

At Diamond Hill, we are committed to an intrinsic value-based investment philosophy with a long-term focus and are interested in knowledgeable, self-directed individuals with a passion for the investment management business. We seek energetic, team-oriented, versatile candidates with the desire to be part of a growing and dynamic organization. For dedicated individuals with a strong work ethic, we offer the opportunity for a career rather than just a job.

JOB DESCRIPTION

CRM Business Analyst

POSITION SUMMARY

The CRM Business Analyst plays an important role in ongoing support of the client relationship management system (CRM) and its user base. The analyst's day-to-day activities include, but are not limited to: business requirements gathering and documentation; project management; production of CRM dashboards and other reporting, in conjunction with technology team members; daily tactical support for CRM users; management of the CRM group mailbox; execution of data cleansing efforts; initial and ongoing training of CRM users, and facilitation between CRM users and technology team associates.

POSITION RESPONSIBILITIES

- Facilitate discussion with various functional groups to capture and prioritize business requirements for CRM initiatives.
- Design and produce various dashboards and reports for Client Team use, and help facilitate query and report development for users' needs.
- Provide daily support to end users, including supporting CRM group mailbox and issue resolution.
- Execute on data cleansing efforts in the CRM system and related systems.
- Serve as liaison between the CRM ownership team, users of the CRM system, and the technology team.
- Describe and clarify business processes to help the technology team understand the impacts and benefits of the application to the business.
- Analyze data, issues, and requests to recommend ideas on how to enhance the CRM and help team members be more effective in their roles and work habits.
- Work with internal and external resources to identify potential solutions to meet business needs.
- Coordinate and participate in business use testing of CRM functionality with various functional groups.
- Provide initial and ongoing training for CRM users.
- Manage and monitor usage of CRM and work with both management and end users to improve user adoption and communicate the benefits of utilizing the CRM system.

QUALIFICATIONS/SKILL SET

- 1-5 years of experience in a business analyst role within the financial services industry preferred.
- Knowledge of investment management, finance, securities markets, mutual fund industry, and/or related fields.
- Ability to facilitate collaborative discussions with peers and client team/firm leadership.
- Detail-oriented, with excellent planning and organization skills. Ability to manage multiple tasks, meet deadlines, and react to changing priorities.
- Proactive and resourceful, with the ability to work independently and problem solve.
- Strong project management skills, including the ability to take initiative and to prioritize and manage multiple projects simultaneously.
- Ability to effectively communicate business needs and technical concepts verbally and in writing.
- Proven analytical and problem-solving skills.

- Ability to independently identify and troubleshoot data-based discrepancies.
- Comfort with learning new technology. Experience with Microsoft suite of products (including Dynamics CRM and PowerBI) preferred.
- Willingness and aptitude to pursue learning opportunities to deepen technical and functional knowledge base of CRM system.
- Prior CRM experience preferred.

EDUCATION AND CERTIFICATIONS

- Bachelor's degree in business, finance, and/or computer science required.
- Advanced degree or industry designations a plus.
- Willingness to complete CFA Institute Investment Foundations certificate to acquire a basic understanding of our business and industry.

Diamond Hill associates enjoy a working environment that supports professional and personal growth, thereby enhancing associate satisfaction, the productivity of the firm, and most importantly, the experience of our clients.

A commitment to our intrinsic value-based investment philosophy is essential and *all* associates with a desire to make additional investments in U.S. equity or corporate bond securities are required to do so by investing in Diamond Hill Funds, thereby aligning our interests with those of our clients.



Interested candidates please apply online at www.diamond-hill.com/careers/