

**Conquest Planning** is a leading financial planning software company with a purpose-driven approach to delivering financial advice. Established in 2018, Conquest Planning was founded by a team of financial technology veterans whose track record of success spans over 30 years in the financial planning software space. The company's mission is to ensure that everyone has access to great financial advice, transforming the financial planning landscape and improving outcomes for all clients. Users of Conquest Planning leverage its intuitively designed product, simple onboarding process, and data-driven artificial intelligence to accelerate the delivery of beautifully designed, hyper-personalized financial plans. We are based out of Winnipeg, Manitoba and have team members located across Canada, the United States, and United Kingdom.

We are seeking a **Salesforce Solutions Manager** to join our dynamic team!

The **Salesforce Solutions Manager** combines strategic product ownership, project management, and hands-on Salesforce administration. This role leads initiatives that ensure Salesforce continues to evolve in ways that improve efficiency, streamline workflows, and support scalable growth as Conquest expands. The successful candidate will translate stakeholder needs into actionable Salesforce solutions, manage related projects through their full lifecycle, and oversee the platform's day-to-day operations.

This is a remote / work from home opportunity.

#### **Duties of the role include:**

##### **Product Ownership**

- Gather, prioritize, and document business requirements from cross-functional teams, translating them into clear user stories and solution designs.
- Manage the Salesforce backlog and collaborate with stakeholders to prioritize enhancements aligned with business and strategic goals.
- Lead the strategic evolution of Salesforce usage across departments, ensuring consistency and alignment with Conquest's growth objectives.
- Assess the impact of new features or requirements on existing workflows, data structures, and integrated applications.
- Champion user experience by fostering feedback loops and driving continuous improvement.
- Translate technical details into clear, business-friendly language for non-technical audiences.

##### **Salesforce Administration**

- Act as the primary administrator for Conquest's Salesforce ecosystem.
- Configure and maintain system elements such as objects, page layouts, workflows, validation rules, automation, and approval processes.
- Design and manage case management workflows, including queues, escalation rules, SLAs, and Client Portal functionality.
- Maintain data quality standards through validation, governance, and automation.
- Oversee integrations between Salesforce and other business systems, ensuring seamless data flow and system reliability.
- Provide support for escalated Salesforce issues.
- Manage user access, roles, profiles, permission sets, and overall security model.
- Stay current with Salesforce releases and proactively implement new capabilities.
- Create training materials, documentation, and onboarding support to improve adoption across teams.

## **Project Management**

- Lead end-to-end Salesforce-related projects, including planning, resource coordination, execution, and delivery.
- Define project scope, milestones, and deliverables; track progress and communicate updates to stakeholders.
- Collaborate with internal teams (Sales, Support, Operations, Product, and IT) to ensure alignment and timely delivery.
- Manage vendor relationships and oversee third-party contributions where applicable.
- Evaluate risks, dependencies, and change management requirements to ensure project success.

## **Qualifications required:**

- Bachelor's degree in a related field or equivalent experience.
- Salesforce Administrator certification required; Platform Administrator II or Platform App Builder certifications preferred.
- 2+ years of Salesforce administration experience, including responsibility for complex system configuration and user management.
- Strong understanding of Salesforce architecture and core clouds (Sales Cloud, Service Cloud, Agent/Agentforce, and Salesforce AI).
- Proven experience managing medium- to large-scale projects, using Agile methodologies.
- Excellent organizational, communication, and stakeholder management skills.
- Strong analytical and problem-solving abilities; detail-oriented with the ability to balance multiple priorities.

## **What to expect:**

- An inclusive culture comprised of extremely talented individuals.
- A leadership team with a proven track record of success.
- The opportunity to join a company as it expands across the globe.
- Competitive compensation and generous benefits.

## **How to Apply:**

We're excited to learn about you and want to give you the opportunity to set yourself apart from everyone else. Along with your Resume, send us a personalized Cover Letter, Email or Video telling us why you are interested in this job, the fintech industry, and the reason you would like to work with us.

## **Next steps:**

If this exciting opportunity is of interest to you, please forward your application as described above with **Salesforce Solutions Manager** in the subject line to Human Resources at [human.resources@conquestplanning.com](mailto:human.resources@conquestplanning.com) by **February 6, 2026**.

We thank all applicants for their interest. Only those invited for an interview will be contacted.

Conquest Planning Inc. is an equal opportunity employer. Our inclusive work environment welcomes diversity and supports accessibility. If you require accommodation at any time during the recruitment process, please contact [human.resources@conquestplanning.com](mailto:human.resources@conquestplanning.com).