



Title: Managed IT Implementation Specialist

Location: Bloomington, MN

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 Implementation Specialist is to configure and implement comprehensive technology solutions to meet the needs of clients and prospects. This role covers the full spectrum of technology support, from initial configuration and installation to repair, maintenance, and crisis response. The Specialist will ensure that all client technology requirements are met efficiently, handling both urgent issues and routine maintenance tasks to uphold a high standard of service and reliability.

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

JOB DUTIES:

- Provide regular project management communication throughout project implementation.
- Set clear expectations in pre-project meetings and kickoff calls.
- Respond promptly and resolve any issues arising from implementation.
- Participate in regular on-call rotations to support client production environments.
- Create and update network documentation and diagrams.
- Complete tickets in the ticketing system to track time spent on client and non-client issues and repairs.
- Implement new technology as part of project engagements.
- Assist in developing processes to support Managed IT services and Project Team procedures.
- Serve as an escalation resource for the support team with proactive and reactive tickets.

- Conduct regular contact via phone or email and meet with clients or perform work at client sites as needed.
- Demonstrate a commitment to staying up-to-date with technology, including maintaining professional certifications as agreed upon with the manager.
- Maintain strong working relationships with third-party service providers and vendors.
- Multi-task, problem-solve, and complete all assigned duties with limited supervision.
- Collaborate with the Sales team to determine client needs.
- Conduct oneself professionally with clients and internal staff.
- Produce high-quality work, monitor one's own work, and consistently maintain confidentiality.
- Manage schedule and communications with clients effectively.
- Set and meet defined project deadlines with clients.
- Actively participate in pursuing new business opportunities for this service.
- Perform other duties as assigned.

JOB REQUIREMENTS /QUALIFICATIONS:

- Minimum of 2 years of IT support experience; a degree or diploma in Computer Science, Management of Information Systems, or a related field is a plus.
- Must possess associate-level certifications in two technology disciplines (Cloud, Infrastructure, Security) or be willing to complete training within the first year of employment.
- Must be able to sit and stand, with occasional lifting of up to 50 lbs.
- Experience configuring, installing, and administering network hardware such as firewalls, routers/switches, SD-WAN, and wireless equipment.
- Experience configuring, installing, and administering Cloud solutions such as Microsoft 365 or Microsoft Azure.
- Experience configuring, installing, and administering on-premises server infrastructure, Active Directory, and hypervisors such as VMware or Hyper-V.
- Experience working in a team-oriented, collaborative environment.
- Must be customer-service oriented and detail-oriented.
- Must be able to work efficiently, multitasking in a fast-paced environment with a high sense of urgency.

TECHNICAL SKILLS:

- Strong analytical and problem-solving abilities.
- Excellent written and verbal communication skills.
- Experience configuring, installing, and administering hosted phone systems, such as RingCentral or Teams, is a plus.