



Title: Systems Analyst

Location: Waterloo, Iowa

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. Recently, we have added Managed IT solutions to the suite of services we are able to provide to clients.

The primary responsibility of the **Systems Analyst** is to address and resolve technical challenges, ensuring clients experience seamless and reliable functionality in their computer systems.

The **System Analyst** may be part of a premium-client team or in a primary technician role and should possess excellent communication skills, the ability to manage client support needs effectively, and a commitment to prompt and clear client communication. The ideal candidate is an individual who is eager to learn, adaptable, and can follow prescribed procedures diligently.

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

Job Duties:

- Work on and resolve helpdesk tickets for a wide array of client issues
- Utilize ticketing system to manage and record progress of helpdesk tickets and projects
- Communicate to the client the status of their ticket every step of the way, notify them of any changes or outages related to their issue
- Manage client expectations, minimizing “surprise” situations including unexpected costs and delayed issue resolution
- Navigate client documentation to help solve issues quickly, accurately, and consistently
- Generate detailed documentation with steps used for issues that are either new or not yet documented
- Delight clients by making interactions friendly, quick, and helpful
- Participate in continual technologies and solutions training (formal and informal) related to team’s services
- Provide remote or on-site troubleshooting

- Identify, communicate, and mitigate potential risks to the client
- Follow and create SOPs for daily / weekly recurring tasks
- Follow security procedures and keep a vigilant eye for security issues during the regular course of your work with clients
- Identify opportunities for improvement and offer constructive suggestions to both clients and team members

Required Experience/Qualifications:

- A love of (and ability to) solve problems & challenges in a client-facing role
- A basic understanding of operating systems, business applications, printing systems and network systems
- Experience with Microsoft Windows desktop and Server operating systems
- An understanding of the relationship between switches, hubs, patch panels and connecting nodes to network
- Experience with Cloud related technologies such as Microsoft 365 and Azure
- Ability to perform diagnosis skills of technical issues related of end-user hardware & software and network devices
- A basic understanding of Wireless Technologies
- Experience and knowledge of working with the Microsoft 365 Platform
- The ability to speak both Geek **and** human
- Ability to travel locally

Preferred Experience/Qualifications:

- Experience using a service ticketing system
- Experience working with Apple Mac and iOS devices
- Experience working either on a helpdesk with MSP or IT support business
- 2-year MIS/IT Tech program is a plus