



## JOB DESCRIPTION

**Job Title:** Business Systems Project Manager      **Reports to:** VP, Chief Financial Officer

**Salary Grade:** TBD      **FLSA Status:** Exempt

**Location:** Raleigh Main Office/Hybrid Remote (Based in North Carolina)      **Revised:** September 2022

**Who we are:** Carolina Small Business Development Fund (CSBDF) is a nonprofit and certified community development financial institution (CDFI). We are passionate and committed to providing support to small businesses across the state. Our Mission is to foster economic development in underserved communities by providing capital, business services, and policy research to support small businesses. CSBDF provides assistance to small business in four major ways: as a partner, as a trusted guide, as an advocate for small businesses, and as an accessible funding source. Our work supports our vision to create economic opportunity for all people.

**Nature of Work:** As a nonprofit 501(c)3 financial organization, CSBDF deals with large amounts data related to our lending operations, grant programs, and policy research. As demand for our services has grown, we've made increasing use of technological efficiencies to better serve the state's entrepreneurs. The incumbent will work with members of CSBDF's executive leadership team to increase organizational efficiencies and improve business processes across our technology systems and databases. Your primary responsibility will be to aid in the centralization management of all IT services for the organization. The position will act as the primary point of contact and coordinator for all projects related to CSBDF's customer relationship management (CRM) software and enterprise data systems. In order to support that transition, this person will work with IT consultants to implement a high-tech infrastructure that will support the organization's rapid growth, business operations, and maintain security. This includes, but is not limited to: software integrations, vendor management, and leading departmental business process improvement initiatives that leverage technology systems. The Business Systems Project Manager should play a leading role in our digital transformation journey and be the change agent for our data-driven organizational culture.

**Supervision Received/Exercised:** Works under the general supervision of the VP, Chief Financial Officer and has no direct supervisory responsibilities.

**Essential Job Functions:** *The following duties ARE NOT intended to serve as a comprehensive list of all duties performed by all employees in this classification. Shown are duties intended to provide a representative summary of the major duties and responsibilities. Incumbent(s) may not be required to perform all duties listed and may be required to perform additional, position-specific duties.*

### IT Functional Area:

- Leads the Information Technology (IT) function by working with contractors of an amazing nonprofit.
- Assists additional functional teams with the usage of database systems for respective needs.
- Provides project oversight for any initiatives that involve system enhancements to include Salesforce (SF) and TEA. and others.



## Job Description – Business Systems Project Manager

- Establishes the procedures necessary for the IT function to support the organization, such as onboarding, security, updates and patches, and change management.
- Sets standards for hardware, software, and services, such as the basic configuration for a new user's computer and manages vendors accountability.
- Develop and implement procedures and policies for effective and secure data management across our integrated platforms.
- Collaborate with CSBDF Salesforce CRM (Customer Relationship Management) contractual support.
- Executes and extends CSBDF's comprehensive IT strategy, including creation of project plans, time schedules, equipment and cost estimates for short, medium, and long term application.
- Develops and maintains CSBDF's systems as well as its mobile communication infrastructure.
- Monitors trends, emerging technologies, issues, and approaches in CDFI information technology to proactively innovate.
- Other duties as assigned.

### *Finance/Fiscal Team Functional Area:*

- Sufficient familiarity with Salesforce CRM systems to execute entry-level administrative tasks under the guidance of CSBDF's contracted Salesforce Administrator. This includes an ability to create easy to moderate level complexity reports and dashboards.
- Comfortable working with vendors to create, implement, and monitor staff training on CRM and enterprise systems, with a focus on using methods that are effective when dealing with non-technical staff.
- Proactive monitoring of CSBDF's technology software vendors and consultants including proposing contract extensions and coordinating CRM and enterprise database software purchases.

### *Human Resources Functional Area:*

- Collaborate with Human Resources to store and protect employee data for the HRIS (Nextep).
- Coordinate with and support functions of development, marketing and communications and programs across CSBDF for data extraction, analysis, reports, and internal technical support.

### **Qualifications:**

#### *Experience:*

- Bachelor's degree in business, information technology, or a related field.
- 1 to 3 years of project management experience, especially in the area of managing customer relationship management systems (CRMs) and databases.
- Any combination of experience and training that can be considered equivalent to the education preference.
- Project management professional (PMP) certification is desired by management, but not required.

#### *Knowledge:*

- Able to draw from a breadth of knowledge on enterprise technology to research technology options and recommend software solutions for purposes of business process improvement.



## Job Description – Business Systems Project Manager

- Deep understanding of how technological improvements can improve organizational performance and create efficiencies in nonprofit business processes.
- Proven experience in data management or analysis.
- Strong knowledge of Microsoft client and server software, network technology (WAN, LAN WLAN, VPN), cloud-based services such as Salesforce and Office 365, PC and Mac desktop and laptop computers, Android and iOS mobile operating systems, and audio/video conferencing services.

### *Skills/Abilities:*

- Able to serve as subject matter expert on business process technology questions for purposes of audits and compliance reporting.
- Ability to translate complex problems clearly and in nontechnical terms.
- Able to negotiate on CSBDF's behalf to ensure the organization receives favorable terms for CRM and enterprise software contracts, renewals, and purchases.
- Strong communication, organization, and detail-orientation skills.
- Maintains confidentiality in processing sensitive client information using discretion and tact.
- Maintains and supports a shared collaborative team culture in person and virtually.
- Ability to meet reasonable deadlines and prioritization of workflow within a changing and fast paced work environment.
- Comfortable interacting with people of different social, economic, and ethnic backgrounds.

### **Physical Demands:**

Work is principally sedentary but may involve some physical exertion during the course of normal work activities, and travel to meetings, conferences or workshops in other cities. As an exempt employee, extended hours may be required on a frequent basis.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Work Environment:**

Work involves the normal risks or discomfort associated with a standard office environment and is usually in an area that is adequately heated, lighted and ventilated.

### **Compensation:**

We offer a competitive salary that depends on prior experience. Our benefits package includes Medical, Dental, Vision, Short Term Disability, Long Term Disability, 401k Account with employer match, plus generous vacation and sick time.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.