



Title: Systems Analyst

Location: Waterloo, Iowa  
Bloomington, Minnesota

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