

Job Description

Job Title	Salesforce Release Specialist	Grade	G2
Department	IT	Reports	0
Reports to	Salesforce Product Owner		

Our values

The role holder will be expected to operate in line with our company values of:

- Progressive
- Warm
- Excellent
- Thoughtful

Values are the principles that drive our behaviours. They are organisation-wide and should be adopted by everyone. Behaviours provide a consistent standard we can all expect inside the organisation from one another, and towards our members and stakeholders.

Main purpose of the role

The Salesforce Release Specialist is responsible for the technical delivery and operational integrity of changes to the Salesforce CRM platform. This role focuses on implementing and maintaining a robust release framework using Copado, including pipeline automation, version control, and deployment orchestration. The specialist will lead the end-to-end release lifecycle—coordinating deployments, managing environment strategy, and helping to facilitate testing across Salesforce and Fonteva platforms. Additionally, the role provides technical support for Salesforce administration tasks to ensure platform stability, security, and scalability. Through expert configuration and adhering to best practices, this role enables the delivery of high-quality, secure CRM enhancements aligned with organisational objectives.

Dimensions & Limits

- **Scope of Work:** The Salesforce Release Specialist will primarily focus on managing and optimising the release lifecycle and related processes within the Salesforce environment, using Copado as the core toolset. This includes coordinating deployments, maintaining version control, and ensuring that changes are delivered efficiently, securely, and in alignment with organisational priorities. While the role also supports Salesforce administration and testing facilitation, its central responsibility is to ensure smooth, reliable, and well-governed delivery of CRM enhancements.
- **Decision-Making Authority:** The role involves making decisions over the planning, coordination, and execution of Salesforce releases using Copado. They determine deployment strategies, manage version control, and identify testing needs to ensure smooth and secure delivery of changes. While they do not have people management or budget responsibilities, they provide expert input on platform updates, process improvements, and release governance, working closely with the Salesforce Product Owner and technical teams to support strategic CRM delivery. Major changes or upgrades will require approval from senior IT management.
- **Collaboration:** The role collaborates closely with the Salesforce Product Owner, 3rd party developers, administrators, and business stakeholders to ensure coordinated and efficient delivery of CRM changes. They act as a bridge between technical and non-technical teams,

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facilitating communication around release schedules, testing requirements, and platform updates. By aligning deployment activities with project timelines and stakeholder needs, the role plays a key part in maintaining a stable and responsive Salesforce environment.

- **Workload:** The workload for this role is primarily focused on managing the release lifecycle and related processes, which together account for approximately 50% of the role's effort. This includes coordinating deployments, managing Copado pipelines, and ensuring version control integrity. Around 15–20% of the workload involves supporting Salesforce administration tasks such as user management and configuration. The remaining time is dedicated to facilitating testing for platform updates, monitoring Salesforce and Fonteva releases, and collaborating with stakeholders to ensure readiness and alignment. The role requires balancing planned release activities with responsive support and continuous process improvement.
- **Support Hours:** The Salesforce Release Specialist is expected to work standard business hours, typically Monday to Friday, with flexibility to support occasional out-of-hours deployments or critical releases. While the role is not primarily on-call, there may be times when support is required during evenings or weekends to align with scheduled release windows or to resolve urgent deployment issues. Flexibility and proactive communication around availability are key to ensuring smooth release operations.

Key relationships

Internal

- Salesforce Product Owner
- IT Team
- Digital Team
- Leadership Team
- All staff and departments.

External

- 3rd Party suppliers and developers

Career development

We are a learning organisation and want our employees to learn and grow during their time with us. There are many ways in which they can do this:

- Personal development days offer an opportunity to attend interactive bite sized training events.
- Our fantastic knowledge share calendar of events enables colleagues to share their knowledge with each other as well as access to a coach or mentor to help employees to navigate their chosen career paths.
- Shadowing in other departments is a popular way to learn about the roles and challenges across the different functions.

Key responsibilities / accountabilities

Release Management (15-20%)

- Own and manage the full release lifecycle across Salesforce environments.
- Execute Salesforce releases, including metadata and data migrations, code deployments, and configuration changes.
- Coordinate deployment schedules, sandbox refreshes, and release calendars.
- Ensure compliance with change management policies and audit requirements.

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- Communicate release plans and impacts to stakeholders.

Copado Administration (25-30%)

- Manage and optimize the Copado pipeline, including version control, branching strategies, and deployment automation.
- Troubleshoot and resolve deployment issues.
- Collaborate with developers and admins to ensure smooth and secure releases.
- Continuously improve DevOps practices and documentation.

Salesforce Administration (30%)

- Support user management, permissions, and basic configuration (objects, fields, flows, etc.).
- Working with the helpdesk to provide day-to-day support and training to users.
- Assist with data integrity and system maintenance tasks.

