

Business Systems Analyst

The Certified Financial Planner Board of Standards (“CFP Board”) - headquartered in Washington, D.C.-is the certifying body for financial planning professionals. It is a non-profit organization that fosters professional standards in personal financial planning through its setting and enforcement of the education, examination, experience, ethics, and other requirements for the CFP certification.

General Function:

CFP Board seeks a highly motivated team player to serve as Business Systems Analyst to manage IT projects; elicit and document requirements from departments; work with partners to develop specifications; develop test plans and coordinate and conduct testing in conjunction with department staff. The candidate will ensure the organization is optimizing its use of business applications; provide recommendations on system improvements to enhance staff efficiency; perform intermediate database queries and resolve business application tickets.

The ideal candidate will embrace open collaboration, possess intellectual curiosity, and help the organization deliver results towards fulfilling our mission.

Essential Functions:

- Assists departments in development of IT project requests to address organizational needs, including business rationale, as requested
- Evaluates IT project requests for complexity and risk and makes level of effort (LOE) and scheduling recommendations
- Manages IT projects as assigned and ensures that the projects are executed using best practices
- Elicits and documents requirements from staff using industry standard techniques, including interviews, document review, business flow analysis, use cases/user stories, and flowcharts
- Assists users with development of test plans for IT projects, and coordinates and executes testing as needed
- Develops database queries as required for business process analyses, project quality assurance, and operational metrics
- Provides consultative analysis services to departments for business process reviews, AMS system use, and maintenance procedures
- Identifies opportunities for continuous improvement and actively promotes business change; presents solution recommendations to business units for their approval.
- Ensures accurate configuration of AMS and assist staff in changes to and testing of configuration
- Works with departments and external partners to investigate and resolve issues with the AMS or other SAAS systems including software bugs, exception handling, user error, automated process failures, and others as required
- Performs other duties as assigned

Background/Skills/Abilities Preferred:

- BA/BS required. Major in Information Technology, mathematics, statistics, accounting, or other degree emphasizing business analysis preferred
- Experience in the Association/non-profit space strongly preferred
- 5-7 years' experience in business analysis, eliciting and documenting requirements, modeling business processes, and developing requirement specifications is required
- 3-5 years' experience in documenting IT test plans and performing IT testing preferred
- 2-3 years' experience with Microsoft SQL Server to include writing queries and reading T-SQL
- Association Management System (AMS) experience (NetForum preferred)
- Customer Relationship Management (CRM) system experience (Salesforce preferred)
- Experience working in an agile SDLC
- Excellent critical thinking, with a proactive approach to identifying issues and presenting solutions and options
- Excellent interpersonal and communication skills (both verbal and written), including strong presentation skills
- Promotes cooperation and commitment within the team; seeks input from others, helps others achieve goals and deliverables, and effectively navigates competing priorities and varying perspectives
- Ability to be flexible, set priorities and meet deadlines in a fast-paced environment
- Consistently attends to details by demonstrating concern for thoroughness and accuracy
- Proven time management skills, and ability to manage multiple priorities

To apply, send your resume and one-page letter summarizing your interest, qualifications, and salary expectations. Please reference the Business Systems Analyst position in your cover letter. Email your application to humanresources@cfpboard.org, Attention: Director, Human Resources, CFP Board, 1425 K Street NW, Suite 800, Washington, DC 20005.

CFP Board believes that diversity of experience and perspective are strengths and seeks to continue to grow a highly committed, skilled, and collaborative staff.