Job Description & Person Specification

Position: Business Analyst (Salesforce and Service Transformation)

Reports To: Technology Architect and Project Manager, Open Front Door programme

Daily Rate: £450

Contract: Fixed Term, 6 Months

Our Values and Behaviours

To act in accordance with "Our Values and Behaviours" at all times when delivering your role, ensuring that "Kindness", "Respect", "Belonging", and "Empowerment" are fundamental to your behaviour.

In addition to undertaking the accountabilities as outlined below, the post holder will be expected to fully adhere to all Norwood policies and procedures which are referenced in the employment contract and Norwood's intranet.

Role Summary

Norwood has brought every enquiry into a single front door. People reach us on one telephone number, one web form and a small number of email addresses, and every enquiry is recorded in Salesforce against a published service standard.

The next phase takes Children and Family Services into Salesforce as a full case management service. Today the service runs on Unite, which is only partially implemented, is nearing the end of its life, alongside spreadsheets and trackers the team maintains by hand.

We are replacing all of it with Salesforce Nonprofit Cloud, from referral through to service delivery, with case documents held in SharePoint. We are looking for a Business Analyst to lead that work , sitting with the children and family service, understanding how referrals, assessments, support plans and transitions actually happen, turning that into something our implementation partner can build, and staying with it through testing, training and go-live.

The Process in scope

This is a service transformation rather than a system installation. The processes below are the ones you will work through with the service, and the ones the new system has to support.

Referral and triage	How referrals and enquiries reach the service, how they are triaged and prioritised, waiting lists, and the hand-off from the Open Front Door.
Assessment	Standardised assessment templates and recording, so evaluations are consistent and a family's needs are not missed.

Support plans	Support plans co-produced with families, template driven, meeting quality and statutory standards.
Appointments and therapy	Booking, rescheduling and attendance, including therapy sessions and progress tracking, so appointments are not missed or double-booked.
Courses, workshops and short breaks	Scheduling, places and attendance for family support, education and therapy provision.
Pay for services	Charging, online payment and reconciliation for therapy, courses and other chargeable services.
EHCPs	Recording and tracking Education, Health and Care Plans, including review dates and actions.
Onward referral and signposting	Referral to therapy, financial assistance and external partners, with follow-up tracked rather than lost.
Transitions, ages 14 to 18	Transition plans co-designed with families from the age of 14, checking whether a young person is already known to Norwood, and the hand-over into Adult Services.
Safeguarding and child protection	Recording concerns, the visibility managers need for oversight, and the access controls that go with it.
Outcomes and satisfaction	Outcome measures, service KPIs and satisfaction surveys, so the service can show what difference it makes.
Family self-service	What families can do for themselves: book appointments, view service history and update their own details.
Case documents	Case documents held in SharePoint and connected to the Salesforce record, with agreed structure, naming and permissions.

About the role

- Run discovery with Children and Family Services, Transition and Adult Services across the processes above. Document what happens today, including the trackers and spreadsheets in use.
- Agree the target process with the service owners and turn it into a prioritised, documented set of requirements covering case management, assessments, support plans, appointments, payments, outcomes and the family portal.
- Translate those requirements into specifications and user stories for our Salesforce implementation partner, manage the backlog with them, and hold them to what was agreed.
- Define what data moves from Unite and the existing trackers into Salesforce, the cleansing needed before it does, and who owns each decision.
- Agree with the document management workstream how case documents are held in SharePoint and connected to Salesforce, including folder structure, naming and permissions.
- Define the reporting the service needs: performance against the service standard, outcomes and KPIs, and the visibility managers need for safeguarding and oversight.
- Make sure data protection requirements are met, the access model, what is visible to whom across Children and Family Services and Adult Services, and input to the data protection impact assessment.
- Write and run user acceptance testing, coordinate business testers, and track defects through to closure.
- Produce training materials, run sessions, and support colleagues through go-live and the weeks that follow. Adoption is part of the job, not an afterthought.

- Keep a clear decision log, raise risks and issues early, manage change control, and report progress weekly to the project manager and to the Technology Project Board.

Person Specification

	Essential	**Desirable**	**Evidence**
Qualification(s)	• Qualified to Degree level or extensive experience in a similar role.	-	Cover Letter / CV / Onboarding
Experience	• Demonstrable experience as a Business Analyst on a CRM or case management implementation, taken from discovery through to go-live. • Hands-on Salesforce experience, particularly cases, queues, assignment rules, reports and dashboards. Enough depth to challenge an implementation partner constructively. • Strong process mapping and requirements documentation, and the judgement to know what level of detail is useful. • Experience writing and running user acceptance testing.	• Experience in children's services, social care, SEND, health or the charity sector. • Familiarity with assessments, support planning, EHCPs or safeguarding practice and the information needs that come with them. • Experience of self-service portals, online payments for service users, or integrating SharePoint or another document store with a CRM. • Experience of change and adoption work, including training delivery.	CV / Interview / Onboarding
Knowledge & Training	• A sound understanding of data protection and of handling sensitive personal information. • A track record of working with frontline staff who are	-	Cover Letter / CV / Interview

	not technical, and of getting decisions out of busy people without escalating every time.		
Personal Qualities & Attributes	Excellent written English, and the ability to write a document that a service manager and a developer can both use.	-	Cover Letter / CV / Interview

All roles require a DBS check and satisfactory clearance under Norwood's safer recruitment policies. We are committed to safeguarding the wellbeing of our people and maintaining a respectful, safe environment.

This job description is not exhaustive and may be updated as accountabilities evolve.