



Salesforce CRM Committee Member

The committee member role is a volunteer position that holds no voting rights.

Term (1) year

Qualifications:

The Salesforce CRM Committee Member has demonstrated a willingness and enthusiasm to work towards the mission of Women & Hi Tech. She/he has demonstrated the ability to positively influence others and the proven ability to solicit and obtain substantial financial contributions. She/he has demonstrated knowledge of the STEM community and its changing needs.

Each committee member should either have experience with Salesforce or be willing to complete self-guided online training to complete basic user functions.

All committee members shall be a member of Women & Hi Tech in good standing at the time of initial voting and must remain in good standing throughout their tenure.

Time Commitment:

The committee should plan to meet as an entire committee for 2 hours every month. Typically these occur on Wednesday mornings at Salesforce Tower (downtown) and can be joined remotely. During these meetings, committee members will see what has been built and provide feedback on the areas of the system they tested since the last time we met.

- Requirements for all committee members from August 1-December 31
 - The committee should plan to meet as an entire committee for 2 hours every month. Typically these occur on Wednesday mornings at Salesforce Tower (downtown Indianapolis) and can be joined remotely.
 - During meetings, committee members will see what has been built and provide feedback on the areas of the system they tested since the last time we met.
 - The committee should plan to spend at least 1 additional hour meeting with specific stakeholders throughout the month to advance details not fully vetted in the committee meetings.



- The committee should plan to spend 1-2 hours independently in the system each month, testing what has been built and documenting notes on future enhancements.

Business Analyst (additional 4 hours per month)

- Work with CRM project manager to prioritize user stories against planned phased launches
- Document and clarify CRM user stories for the Salesforce Administrator
- First tester of the CRM, completing at least 1 round of testing before SMEs begin testing
- Attend committee meetings in-person or via phone
- Meet with specific stakeholders to advance details not fully vetted in the committee meetings
- Testing what has been built in the CRM each month and document notes on future enhancements

Salesforce Administrator

- Build the CRM according to the specifications documented in the user stories collected by the Business Analyst
- Attend committee meetings in-person or via phone

