

Position Description

Consultant

Position Title:	Consultant
Department:	Solutions & Delivery
Reports To:	CEO
Team Leadership:	Not Applicable
Location:	Flexible / Hybrid
Employment Type:	Full Time Permanent
Classification:	Consulting

About Clara Partners

Clara Partners is a specialist Salesforce consultancy that partners with nonprofit organisations to deliver technology solutions that amplify their impact. We work across the full Salesforce ecosystem, helping clients in the community services, health, disability, advocacy, humanitarian and research sectors to implement, configure and optimise their Salesforce platforms.

Purpose of the Role

The Consultant is an entry-level delivery role at Clara Partners, focused on hands-on Salesforce configuration and client support across an assigned portfolio of work. The role provides practical delivery capacity on client engagements, working alongside and under the guidance of Functional Consultants and the Head of CRM Solutions & Delivery.

The focus is practical and task-oriented: building Salesforce configuration accurately, managing day-to-day client interactions with care, and developing a solid foundation in Salesforce administration and consultancy practice. The Consultant grows into greater independence through demonstrated competence, checking in with their reviewer until confidence and capability are established.

The role operates under close guidance on assigned engagements, escalating solution design questions and technical decisions to the Senior Consultant, Functional Consultant and Head of CRM Solutions & Delivery.

Key Responsibilities

Salesforce configuration & delivery

- Perform Salesforce configuration tasks across assigned client engagements, including changes to objects, fields, page layouts, automations, flows, record types, validation rules and security models.
- Conduct testing and sandbox deployment under guidance, developing good habits around quality and accuracy of build.
- Translate user and stakeholder requirements into practical Salesforce functionality, checking in with your reviewer on design decisions until competence is established.
- Identify and flag opportunities for platform improvements and CRM efficiencies, raising them through the appropriate team channels.

Client engagement

- Support client interactions on assigned engagements, building professional relationships and responding to day-to-day requests with care and accuracy.
- Develop a working understanding of each client's mission, operations and data needs, so that configuration work is grounded in how the organisation actually works.
- Support the delivery of user training and contribute to client-facing documentation and adoption resources.

Reports, data & user administration

- Create and manage Salesforce reports and dashboards across standard and custom objects to meet client reporting needs.
- Handle user and licence management tasks, including setting up new users, deactivating accounts, and managing roles, profiles, permissions and public groups.
- Support data quality through checks, cleaning and standardisation; assist with duplicate management, data extractions and minor mass updates under supervision.

Ticket management & documentation

- Own assigned Jira tickets end-to-end: writing up work clearly, tracking progress in comments, keeping due dates current and moving tickets through to Done.
- Document changes, decisions and configuration in detail, following Clara Partners' standards for field descriptions, help text, Solutions Tailor entries and the closing checklist.
- Log time accurately in Harvest against the correct client and ticket, and flag blockers or risks early to your reviewer.

Practice & platform knowledge

- Stay current with Salesforce platform updates and product releases, assessing their relevance to assigned work.
- Actively develop Salesforce knowledge and work toward relevant certifications, seeking out best practice and new approaches that improve delivery.
- Build a working knowledge of integration tooling and third-party platforms commonly used in the nonprofit sector.

Selection Criteria

Essential

- At least 1–2 years' hands-on experience with Salesforce administration or a related configuration role, whether in-house or through consulting
- Working knowledge of core Salesforce Administration concepts, including objects, fields, page layouts, automation, record types and security models.
- Familiarity with NPSP or Agentforce Nonprofit, or a demonstrated interest in developing this knowledge.
- Good time management and the ability to manage multiple tasks across different clients without losing track of priorities or commitments.
- Clear written and verbal communication skills, with a willingness to ask questions and frame challenges clearly when seeking guidance.
- Genuine attention to detail in configuration, testing, documentation and data quality.
- A proactive mindset: curiosity about how things work, enthusiasm for improving processes, and openness to feedback.

Desirable

- Salesforce Administrator certification or active progress toward it.
- Previous experience within a consulting agency or nonprofit organisation.
- Exposure to integration tooling and third-party platforms commonly used in the nonprofit sector.
- Familiarity with delivery and resourcing tools such as Jira, Harvest and Forecast.
- Understanding of the Australian nonprofit sector, including its regulatory, funding and technology adoption contexts.

Key Competencies

- Salesforce craft - Builds solid, well-tested Salesforce configuration that follows Clara Partners' standards; grows technical capability with each engagement.
- Ownership - Takes responsibility for assigned tickets end-to-end; drives work to completion and asks for help early rather than late.
- Client care - Responds to clients with professionalism and care; communicates clearly and checks in when things aren't clear.
- Attention to detail - Meticulous in configuration, testing, documentation and data quality; doesn't cut corners or leave loose ends.
- Collaboration - Responsive and reliable; documents work clearly to support handover and shares knowledge with the team.
- Continuous learning - Actively grows Salesforce knowledge through certification, best practice research and engagement with the wider ecosystem.

Working Conditions

- Flexible / hybrid working arrangement with periodic client site visits and team collaboration days as required.
- Standard business hours with flexibility around client needs and delivery milestones.
- Collaborative role within a small, high-trust team using tools such as Slack, Atlassian and Microsoft Suite.
- Opportunity to deliver meaningful work for nonprofit organisations that make a real difference.