

## CRM/Business Analyst

### The Opportunity:

The CRM/Business Analyst assists in the overall implementation of data, processes, profiles and architecture of the CRM solution. The CRM Analyst will work with our delivery / consulting and client teams around requirements gathering, discovery process and selection, API's and configurations and assisting with CRM selection process.

### Responsibilities:

- Gather requirements
- Conduct analyses of CRM data requirements
- Assist in defining, documenting, and maintaining process flows as well as policies and procedures
- Adhere to corporate data management processes and oversight procedures to ensure data integrity
- Assist in projects by conducting business analysis and submitting necessary documentation

### Qualifications:

- Five to ten years' experience in Asset Management
- Proficiency in SFDC Administrative tasks – e.g., creating profiles/roles, user setup, page layouts, reports/dashboards
- Experience with development, administration, configuration, and implementation of Salesforce CRM
- Demonstrated experience with data models and ETL and processing
- Desire to work in a team-oriented environment yet able to work independently
- Strong written and verbal communication skills
- Senior Consultant - Data Analyst
- Client Reporting Business Analyst
- Marketing Manager, Part Time

If you are interested in learning how you can become a member of Olmstead Associates Expert Teams, please send an email to [recruiting@olmst.com](mailto:recruiting@olmst.com)

Olmstead Associates is a leading specialized consulting firm to the investment management industry. For over 20 years, Olmstead has provided consulting expertise to help investment managers plan for, select, and implement solutions. Our Operations, Technology, and Data experts, proven methodologies, and leading-edge tools help inform our clients to make better decisions and lower project risk.

Contact Olmstead Associates

617-778-0372

[info@olmst.com](mailto:info@olmst.com)

185 Devonshire St, Boston, MA 02110