



## JOB DESCRIPTION

**Job Title:** Business Systems Administrator

**Reports to:** VP, Business Solutions

**Salary Grade:** 11

**FLSA Status:** Exempt

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

**Revised:** May 2024

**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 businesses 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 have 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. 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 function, this person will work with IT consultants to implement a high-tech infrastructure that will support the organization's 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.

**Supervision Received/Exercised:** Works under the general supervision of the VP, Business Solutions 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.*

**Business Systems/IT Functional Area:**

- Develops and executes CSBDF's comprehensive business systems strategy, including creation of project plans, time schedules, system integrations, data analytics, and cost estimates aligned with CSBDF's strategic plan.
- Play a key role in bridging the gap between business needs and technology solutions within the organization by interviewing and collaborating with various stakeholders.



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- Establishes the procedures and policies necessary to support the organization, such as effective and secure data management across our integrated platforms.
- Provides project oversight for any initiatives that involve system enhancements. As an example, Salesforce (SF), TEA and any other approved system.
- Monitors trends, emerging technologies, and issues in the CDFI industry to further enhance the business systems and technology.
- Analyze internal processes and data to identify opportunities for continuous improvement with a focus on efficiency.
- Proactive monitoring of CSBDF's technology software vendors and consultants including proposing contract extensions and coordinating CRM and enterprise database software purchases.
- Design and facilitate internal training that empowers business users as necessary.
- Other duties as assigned.

### ***Qualifications:***

#### *Experience:*

- Bachelor's degree in business, information technology, or a related field or any combination of experience and training that can be considered equivalent to the education preference.
- At least 2 years of project management experience, especially in the area of managing customer relationship management systems (CRMs) and databases is preferred.
- Experience creating and implementing plans necessary for identifying a company's needs, delivering the best results, and improving the efficiency and effectiveness of operations.
- A good understanding of loan operations and banking/lending processes is preferred.
- Project management professional (PMP) certification is desired by management, but not required.
- Sufficient familiarity with Salesforce CRM systems to execute entry-level administrative tasks. This includes an ability to create easy to moderate level complexity reports and dashboards.

#### *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.
- 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, cloud-based services such as Salesforce and Office 365, PC and Mac desktop and laptop computers.

#### *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.



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- 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 normal work activities, sit or stand for extended periods of time, squat, kneel, stoop, regularly use fingers, hands for computer work, 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.

Equal Opportunity Employer, including disabled persons and veterans.