



Business Analyst

Position Summary: The Business Analyst works closely with all departments to research, define, document, test and implement or improve business processes. The Analyst is knowledgeable in data flow from one application to another and is well-versed in modelling tools, lean/efficiency processes, automation technologies, and systems related to content management and business information. S/he analyzes and documents the useful and non-useful attributes of various processes and collaborates with stakeholders to redesign the new processes in order to favorably impact efficiency, effectiveness, and cost/resource allocation. S/he acts as data/process flow expert.

Primary Roles and Responsibilities:

- Understands and documents data and process flow. Identifies opportunities for improvement through meeting with teams across departments.
- Designs improved processes taking into consideration business rules and regulations and formulates a supportive directive on how to deploy changes as well as manage subsequent changes.
- Use reports and visual diagrams via business process modeling practices to support processes as is and recommendations for changes and improved state. Also makes strong business case to ensure satisfactory results can be measured.
- Acts as a liaison between all departments team to ensure optimal understanding of process, change recommendations, and business requirements required for system solutions.
- Tracks and fully document changes related to business specifications; writes detailed, universally understood requirements for use by both business and technical staff.
- Collects data and feedback on process performance during and following process improvements to continually improve on engagements going forward.
- Assists in supporting overall change management strategies related to process improvement.
- Provides assistance in testing, training, and mentoring of business related to process improvement and possibly automation/system solutions.

Required Qualifications:

- Bachelor's degree -preferably in Finance
- 5 + years of experience
- Experience in data flow and analysis
- Experience in process and project management
- Strong analytical skills
- Organizational skills and time management
- Excellent written and verbal communication skills
- Detail oriented
- Strong team building skills

Desired Qualifications:

- Experience in the Financial and/or client services industry with Registered Investment Advisors (RIAs) is strongly preferred.
- Exposure/experience in the following programming languages is preferred: SQL Server, C# and Visual Basic for Applications (VBA).
- Well organized, detail oriented and able to focus and prioritize multiple tasks in a dynamic environment.
- Effectively listen and collaborate with all levels of employees across the organization.
- Ability to take initiative and work independently as well as on a team. Experience working with multiple stakeholders to drive projects through to the finish line.
- Familiarity with any of the following applications would be a plus: Advent Portfolio Exchange, MOXY, or Bloomberg.

How to apply for Business Analyst role: submit resumes to WBIHR@wbiinvestments.com