Salesforce Implementation & Delivery Manager

(6 Month Fixed Term Contract)

Job Description

Organisation: [Access – The Foundation for Social Investment](#)

Reports to: CRM Project Manager

Location: Remote working with ideally **one day per week (Tuesday) in the London office (Old Street)**

Salary: £45,061-£52,884 per annum pro-rata

Hours: Fixed-Term Contract (6 months minimum); Full-time preferred (we are also open to 4 days per week)

Closing Date / Interviews: We are interviewing on a rolling basis

About Access

Access – The Foundation for Social Investment works to ensure that charities and social enterprises can access the finance they need to sustain or grow their impact.

Access is currently implementing a new CRM and Grant Management System (Salesforce-based, delivered by implementation partner Vera) to support its programmes, partner relationships, and reporting needs. This role will play a critical part in ensuring the system is delivered well and that Access is ready to operate it confidently at go-live.

Position Overview

Access is seeking a **Salesforce Implementation & Delivery Support** on a fixed-term basis to support the delivery of its Salesforce-based CRM and Grant Management System.

Reporting to the Project Manager, this role will combine:

- **strong project coordination and delivery management**,

- **hands-on Salesforce CRM expertise**, and

- **practical change management capability** to help staff adapt to new systems and ways of working.

As Access does not have Salesforce expertise in-house, this role will act as a **key internal point of reference**, helping to review and sense-check design decisions, manage delivery risks, and ensure that the system being built is usable, well understood, and ready for go-live.

This is **not a developer or Salesforce Administrator role**, but it **does require strong Salesforce CRM experience**, alongside proven ability to support users through change, structure complex projects, and keep delivery on track. The role will continue through early post–go live to support transition into business-as-usual and handover to the incoming System Administrator.

Key Responsibilities

Project Coordination & Delivery Support

- Coordinate meetings, diaries, agendas, notes, and follow-up actions across Access and the implementation partner.

- Maintain clear and up-to-date project documentation, including decisions, risks, issues, and agreed actions.

- Track progress against milestones and deadlines, highlighting risks, dependencies, and gaps early.

- Prepare materials for workshops and meetings, including draft process maps, requirement summaries, and testing plans.

- Support the Project Manager in organising and running the CRM Implementation Group.

Salesforce and CRM Design Review & Sense-Checking

- Act as an informed internal voice on Salesforce CRM best practice during design and delivery discussions.

- Review proposed Salesforce designs alongside the CRM Project Manager

- Sense-check designs for usability, scalability, data quality, and longer-term supportability.

- Ask informed, constructive questions where designs appear overly complex, unclear, or risky.

- Translate Salesforce concepts and decisions into clear, practical explanations for non-technical colleagues.

- Help ensure that Access' operational processes, reporting needs, and partner journeys are accurately reflected in the system.

Data Migration Support

- Lead and coordinate data migration activity on Access' side, using Salesforce best practice.

- Work with the programme team to gather, clean, structure, and validate data ahead of migration.

- Review data quality and flag risks or gaps early.

- Work closely with the implementation partner to test data mappings, review trial loads, and resolve issues.

- Support decisions on data definitions, quality thresholds, and what data should be migrated or archived.

User Acceptance Testing

- Plan and coordinate user acceptance testing focused on real-world Salesforce user journeys

- Prepare and review test scripts aligned to agreed requirements.

- Coordinate testers, log issues, and track resolution through to closure.

- Support the Project Manager in confirming Salesforce readiness for go-live.

- Develop and deliver end-user training programme

Early Post–Go Live Support and Handover

- Support the early post–go live period, helping to identify, prioritise, and triage Salesforce issues.

- Work alongside the incoming System Administrator to transfer knowledge and context.

- Document key Salesforce configuration decisions, known limitations, and areas of technical debt or risk.

Experience and Skills

Essential

- **Strong, hands-on experience with Salesforce**, and preferably with other CRM systems, ideally in a delivery support, or implementation support role.

- Demonstrable experience supporting **change management**, user adoption, or organisational change linked to new systems or processes.

- Practical understanding of Salesforce data models, standard objects, custom objects, page layouts, permissions, validation rules, and basic automation.

- Experience supporting or coordinating CRM or system implementation projects.

- Experience coordinating or supporting data migration into Salesforce.

- Experience supporting system testing, go-live, or hypercare phases.

- Confidence reviewing Salesforce designs and challenging implementation partners or vendors constructively.

- Strong project coordination skills, with excellent organisation and attention to detail.

- Ability to communicate clearly with both technical specialists and non-technical colleagues.

Desirable

- Experience with Experience Cloud or partner/community portals.

- Familiarity with grant management, case management, or nonprofit CRM use cases.

- Experience working in the charity, social enterprise, or public benefit sector.

- Experience contributing to change management activity during CRM or systems implementations, particularly around user adoption, process redesign, data readiness, and cross-organisational engagement.

Success Measures

- Salesforce design and delivery decisions are well understood, reviewed, and appropriate for Access' needs.

- Data migration into Salesforce is well managed, with minimal issues at go-live.

- Risks and design concerns are identified early and addressed effectively.

- The Project Manager is supported by a knowledgeable Salesforce practitioner and able to focus on leadership and stakeholder engagement.

- Access is well prepared for go-live, with a smooth transition into post–go live support and administration.

How to Apply

Please submit your CV and a short covering note (max 2 pages) outlining your relevant experience and availability to info@access-si.org.uk

Applications will be reviewed on a rolling basis. We expect the interview process to be one remote interview.

Terms and Conditions and Benefits (6-month contract):

Terms and Conditions
- This role attracts a salary of £45,061-£52,884 per annum, based on 1 FTE
- Probationary period is one month
- Notice period one month (on completion of probationary period)

Benefits
- 15.5 days annual leave in addition to bank holidays (pro-rata for part-time employees)
- Contributory pension (employer contribution of 8% dependent on 4% contribution from employee via salary sacrifice)
- Income protection and life insurance
- Personal mobile phone usage and working from home allowances

Other Benefits
- Bright, modern office in central London location
- Opportunity to allocate 2.5 working days to volunteering
- Opportunity to attend conferences and events within the social investment ecosystem.

Equal Opportunities

Access is committed to a policy of Equal Employment Opportunity and is determined to ensure that no applicant or employee receives less favourable treatment on the grounds of gender, age, disability, religion, belief, sexual orientation, marital status, or race, or is disadvantaged by conditions or requirements which cannot be shown to be justifiable.

We are committed to being an inclusive organisation and actively promote equality of opportunity for all. We believe in the value of a diverse workforce and encourage applications from individuals with a wide range of backgrounds, experiences, and perspectives. Selection for roles is based solely on individual merit, talent, skills, and potential.

As a charity, we are dedicated to reflecting the communities and individuals we aim to support. We particularly welcome applications from candidates who share lived experiences or come from backgrounds that align with those we serve. Diversity strengthens our ability to make a meaningful impact, and we encourage all who feel passionate about our mission to apply.