Role title: Project Coordinator & CRM Salesforce Associate
Location: Currently home working due to Covid, usual office location London Bridge
Reporting to: Head of Development
Start Date: ASAP
Term: Permanent

Organisation
Carbon Tracker Initiative is an independent financial think tank that carries out in-depth analysis on the impact of the energy transition on capital markets and the potential investment in high-cost, carbon-intensive fossil fuels. We believe that financial markets, regulators, investors and policymakers all have an urgent role to play in guiding the world to a climate-secure energy system. Carbon Tracker’s analysis of ‘unburnable carbon’, ‘stranded assets’, and ‘wasted capital’ has reframed the debate around climate change risk.

Role overview
This role is a hybrid and comprises of two parts, both of which require excellent project management skills and interfacing with internal and external stakeholders.

Role and responsibilities

Research Production
Pivotal role in our production process, in collaboration with Communications, Investor Outreach and Research teams internally and with external partners including our funders. To ensure the efficient executive of all our research output, reports, notes and blogs.

- Assist and support the Head of Development across all aspects of Research - Planning, Operations and Admin activities.
- Facilitate and coordinate the production process with team and suggest improvements, implement changes including overseeing and co-ordinating timelines. Communicating internally with team on process updates.
- Work with our external partners to ensure the production process is efficient, clearly set the deliverables and manage the structure, timelines, roles and responsibilities, schedule proactive follow-ups and positive sustained communication between all parties.
- Work with team internally to ensure partnership process is adhered to.
- Utilise first class project management skills to effectively plan our research executive including identifying dependencies, risks, issues and contingencies.
- Work with senior stakeholders (internally and externally) to ensure smooth implementation and management of project delivery, timelines and processes, provide support, advise and guidance to ensure the best outcomes.
- Host production calls with research, outreach and comms teams, maintain and update the production schedule of individual projects, co-ordinate and facilitate with teams internally and externally and provide regular updates.
- Create and maintain a stakeholder management plan/production scoping document

Salesforce CRM (Client relationship management)
The second responsibility within the role will include the project management and further development of Salesforce, which is used for our contact relationship and distribution including our media and external investment outreach activities.

Working closely with fundraising, research, investor outreach, comms teams, and our senior management team. This role is part technical project manager, part administrator, part Salesforce analyst. Must have a passion for Salesforce and an ability to understand how we can best utilise the tool to achieve our important mission.

- Serve as primary contact for Salesforce internally.
- Responsible for full cycle of gathering requirements, project managing, backend configuration, implementing changes and improvements, administration, training and supporting the team, creating quick reference guides, responsible for ensuring team compliance, reporting and analysis, identifying and fixing issues.
- Manage SF data and analysis reporting, input into how to enhance and leverage to increase our target audience impact.
- Handle all basic administrative functions and co-ordinate and interface with different teams including updating the data base and removing duplicate entries on a regular basis, user maintenance, modification of page layouts, generation of reports and dashboards, creation of new fields and other routine tasks.
- Gather detailed requests for improvements or changes to the system and implement these changes as appropriate.
- Liaise with external SF consultants, technical experts for specific implementations.
- Automate processes using Salesforce tools such as process builder, approval processes, validation rules and features such as engagement plans and levels.
• Manage Salesforce effective integrations with Twitter, LinkedIn, Zoom, Outlook calendars etc.
• Identify, install and maintain appropriate apps from the AppExchange for event management, mass email, donation handling, and more.
• Plan ahead for upgrades, seasonal releases and long-term projects.

Skills, Experience and Attributes Required
• Minimum of three years’ experience within project and process management coordination role.
• Preferably within distribution of research or content.
• Excellent project management skills, a practical and proactive approach.
• Experience in a deadline orientated environment.
• Strong multitasking and reprioritisation experience.
• Creative and analytical thinker with strong problem-solving skills.
• Critical thinking to evaluate multiple sources of information and reconcile conflicts.
• Ability to understand and articulate complex processes.

• Experience within a CRM/Salesforce administrator and project coordinator role.
• Experience in requirements gathering for a CRM and integrated systems.
• Strong understanding of CRM/Salesforce platform, best practices and functionality preferred.
• Salesforce certification preferred, but not essential.

• Passion for our mission.
• Positive attitude.
• Strong attention to detail.
• Organised and process orientated.
• Passionate about CRM/Salesforce.
• Excellent communication skills both verbally and in writing demonstrated across all levels.

Package
• GBP £30,000.00 - £35,000.00 dependent upon experience, 7% pension contribution, 25 days holiday including bank holidays with one extra day granted for service, capped at 5, cycle to work scheme, discretionary bonus (funding and company performance dependent).

Applicant information
• The closing date for applications is Friday 16 July 2021.
• Please email your CV along WITH A COVERING LETTER explaining how you would fit into the team to careers@carbontracker.org and include the FR0002 within the email title.
• Applications without a covering letter will not be considered.
• Carbon Tracker can only consider candidates who are eligible to work in the UK.
• We strive to ensure that opportunities to work and develop at Carbon Tracker are open to all. We welcome applications from all qualified applicants, regardless of age, disability, gender identity or gender expression, race, ethnicity, religion or belief, sex, sexual orientation and all equality characteristics.
• Carbon Tracker supports flexibility and we welcome career returners.
• Thank you for your interest in Carbon Tracker and good luck!

GDPR Disclaimer
Carbon Tracker will process any data provided in response to this open role for recruitment purposes only. We will hold personal data on candidates in our applicant tracking system which is fully compliant with current GDPR legislation until our open role is filled. We cannot state the exact time period for this because it varies role to role. The period is over when a candidate accepts our job offer and starts in the new role. When that period is over we will delete your data. You have the right to lodge a complaint about the way we handle your data with the Information Commissioner’s Office (ICO) or you can contact us directly if you have any concerns you would like to discuss.