



**Job Title:** Business Intelligence Associate  
**Department:** Risk Advisory Services  
**Reports to:** Business Intelligence Services Team Leader  
**Status:** Exempt  
**Updated:** June 2022

### **Summary of Responsibilities:**

The Business Intelligence (BI) Associate will work with the BI Team and internal and external stakeholders to create and implement Business Intelligence Solutions. The Business Intelligence Associate will meet with all stakeholders to understand the data needs and requirements of the solution, develop and test the solution, review with stakeholders, and facilitate onboarding/training of users including follow-up support. The BI Associate will be responsible for communicating with stakeholders and the BI Team Leader on status of projects including any findings via email, messaging, in-person, or on video call. The ideal candidate will show willingness and enthusiasm to develop new product offerings under the Business Intelligence Solutions service line, working alongside the Business Intelligence Team Leader. They will also need to be self-disciplined and able to work independently.

### **Essential Functions:**

- Work with various industry leaders in the firm to understand the requirements to develop new business intelligence solutions for future client use.
- Work with clients to understand their needs and the best business intelligence solution for them.
- Build business intelligence solutions using data analytics tool, Alteryx, and data visualization tool, Qlik. Including extracting, transforming, and loading data.
- Present business intelligence solutions to clients, including assisting in onboarding/training of users and follow-up support.
- Work with the business intelligence team leader to develop new product offerings including the processes, tools, and templates to create standardized deliverables in an efficient way.
- Complete all tasks assigned in a timely and efficient manner according to instructions.
- Follow all professional standards.
- Address client needs/requests as necessary.
- Develop technical expertise.
- Participate in job planning sessions understanding the need for consistency on jobs as well as customization.
- Actively establish plans to meet deadlines in advance and maintain accountability for self and client-assigned tasks keeping appropriate team members informed of progress.
- Complete administrative duties timely (i.e., time entry and tasks list).
- Set individual goals that support departmental and firm goals.
- Perform other duties as assigned.

### **Education, Experience, and Skills:**

- Bachelor or Master's degree in Analytics, Business Intelligence, Accounting with Data Analytics, CIS, Computer Science or similar.
- 1+ years of SQL & Python coding experience, as well as visualization experience with Tableau or Power BI.
- At least one year of prior work experience in the data domain, via internship or full-time role.

- Working knowledge of Microsoft Office.

**Expectations:**

- Respect and earn the respect of fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with manager and partners.
- Perform work with confidence and pride, follow through to completion.
- Dependable.
- Make informed decisions – discuss with manager when needed.
- Grow and learn from past mistakes.
- Work in a safe, clean and employee friendly atmosphere.
- Work personal/professional development plan

**Working Conditions:**

- Minimal hazards. General office working conditions.
- Travel may be required from time to time.
- Occasional heavy lifting.
- Periodic evening and/or weekend work.

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this job. It is not intended to be an exhaustive list of all duties and responsibilities required of individuals in this job. Other duties may be assigned as determined by management. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities of this job.

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, nursing and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic information, disability, or any other protected status in accordance with all applicable federal, state and local laws.

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