

Title: Technical Business Analyst – Data & Automation

Location: USA (Remote)

Description: About Us

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

Creative Planning is revolutionizing the wealth management industry by providing comprehensive financial planning and investment management services under one roof. Our innovative approach extends to our cutting-edge IT solutions, where our Managed Service Provider (MSP) team plays a crucial role in keeping our clients at the forefront of technological advancement.

As a division of Creative Planning, we have the unique advantage of focusing solely on delivering exceptional service without the typical MSP pressures. This allows us to build something truly special:

Our People & Leadership

- **Authentic Leadership:** Our management team leads rather than manages, taking feedback to heart and supporting your growth while avoiding micromanagement
- **True Team Environment:** We don't just talk about teamwork – we live it. Our technicians actively support each other, share knowledge, and collaborate across teams
- **Thoughtful Communication:** We protect focused work time while maintaining strong collaboration. We favor clear, written communication over impromptu calls, enabling deep work and thorough documentation

Our Approach to Growth

- **Technical Breadth:** We're one of the few MSPs with deep expertise in both Windows and Mac environments, offering diverse technical challenges
- **Continuous Learning:** We encourage self-study and professional development, providing opportunities to work with cutting-edge technologies
- **Career Advancement:** From participating in premium client teams to leading SMB accounts, we offer multiple paths for growth

Our Client Philosophy

- **Relationships First:** Technical solutions are just a byproduct of understanding client needs and being their trusted advisor
- **Balance of Independence:** While we collaborate as a team, we trust our professionals to take ownership and work independently

- **Deep Work Philosophy:** We maintain strong client relationships while protecting focused work time through thoughtful communication practices

Our Rewards & Benefits

- **Results-Focused Culture:** We skip the pizza parties in favor of meaningful recognition through raises and bonuses
- **True Remote Freedom:** Enjoy the flexibility of genuine remote work with the option to use office space when needed
- **Shared Success:** When we double our revenue, the whole team celebrates with a company-sponsored trip – including flight allowance, hotel accommodations for you and a guest

The Opportunity

Our Data and Automation team builds the systems that change how our clients run their businesses: the warehouse that finally gives them one version of the numbers, the automation that takes three days of manual work down to twenty minutes, or the AI skill that updates their CRM. None of that gets built well unless somebody first understands the business problem properly and writes it down in a way an engineer can build against. That is this role.

The **Technical Business Analyst** will work alongside a Tech Advisor across roughly twelve client engagements. The advisor owns the technical direction: the architecture, the roadmap, what we should build and in what order. You own everything that turns that direction into motion. You run the requirements conversations, document how the work actually happens today, write the user stories our engineers pick up, track the actions to closure, and keep every client knowing exactly where things stand. You are in those client meetings, not behind them.

You will report to a Technology Advisor and work day to day with the tech advisors, our engineers, and directly with client stakeholders ranging from an operations manager to a CFO to a business owner.

You will do well here if you are the person who cannot leave a vague requirement alone. If you have ever sat in a meeting where everyone nodded and you were the only one who noticed nobody actually agreed on what "customer" meant, this is your job.

What You'll Do

Requirements and Analysis

- Run discovery sessions with client stakeholders to understand how work happens today, not how the org chart says it happens
- Document current-state processes, data sources, and the workarounds people have quietly built
- Write user stories and acceptance criteria our engineers can build from without a follow-up call
- Ask the second and third question when the first answer is vague

Client Engagement

- Join weekly and monthly client sessions as a named member of the team
- Own the agenda, the notes, and every action item that comes out of a meeting
- Send status updates the client does not have to chase you for
- Chase credentials, access, approvals, and the answers nobody else wants to chase

Engagement Delivery

- Keep roughly twelve engagements moving without dropping one
- Translate between what the client said and what the engineer needs

- Flag scope creep, stalled decisions, and slipping timelines before they become a problem
- Keep our project tracking honest so the team knows what is actually happening

Documentation and Knowledge

- Build the documentation that outlives any one person on the account
- Maintain client context so an advisor walking into a meeting is never starting cold
- Turn recurring questions into reusable templates and process assets

Technical Skills & Experience

- Experience as a business analyst, technical project coordinator, or similar role where you owned requirements
- Ability to engage comfortably in technical conversations about data, systems, integration and AI without leading architecture decisions.
- Proven ability to write clear requirements: user stories, acceptance criteria, process documentation
- Strong working knowledge of spreadsheets and reporting tools, and enough SQL literacy to know what you are looking at
- Experience with project or work management tools such as ClickUp, Jira, Asana, or Monday
- Exceptional organization across many simultaneous threads, with nothing falling through the cracks
- Clear, direct written communication that busy people actually read
- Comfort working with senior client stakeholders, including asking a CFO an inconvenient question
- Consulting, agency, or professional services background preferred
- Familiarity with data warehousing, BI, or business automation concepts is a strong plus

What Sets You Apart

- **Requirements Detective:** You do not accept the first answer. You keep asking until you understand the actual problem, and you have found the real issue hiding behind the stated one more than once.
- **Trusted Translator:** You can sit with a CFO and an engineer in the same conversation and make both feel understood.
- **Nothing Drops:** People trust you with the thing they cannot afford to forget, because in your hands it never gets forgotten.
- **Process Builder:** You do not just work the system, you improve it. When you find yourself doing something the third time, you make it repeatable.
- **Comfortable Not Knowing:** You are technical enough to follow the conversation and secure enough to say "let me get the advisor on this" instead of guessing.

Salary Range: \$75,000 - \$85,000