



**CREATIVE
PLANNING**
TECHNOLOGY SOLUTIONS

Title: Managed IT Support Services I

Location: Various

Job Description: **JOB SUMMARY**

Creative Planning is a top tier wealth management firm that provides investment management services and full comprehensive financial planning in-house. Additionally, it provides managed IT solutions, encompassing network, application, infrastructure, and security management services. Our Managed Service Provider (MSP) team delivers proactive services and addresses unforeseen issues to ensure smooth and efficient client operations.

The primary responsibility of the **Managed IT Support Services I** is to provide clients with remote troubleshooting and guidance with clear communication. With at least one to two years of experience or technical education, they should be eager to learn while following prescribed procedures.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

Job Duties:

- Provide Tier 1 remote or onsite support as required.
- Aim to resolve client issues during initial call, minimizing escalations.
- Refer tickets to Dispatch team for scheduling alternative resources when necessary.
- Thoroughly document troubleshooting steps and resolutions.
- Maintain transparent communication with clients, providing updates on progress, next steps, and expected timeframes.
- Manage client expectations to prevent surprises like unexpected costs or delays.
- Engage in continual informal and formal training on relevant technologies and solutions.
- Document daily time allocation, both within tickets and other tasks.
- Potential involvement in premium client teams or primary technician roles for SMB clients

Required Experience/Qualifications:

- 1-2 years of technical IT experience or technical education
- Experience required with Windows desktop and server operating systems
- Understanding of TCP/IP and troubleshooting Internet connectivity

- Experience with Terminal Services
- Understanding of the relationship between switches, hubs, patch panels and connecting nodes to a network
- Working Knowledge of Wireless Technologies
- Credentials and Experience:
- New hire with no certifications
- Eager to learn
- Takes direction from System Administrators/System Analysts/Team Lead
- 2 year MIS/IT Tech program is a plus