



Title: Business Intelligence Analyst

Department: Wealth

Reports to: Chief Operations Officer – Wealth

Status: Full-time, Exempt

Location: Overland Park, Kansas (onsite)

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We take immense pride in our work and are in search of like-minded individuals who are eager to make a significant impact. If you're ready to be a part of a team that's shaping the future of financial services, we'd love to hear from you.

Position Summary

The **Business Intelligence Analyst** is responsible for supporting the organization's business intelligence, data integration, reporting, and analytics functions. This role serves as a key operational partner to the Director of Business Intelligence by managing recurring reporting requirements, maintaining data pipelines and databases, supporting system integrations, and ensuring the reliability and accessibility of enterprise data.

The ideal candidate possesses strong technical skills in SQL, Snowflake, Python scripting, and database management, along with a customer-service mindset and the ability to work collaboratively across departments. The **Business Intelligence Analyst** will play a critical role in transforming business requirements into practical reporting and data solutions while helping drive process automation and operational efficiencies throughout the organization.

Ideal Candidate Profile

A hands-on BI professional who enjoys solving business problems through data, automation, and system integration. This individual excels at supporting daily operational needs, maintaining data environments, and ensuring stakeholders have reliable access to the information they need, allowing the Director of Business Intelligence to focus on strategic initiatives and enterprise data architecture.

Duties and Responsibilities include, but are not limited to:

Reporting & Analytics Support

- Develop, maintain, and enhance recurring operational, financial, and executive reports.
- Create dashboards and visualizations that provide actionable insights for business users.
- Respond to ad hoc reporting requests and data analysis needs.
- Ensure reporting accuracy through routine validation and quality assurance processes.
- Monitor key business metrics and proactively identify trends, anomalies, or data quality issues.

Data Integration & Management

- Support the integration of data between custodians, TAMPs, and proprietary systems.
- Assist with the development and maintenance of ETL/ELT processes.
- Monitor and troubleshoot data pipelines to ensure timely and accurate data delivery.
- Document data flows, integration logic, and business rules.
- Work closely with business stakeholders to understand data requirements and support process improvement initiatives.

Automation & Development

- Develop Python scripts and automation solutions that improve efficiency and reduce manual processes.
- Support API integrations and data exchange between internal and external systems.
- Participate in testing, deployment, and support of BI and data integration solutions.
- Troubleshoot technical issues and implement corrective actions.

Operational Support

- Serve as the primary point of contact for day-to-day BI support requests.

- Manage recurring reporting schedules and data refresh processes.
- Support user training and adoption of BI tools and reporting solutions.
- Escalate strategic, high-complexity, or enterprise-level issues to the Director of Business Intelligence.

Required Qualifications

- Bachelor's degree in Information Systems, Computer Science, Data Analytics, Business, or related field.
- Experience working with Snowflake data platform.
- Strong SQL development and query optimization skills.
- Experience with Python scripting and automation.
- Understanding of database design, maintenance, and troubleshooting.
- Experience supporting ETL/ELT processes and data integrations.
- Strong analytical and problem-solving abilities.
- Excellent communication and organizational skills.

Preferred Qualifications

- 3+ years of experience in business intelligence, reporting, data analytics, database administration, or data integration.
- Experience with Power BI, Tableau, or similar visualization platforms.
- Experience integrating financial systems.
- Familiarity with Azure, AWS, or cloud-based data platforms.
- Experience with APIs and data exchange technologies.
- Knowledge of data governance, master data management, and data quality best practices.
- Experience supporting users in a fast-paced operational environment.

Key Competencies

- Data Analysis & Reporting
- Database Management
- Systems Integration
- Process Automation
- Attention to Detail
- Customer Service Orientation
- Problem Solving
- Collaboration
- Time Management
- Continuous Improvement

Success Metrics

- Timely and accurate delivery of recurring reports and dashboards.
- Reduced manual effort through automation and process improvements.
- Reliable operation of data integrations and pipelines.
- High stakeholder satisfaction with BI support and responsiveness.
- Improved data quality and consistency across business systems.
- Effective execution of departmental priorities and projects.

Demonstrate and Represent Our Core Values

- *Provide Unreasonably Excellent Service*
- *Love What We Do*
- *Act with Integrity*
- *Collaborate Courageously*
- *Evolve with Purpose*

About CreativeOne

CreativeOne is an industry-leading marketing and consulting firm that helps independent financial advisors grow their businesses. We combine deep financial expertise with full-service creative and media capabilities, delivering tailored marketing that drives measurable growth. With over 40 years of innovation behind us, we're building the next generation of advisor marketing—and we're looking for top talent to help lead the way.

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This description covers the major purpose and major functions of the job. It is not intended to give all details or a step-by-step account of the way each task is to be performed. Employees may receive other job-related instructions and be required to perform other job-related duties requested by their supervisor. All requirements are subject to possible modification to provide reasonable accommodation to qualified individuals with disabilities.

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