Platform Updates & Testing Facilitation (20%)

- Monitor Salesforce and Fonteva release schedules.
- Identify areas of the system impacted by updates and coordinate with relevant teams to ensure appropriate testing is planned.
- Facilitate testing activities by preparing environments and tracking readiness for deployment.

Key performance measures

- Deployment Success Rate – % of successful releases without rollback or major issues.
- Release Timeliness – % of releases delivered on or before schedule.
- Testing Coordination – Effectiveness in identifying and facilitating required testing.
- Change Management Compliance – Adherence to internal release and audit processes.
- Documentation Quality – Accuracy and completeness of release notes and deployment plans.
- Stakeholder Satisfaction – Feedback from teams on communication and collaboration.
- Issue Resolution Time – Average time taken to resolve deployment-related issues.
- Process Improvements – Number of enhancements made to DevOps or release workflows.

Person specification – (Salesforce Release Specialist)

Attribute	Essential	Desirable
Qualifications	<ul style="list-style-type: none"> • English to GCSE level • Salesforce Certified Administrator • Copado DevOps Fundamentals or Advanced certifications 	<ul style="list-style-type: none"> • Agile or Scrum Certification (e.g., Certified ScrumMaster)
Experience	<ul style="list-style-type: none"> • Salesforce Administration - hands-on experience 	<ul style="list-style-type: none"> • Fonteva Platform

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	<p>managing users, permissions, custom objects, flows, and system configuration.</p> <ul style="list-style-type: none"> • Copado Administration - practical experience using Copado for managing deployments, pipelines, version control, and environment strategy. • Release Management - experience coordinating and executing Salesforce releases across multiple environments, including rollback planning and change control. • Version Control (Git) - experience using Git for managing metadata, resolving merge conflicts, and maintaining deployment history. • Testing Facilitation - experience identifying testing needs and coordinating with QA or business teams to ensure readiness for releases. • Cross-Functional Collaboration - proven ability to work with developers, admins, product owners, and business stakeholders to align on release priorities and timelines. 	<ul style="list-style-type: none"> • Exposure to Fonteva's managed package and update cycles. • Experience working in Agile environments and participating in sprint planning and retrospectives.
<p>Knowledge</p>	<ul style="list-style-type: none"> • Understanding of Salesforce architecture, metadata types, configuration options, and environment management. • Copado Toolset - knowledge of Copado features including pipelines, user stories, promotions, back promotions, and compliance gates. • Release Management Processes - familiarity with structured release cycles, change control, sandbox strategies, and rollback planning. • Version Control Systems - working knowledge of Git, branching strategies, and conflict resolution in a Salesforce context. • Testing & Quality Assurance - awareness of testing types (unit, regression, UAT), and 	<ul style="list-style-type: none"> • Understanding of Apex, Lightning Components, or Visualforce (not required, but helpful for troubleshooting) • ITIL Foundation or Change Management Training • Understanding of Fonteva's managed package structure, update cycles, and integration with Salesforce. • A high-level understanding of OwnBackup configuration.

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	how to coordinate testing in a Salesforce environment.	
Skills	<ul style="list-style-type: none"> • Copado Administration: Proficient in configuring pipelines, managing version control with Git, automating deployments, and overseeing environment management using Copado. • Salesforce Release Management: Proven ability to manage release cycles, coordinate sandbox refreshes, and ensure compliance with change management processes. • Salesforce Administration: Proficiency in user management, profiles, permission sets, custom objects, flows, validation rules, and basic configuration tasks. • Version Control Systems: Familiarity with Git-based workflows and branching strategies. • Communication: Able to clearly explain technical concepts to non-technical audiences • Documentation: Skilled in creating clear and comprehensive release documentation and deployment plans. • Analytical & Organisational Skills: Strong analytical thinking paired with structured organisation to manage complex tasks and processes. • Problem-Solving: Adept at identifying and resolving deployment and configuration issues efficiently. • Attention to Detail: Focused on accuracy in system configuration and change tracking. • Time management and ability to prioritise tasks effectively 	
Behaviour / Competency	<ul style="list-style-type: none"> • Proactively identifies issues and implements practical, scalable solutions. • Demonstrates a willingness to learn new tools, stay current 	

	<p>with Salesforce and Copado updates, and explore process improvements.</p> <ul style="list-style-type: none"> • Works effectively with cross-functional teams including developers, admins, testers, and business stakeholders. • Takes ownership of release processes and follows through on commitments. • Responds well to change, shifting priorities, and evolving project timelines. • Understands the needs of internal users and stakeholders, ensuring that CRM changes support business goals. 	
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