

49 Financial is a financial planning firm founded in Austin, TX. We currently have offices in Austin and Dallas, Houston, and Atlanta.

At 49 Financial, we implement "Two are Better than One" in everything we do. Our firm strives to provide you the support that you need when getting started in this challenging industry and career. Through our training, mentorship, and leadership development programs, we accelerate your learning experience so you're well-equipped to create substantial impact.

We believe in the power that comes from planning for finances together, rather than alone, for both our clients and our associates.

## Job Description

The Data Analyst works under the guidance of the Operations leadership, reporting to the Director of Field Operations, but working very closely with the SVP of Operations and the Solutions Architect. The primary focus of this role is to provide best in class analytics and data management practices within a quickly growing sales organization. In addition to exceptional technical skills, a candidate for this role must exhibit extraordinary attention to detail, project management skills and cross-functional communication.

The right candidate will be detail oriented to ensure data trustworthiness, conduct proactive and positive interactions, standardize best practices while flexing with new innovations, solve problems big and small, question the status quo, and at times, be the face of the Operations team to new hires, advisors & leaders. This role will work closely with multiple teams across the organization as we continue to grow and scale. As a key subject matter expert on field data and metrics, the Finance, Marketing, and Field teams will depend on your insights.

## Responsibilities

- Set realistic deadlines and strategize daily, weekly, monthly and quarterly progress through reports, presentations and briefs against the team and corporate objectives.
- Work with management (including the CEO/CSO) to prioritize business and information needs.
- Maintain regular weekly and monthly reporting at program and corporate levels that have cost, production, and financial implications. A dedication to thoroughness is imperative.
- Conduct ad hoc analyses to determine the causes of newly emerging trends or field insights and provide recommendations on how to solve problems or improve the current situation (good or bad) to achieve continuous improvement.
- Identify, analyze, and interpret trends and patterns in complex and varied data sets.
- Establish new field operations metrics to track achievements toward goals like conversion ratios, pipeline health, sales cycles, client satisfaction, retention, and forecasting.
- Conduct basic and ongoing sales process training sessions for advisors, in addition to providing ad hoc support.

## Required Qualifications

- 0-3 years of experience as a Data Analyst or Business Data Analyst.
- Competent in SQL, Visual Basic, or similar scripting tool set, and has experience with relational databases with a demonstrated pattern of curiosity and problem solving.
- Strong analytical skills with the ability to collect, organize, analyze and disseminate significant amounts of information. Can translate jargon into clear and concise information.
- Excellent verbal and written communication skills with a problem-solving attitude
- Attention to detail to ensure all specifications are met.
- Organization and time management to manage multiple tasks, sometimes for multiple projects, at once.
- Exemplifies the values of 49 Financial.
- Ability to multi-task and meet deadlines in a dynamic and fast-paced environment, while maintaining high quality standards to meet company goals and objectives.
- Communicates and works well with individuals, teams or groups in a respectful and honest way that reflects our core values.

## Preferred Qualifications

- BS in Mathematics, Economics, Computer Science, Information Management or Statistics
- Previous work experience on a sales operations team.
- Has excellent interpersonal skills and can communicate with and lead field executives.
- Strong interpersonal skills, ability to find win-win outcomes.
- Track record of continuous personal and professional growth and education.