Title: Data & Customer Success, Senior Specialist	**Reports to:** Director of Product, HomeKeeper
Department: HomeKeeper Team	**Status:** Full-time, Exempt

About Us

Grounded Solutions Network is the nation's largest network of practitioners and advocates working to expand the shared equity model and other innovative frameworks that ensure housing remains affordable for generations to come. Our mission is to create a future in which all people have access to homes they can afford in equitable communities of opportunity that foster better health, academic, and economic outcomes.

As a national membership organization, we support nonprofit and government practitioners, community resident leaders, advocates, elected officials, and other housing professionals with the tools and knowledge they need for success. We promote the creation and preservation of quality housing that remains affordable for generations. Our work specifically targets creating and expanding housing with lasting affordability, using a racial equity lens.

Grounded Solutions is committed to fostering an organizational culture rooted in critical thinking and consciousness about race and class. We seek candidates who are dedicated to achieving racial equity as both a process and outcome. We are committed to building a staff team that is as racially and culturally diverse as the communities that we serve. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.

HomeKeeper is a Salesforce-based platform operated within Grounded Solutions that enables nonprofits to manage programs, measure impact, and contribute to a National Data Hub. Serving 240+ participating organizations across the country, including Shared Equity homeownership programs, multi-service organizations, community land trusts, and housing counseling agencies, HomeKeeper provides essential evidence-based frameworks that help homeownership programs understand why their programs work and then enable them to share and scale best practices.

About the Position

The Data & Customer Success Senior Specialist (DCSS) is the heart of the HomeKeeper's user exprience. The DCSS will take the lead in protecting and growing the value each customer organization gets from the platform with a specific focus on supporting the growth of data-informed organizations. This role tackles three objectives: technical Salesforce support, hands-on data quality diagnosis, and relationship-driven customer success. The goal of the DCSS's objective is to enable organizations to take full ownership of their data. A strong candidate for this role is excited to investigate why data may be incomplete or unreliable, identify trends and patterns in data through analysis, and is excited to

develop implementation and quality assurance plans and build trusted relationships with users. This role will be an integral part of the team that ensures a successful and sustainable implementation of HomeKeeper.

Primary responsibilities are:

1. **Successful User Onboarding (40%)**
    - Lead technical discovery, onboarding, and implementation planning for new HomeKeeper users to support the successful adoption of a user base with varying Salesforce familiarity and skill.
    - Engage with users so they fully understand in their program's design, business outcomes, and goals, assisting users in identifying the best ways to support their priorities, digitize their workflows, and measure their impact.
    - Work with team to develop and share product customizations and deployment tools to create standardized configurations for participating organizations.
    - Complete simple data migrations and report configurations to ensure smooth transitions to HomeKeeper.
2. **Oversee Support Pipeline (20%)**
    - Work with the Director of Product to establish and maintain a technical support structure, exploring innovative ways to provide support to our growing user base, including in-app assistance, AI-assisted analysis, and other emerging technology.
    - Oversee support pipeline alongside partners, answering Tier 1 and Tier 2 tickets by identifying issues, gathering information, resolving user issues, standardizing responses, triaging support, and escalating Tier 3 tickets to the Product and Development team.
    - Contribute to the Knowledge Center in collaboration with the User Experience & Learning team.
    - Log all resolved issues in a structured, categorized format, including those resolved outside formal tickets, to support pattern analysis over time.
3. **Support Product Development (20%)**
    - Review user feedback and identify patterns to assist with product prioritization and supporting the Director of Product in roadmap management and feature development.
    - Write, edit and produce technical documentation and other resources for users, partners and administrators, (how-to guides, release notes, administration and implementation guides, and support articles).
    - Lead and participate in user testing groups.
    - Stay current with housing sector updates and trends to better support users of those HomeKeeper features in the short and long term.
4. **Facilitate an active community of connected users (10%)**
    - Monitor customer engagement and data health through relationship management processes, identifying innovative use cases to share and declined engagement to proactively re-engage.
    - Cultivate and maintain an active user base with peer learning and discussion opportunities using Trailblazer communities and other mediums.

- In partnership with the User Experience & Learning team, support and host learning opportunities such as office hours, web-based training, cohort gatherings, and annual in-person training.
- Encourage selected users to contribute more data to the HomeKeeper National Data Hub to support sector-wide collective learning, maintaining and distributing Social Impact Report.

5. **Support and collaborate with colleagues (10%)**
    - Demonstrate initiative, flexibility, accountability, and openness to change.
    - Bring creativity and problem-solving techniques to the work.
    - Participate in internal staff committees and support interdepartmental efforts, including our organization-wide focus on race, equity, and intersectionality.
    - Help shape a positive and inclusive organizational culture amongst staff and with external stakeholders.

Qualifications for Entry into this Position

The ideal candidate has experience with the Salesforce ecosystem, some knowledge or background in housing counseling or affordable housing, and experience providing technical support and digitizing workflow for a diverse user base. This position is best suited to a person with excellent communication, organizational and project management skills who works well independently and as part of a team.

Candidates should have a genuine interest in helping people, solving problems, and learning and applying new technologies. The ability to collaborate remotely with colleagues and customers is also critical for success in this position.

Knowledge, skills, and abilities

- Experience with Salesforce as a power user, Salesforce Administrator, or part of a Salesforce Administrator or Product team.
- Minimum of 3 years of work experience in a related role, such as data management, customer success, or CRM support.
- Knowledge, work experience or familiarity with affordable housing, shared equity homeownership, or housing counseling is preferred.
- Demonstrated hands-on experience with Salesforce, including troubleshooting, configurations, or supporting end users.
- Demonstrated track record of managing data start to finish, including collection, storage, analysis, and visualization. Experience with data transformations between systems is a plus.
- Strong user support and customer service skills, including troubleshooting problems, explaining fixes and helping user build best practices using the tools available to them. Experience overseeing a support system is preferred.
- Experience in technical communication, both writing and verbal, experience in creating clear documentation for audience of a wide range of technical comfort
- Experience presenting and/or coordinating online training for a variety of audiences.

- Ability to work independently in a virtual environment while coordinating a variety of projects simultaneously.
- Familiarity with tools such as Zoom, Form Assembly, Email Marketing, Tableau, Zendesk, Screensteps, Asana, and the MS Office suite of applications. Willingness to learn unfamiliar tools is essential.
- Comfortability in exploring and using Artificial Intelligence tools to augment work, including Claude and other tools, with a focus on the secure usage of data tools.

Travel required

Approximately 1-4 trips per year of out-of-state travel as needed to attend conferences and company meetings.

Starting Salary Range

$75k to $85k annually, commensurate with experience.

Benefits

Competitive, comprehensive benefits package including health, dental, matching 401k, and paid time off. Supportive, stimulating, and collaborative environment with passionate colleagues dedicated to building community, equity, and justice. Opportunities for professional growth and development.

Location

Remote, flexible location. Candidates must have direct local access to a major airport. All staff are expected to demonstrate the ability to work remotely while maintaining high levels of efficiency and productivity and communicating effectively with their direct supervisor and colleagues.

Join our team and build your career with us! We offer:

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How to Apply

Please submit, as 1 document (PDF or word), a cover letter and resume here: Link to Application Form https://app.smartsheet.com/b/form/01a135799b8f77f18adf8871d75de971