

Title: Business Process Specialist, RFP

Location: Remote

Job **JOB SUMMARY**

Description:

Creative Planning is a leading retirement plan advisor to employers and employees nationwide providing fiduciary consulting, investment advice, compliance support, and employee financial education.

The **RFP Team Business Process Specialist** will work alongside other specialists to support the functions of the centralized Vendor RFP Team. Those areas include, but may not be limited to, service provider benchmarking projects, vendor management, reporting, meeting coordination and other projects as determined by business needs.

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

Job Duties:

- Meets or exceeds the Service Level Expectations (SLEs) set by the Business Process Leader and/or Director
- Partners with Managing Directors and Business Development Specialists to manage and effectively execute Service Provider RFP projects
- Responsible for partnering with Managing Directors and Consultants to create RFP documents for distribution to bidders, reviewing recordkeeper RFP submissions, creating analyses of proposals to be presented to clients, scheduling and leading planning calls, maintaining the execution calendar, and following up with all parties on due dates
- Works with the RFP Business Process Leader to enhance and maintain the RFP answer database
- Keeps an open line of communication with all project stakeholders
- Evaluates feedback from stakeholders and implements a plan for areas of improvement and optimization
- Works in conjunction with the leaders across the organization to cultivate answers to common RFP questions
- Assists in the training and development of other specialists
- Takes an extremely detail-oriented approach to projects and tasks
- Other duties may be assigned

Required Experience/Qualifications:

- B.A. or B.S. from an accredited university
- 3+ years' experience in retirement plan services industry
- Willing to build expertise in areas with little to no knowledge required
- Strong organizational and time management skills to prioritize heavy individual workload to meet time-sensitive deadlines

- Demonstrated ability to effectively communicate and interact with stakeholders at all levels of the organization via phone, email, and in person
- Strong attention to detail with a high degree of accuracy in executing tasks and managing projects
- Proven ability to comprehend, analyze, and interpret complex documents and information
- Strong problem-solving skills with the ability to work independently and exercise sound judgment with minimal supervision
- Ability to manage multiple projects simultaneously, prioritize effectively, and meet deadlines