

# CRM & Analytics Business Analyst

New York

## Company Overview:

Jefferies, the global investment banking firm focused on serving clients for over 50 years, is a leader in providing insight, expertise and execution to investors, companies and governments. The firm provides a full range of investment banking, sales, trading, research and strategy across the spectrum of equities, fixed income, foreign exchange, futures and commodities, and also select asset and wealth management strategies, in the Americas, Europe and Asia. Jefferies Group LLC is a wholly owned subsidiary of Leucadia National Corporation (NYSE: LUK), a diversified holding company.

## CRM & Analytics Team Overview:

The CRM & Analytics team is a highly strategic and cross-functional team responsible for leading the firm's global digitalization effort. This initiative, spanning all client-facing business units and corporate functions, will drive innovation and strategic change through technology, data science, and deep analytics. The team partners with key business leaders and industry experts to build transformational technology to drive revenue, maximize efficiency, and optimize the allocation of resources. The CRM & Analytics team is at the forefront of Jefferies' cloud initiative, leveraging best-in-class cloud-based technologies to replace legacy on-premises solutions to provide intelligent trend insights, actionable opportunities, decision support, and transparency into all client and business-related activities.

## Position Overview:

Business Analysts are responsible for conducting business analysis and documenting business requirements. They will work closely with end users, product managers, UX and other technology partners to develop designs for implementation. In addition, this role will support BAU (e.g., production support (level 3 or 4), small improvements and vendor upgrades.

## Responsibilities include:

- Support product managers on large projects to produce better business outcomes
- Analyze and decompose current state business processes
- Define target state business processes and align functional solutions
- Drive Information gathering activities such as surveying, analyzing and evaluating processes, products and services, by using a variety of internal and/or external data
- Develops and presents documentation supporting project initiatives including business case, project scope, business and functional requirements, user stories and "use cases" in accordance with established service levels and documentation standards.
- Identifying, analyzing, and interpreting trends or patterns in complex data sets
- Assist in coordinating business unit subject matter expert meetings in order to solicit and cross-reference business and functional requirements
- Translate analyses to data stories, identify actionable solutions and recommendations to influence the direction of the business by communicating results to cross-functional groups
- Collaborate with our data engineers, data science algorithm and engineer team to innovate potential data driven products and solutions
- Support product managers(s) in meetings and presentations (e.g. Meeting notes, presentation materials, business reviews / sign-off)
- Ability to track deliverables and ensure items are closed within project timelines (e.g. Action Items, Open Questions, Requirements Sign-Off, Business Reviews, etc.)
- Assist with all phases of SDLC with emphasis on requirements, UAT and Change Management
- Complete assigned project deliverables according to project plan and expected quality.

- Ensure all product documentation, FAQ's, runbooks are captured and up to date
- Work closely with change management and manage user feedback related to CRM & Analytics products and features
- Collaborate with product managers to review and prioritize feedback
- Provide subject matter expertise for new and existing (BAU) products and first response to the production support team for CRM product team

#### **Requirements:**

- Natural curiosity, and enthusiasm for CRM & Data analytics
- 3 - 5 years in a large organization or major consulting organization focused on a Business Analysis within the Equity, Fixed Income or Investment Banking businesses
- Salesforce.com implementation and integration experience, including different business systems as well as working with integration tools
- 3+ years of hands-on analytics experience
- Ability to analyze existing tools and databases and provide software solution recommendations
- High-level experience in methodologies and processes for managing large-scale databases
- Excellent attention to detail and thorough documentation skills
- Proven ability leveraging analytical and problem-solving skills in a fast-paced environment
- Demonstrated ability to leverage analytics into revenue driving initiatives
- Experience collaborating with business stakeholders, business process owners, technical project managers and technical teams to execute business analysis tasks
- Drive and desire to learn and grow both technical and functional skill sets
- Inquisitive and continuously focused on identifying inefficiencies and improving business processes
- Excellent interpersonal skills and ability to thrive in a collaborative environment
- Goal-orientated, self-motivated and adapts to changing situations
- Strong presentation, communication (written and verbal) skills, and interpersonal skills; must be detail orientated
- Proficient in Microsoft Word, Excel, PowerPoint, Project, Visio, SharePoint as well as other project management and time tracking tools
- Salesforce Certifications and SQL Knowledge (Plus but not required)