

## AUSTRALIAN ETHICAL INVESTMENT LTD

Client Services and Product  
BUSINESS and DATA ANALYST / PROJECT MANAGER

### **Responsible to**

Head, Client Services and Product

### **Location**

Canberra

### **Employment Basis**

Permanent full time

### **Organisational Environment**

Important role responsible for analysing the company's client facing business processes and data requirements and managing projects for change and improvement in those areas.

### **Scope**

At the direction of the Head, Client Services and Product, responsible for undertaking business and data analysis, managing projects and supporting client services and sales staff in their client facing activities.

### **Key Responsibilities**

- Analysis and improvement of key business processes and data flows to support client service and managed fund registry functions
- In liaison with the Compliance Officer ensure key business processes are compliant with business and regulatory requirements
- Ensure the efficient use of the customer relations management system across the company (currently Salesforce)
- In liaison with the Head, Client Service and Product work closely with the company's outsourced service providers to:
  - maximise the efficiency and accuracy of the company's interaction with them
  - obtain timely and usable customer data from them and to provide analysis of that data for business purposes
- Provide business analysis and database support for data integrity / compliance checking of customer transactions
- As required undertake projects and change management responsibilities including development of project plans and ensuring projects are developed, managed and implemented to required timeframes and budgets
- In liaison with the Head, Client Service and Product identify, develop and maintain management information systems and data warehouse
- Provide support to other areas of the business when required.

### **Qualifications and experience**

- Tertiary qualifications in computer science, database management of similar discipline (requirement)
- Minimum three years post qualification experience (requirement)
- Experience in data analysis and data query specification, particularly using SQL (highly desirable)
- Knowledge of managed fund or superannuation administration systems (highly desirable)
- Experience in a financial services environment (highly desirable)
- Experience with customer relationship management systems (highly desirable)
- Experience with project management methodologies (desirable)
- Knowledge of Salesforce (desirable).

### **Skills and Knowledge**

- Strong business and analytical skills
- Ability to use a wide range of analytical tools and prepare meaningful analysis for decision making

- Ability to describe systems and processes accurately and concisely
- Broad knowledge and understanding of financial service administration systems with particular reference to database and information technology requirements
- Strong oral and written communication, negotiation and problem solving skills
- Demonstrated project management experience and proficiency with MS Project
- Proficiency in standard office software (word processing and financial management systems) and demonstrated high level understanding and ability to use databases to input, extract and analyse data and prepare complex reports and correspondence
- Ability to work independently or co-operatively on data analysis with team members having a range of competencies and disciplinary expertise
- Ability to prioritise work, manage conflicting responsibilities and achieve outcomes within tight time frames
- Demonstrated ability to be resilient in the face of change.

**Personal attributes required**

- Self-motivated and able to work independently including the capacity to exercise a degree of independence and judgement in the performance of own work
- Ability to contribute, encourage and motivate others in a team environment while demonstrating appropriate and professional workplace behaviours
- Responsibility, accuracy and integrity
- Interest in and commitment to environmental and ethical issues.