

# Nuveen Investments

## Position Description

<b>Position Title:</b>	Senior Salesforce Business Analyst
<b>Reports To:</b>	Team Lead
<b>Location of Position:</b>	Chicago, IL
<b>Department or Division:</b>	Global Distribution Solutions
<b>FLSA Status:</b>	Exempt
<b>Date:</b>	October 2017

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**SUMMARY:** The Global Distribution Solutions group works across sales, marketing, product, and service teams to build processes and functionality to solve key problems to help drive our business forward. The group focuses on incorporating data, CRM functionality, customer-based analysis and analytical insight into the distribution processes in an effort to improve our strategic and tactical approach to distribution effectiveness. We work to understand our clients across all distribution channels, and we use a creative, intelligent approach to CRM to encourage adoption. This business focused role helps drive the vision and roadmap for Nuveen's Salesforce implementation.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:** *The following duties are generally representative of the nature and level of work assigned and are not necessarily all inclusive.*

- Contribute to the vision and roadmap for Nuveen's Salesforce implementation
- Plan, direct, and execute the creation of functionality that serves complex business issues.
- Facilitate business requirement gathering and definition through various methods including joint collaboration sessions with business and IT, targeted Q&A sessions with multiple subject matter experts, and one-on-one user interviews.
- Analyze and interpret business requirements to prepare documents such as business and functional requirements, user stories, use cases/models, gap analysis, current and proposed process flows, and data flows.
- Influence, negotiate, and integrate requirements from multiple stakeholders to reach consensus on scope.
- Identify/escalate and/or manage requirement conflicts, issues and changes in order to appropriately manage scope.
- Work with internal and external resources to identify potential solutions to meet identified business needs.

**QUALIFICATIONS:** *To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

**EDUCATION AND/OR EXPERIENCE:**

- 7+ years of relevant hands-on experience in developing Salesforce.com based business applications
- Salesforce Administrator and Developer certifications
- Asset management or financial services industry experience preferred
- Bachelor's Degree. Some post graduate work, such as technical or financial certifications, or work towards master's degree, is preferred.

**KNOWLEDGE, SKILLS AND ABILITIES:**

- Proficient programming and configuring the Salesforce.com platform; deep functional understanding of its architecture, capabilities and limitations
- Experienced with Salesforce.com development tools and techniques including the APEX language, Lightning Experience, Force.com custom development, triggers, controllers, Force.com SOAP and REST APIs, JSON, sObjects, SOQL, SOSL, Chatter APIs, outbound messaging and creating Visual Force pages
- Expert migrating metadata between Salesforce environments using change sets and other tools as needed
- Proficient with Salesforce.com Mobile / Salesforce 1
- Strong understanding of object oriented concepts and relational database concepts
- Understanding of Sales, Marketing and Service business processes is a must

**ADDITIONAL:**

- Certified Salesforce Sales Cloud Consultant a plus
- Experience integrating Salesforce.com with enterprise-level applications through all available integration channels as well as Salesforce-to-Salesforce integrations
- Experience with AppExchange partners such as Pardot, Riva, CalendarAnything
- Experience with Salesforce Community Cloud, Marketing Cloud, Sales Cloud, Service Cloud
- Experience with data providers and services within the Distribution, Marketing, and Product Financial Services universe, e.g. Cvent, Preqin, BrightScope
- Strong presentation skills
- Has a proven track record of excellent project and people management
- Strong analytical skills
- Ability to display independent judgment to make decisions where no clear precedents exist; adjusts plans and deliverables with the right approvals and the business goals in mind. Ensures that all standards are followed and controls are adequately designed and implemented.

**TRAVEL:**

- Limited travel required (<10%)