



## SALESFORCE TRAINING CONSULTANT

Posted: September 25, 2018

A City of Philadelphia AmeriCorps initiative

### About PowerCorpsPHL

PowerCorpsPHL is a City of Philadelphia AmeriCorps initiative, operated in partnership with EducationWorks. Working closely with Philadelphia Parks & Recreation, the Philadelphia Water Department, and partners in the public and private sector, PowerCorpsPHL builds opportunities for young people to create promising futures by tackling pressing environmental challenges and developing the skills required to secure meaningful work.

PowerCorpsPHL enrolls disconnected young adults and returning citizens in full-time AmeriCorps service as the strategy to provide career-connected education and paid, work experiences that support Philadelphia's environmental stewardship, youth violence prevention, and workforce development priorities.

Designed as part of the career pathway continuum, PowerCorpsPHL intentionally partners with existing service providers, regional industry, and local government agencies to provide clients with the "last step" needed to achieve self-sufficiency and unsubsidized, long-term success. The PowerCorpsPHL model works to reduce structural barriers hindering an individual's success while supporting young people directly to chart a path forward, engage in the work of personal growth, and cultivate a positive network of support. Through career-connected education aligned to industry standards and work experiences that simulate industry expectations, PowerCorpsPHL provides young people with authentic opportunities to hone career-specific skills. To support long-term success, the initiative phases its interventions and extends its connection to individuals and partners from initial recruitment to well into the career pathway.

### Project Overview

PowerCorpsPHL seeks a consultant to provide training to staff on the use and functionality of our program-wide Salesforce database. PowerCorpsPHL is specifically interested in developing and providing the following types of staff training opportunities:

#### 1. Salesforce Fundamentals Workshops

These workshops are designed for all staff to be provided at the point of on-boarding with materials available as needed for reference and self-review. Topics to be covered include but are not limited to:

- General database logic and functionality
- Identification and navigation of PowerCorpsPHL database features
- Mobile-interface navigation
- FAQs and most-used applications

#### 2. Intermediate-Level Training Customized for Specific Teams or Roles

These workshops are designed to review team- or role-specific uses of the PowerCorpsPHL database and address common troubleshooting questions. Topics to be covered include but are not limited to:

- Data-entry must-knows and batch entry processes, if applicable
- Reviewing and pulling data in Views
- Utilizing existing Reports

Operated in  
partnership with



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EducationWorks.org  
powercorpsphl.org

### 3. Administrator Training for Database Managers

These workshops are designed for 1-3 key staff who will manage the database and fulfill database administrator functions. Topics to be covered include but are not limited to:

- User management
- Field and dropdown item edits and additions
- Custom Report building

### **Expected Tasks and Products**

1. Review existing database and meet with staff to understand program operations and needs.
2. Draft training outlines with suggested format and frequency for each set of topics.
3. Develop materials for each set of training topics.
4. Deliver Fundamentals training to all staff.
5. Deliver customized intermediate training to each staff team.
6. Deliver specific training to Database Managers.
7. Evaluate effectiveness of trainings.
8. Provide “office hours” for user questions and on-call training, as needed.
9. Provide training materials and curriculum for ongoing organizational use.
10. Make recommendations for ongoing staff training practices.
11. Provide refresher or train-the-trainer workshops, as needed.

### **General Timeline\***

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|-------------------------------------|---|
| • By week of November 5, 2018:      | Project Kick-Off                              |
| • By week of November 26, 2018:     | Complete deliverables #1 and #2               |
| • By week of December 17, 2018:     | Complete deliverables #3, #4, and #7          |
| • By week of February 4, 2019:      | Complete deliverables #5, #6, #7, #9, and #10 |
| • December 1, 2018-August 20, 2019: | #8, as needed up to 4 hours/week              |
| • February 4-August 20, 2019:       | Complete deliverable #11                      |

\*Subject to change based on finalized scope of work

### **To Apply**

Please email a project proposal to [PowerCorpsPHL@educationworks.org](mailto:PowerCorpsPHL@educationworks.org) that includes:

- A proposed plan of action
- Initial timeline for each task/activity
- Estimate of costs
- Summary of qualifications or resume

### **Questions**

Please direct any questions to Julia Hillengas at [juliahillengas@educationworks.org](mailto:juliahillengas@educationworks.org).