in computer science, information management, data science, digital marketing, mass communication, or related field
- A minimum of three years of work experience as the lead Salesforce admin, preferably in a non-profit or charitable organization
- Certified Salesforce Administrator with experience of both the Classic and Lightning interfaces
- Demonstrable ability with the development and management of standard and custom objects; Flow / workflow; report and object formulas; permission sets and profiles/roles
- Excellent data manipulation, deduplication, and analysis skills
- Skilled with intermediate level HTML and CSS
- Direct experience with Google Analytics and UTMs
- Experience with vendor assessment and management
- Strong interpersonal and communication skills (oral and written) and a proven ability to work collaboratively
- Demonstrated commitment to sustainability and social change through educational, professional and/or volunteer experience
- Self-motivated and results-oriented, with the ability to take initiative and work independently with minimal supervision

## Other Valuable Qualifications

- Knowledge of the challenges and opportunities in Canadian environmental and climate policy

- Strong knowledge of the charitable sector and the regulatory and funding environment it operates within. Direct experience with grant applications and management and charitable receipting will be significant assets.
- Experience with either Pardot or Marketing Cloud and with the Nonprofit Success Pack
- Experience with Causeview and/or other donation or payment processing apps and integrations
- Experience and ability with Visualforce and Apex and the Salesforce mobile app
- Experience in a Microsoft Teams environment
- Project management skills

## Compensation and Benefits

The salary rate is competitive for the environmental non-profit sector and will be based on skills, experience and qualifications of the successful candidate. Benefits include:

- extended health and dental
- four weeks of holidays per year
- flexible work hours — we understand our staff may have important personal and community commitments, and we strive to create a flexible environment that accommodates their needs
- strong growth potential in an entrepreneurial business environment
- employer contributions to RRSP plan
- training and development opportunities

Further terms of employment will be discussed with candidates during the interview process.

This full-time (40 hours per week) position may require travel. While we collectively live through the effects of COVID-19, we have set up protocols to support employees to work remotely. We will maintain flexibility and creative delivery of our services while following all directives provided by government health authorities.

## To Apply

Email your cover letter and resume to [careers@pembina.org](mailto:careers@pembina.org). Please ensure the following:

- Subject line includes Salesforce & Engagement Manager or Sr Lead and your last name
- Cover letter (max. two pages) explains why you are interested in working with the Pembina Institute and how your skills and qualifications meet the criteria outlined for this position
- Resume outlines your relevant skills, education and experience
- Cover letter and resume are saved as one PDF document using the naming convention lastnamefirstletter-application-position-year.pdf
  - example: smithm-application-Salesforce-Engagement-Manager-SRLead-2022.pdf

**Application deadline:** The posting will remain open until it is filled.

*The Pembina Institute is an equal opportunity employer. We thank all applicants for their interest but only those selected for an interview will be contacted.*