CREATIVE PLANNING

Title: Business Intelligence Analyst

Location: Overland Park, Kansas

Job Description: **JOB SUMMARY**

The Business Intelligence Analyst at Creative Planning works on the business-facing side of the data engineering team, interacting regularly with stakeholders to understand data needs and interfacing with engineers to ensure that the data platform is designed and maintained in a way that aligns with those needs. The BI Analyst supports data delivery by writing queries, creating reports and dashboards in Power BI, and defining data so that users can query it intuitively via LLM.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Develop deep understanding of business data, where it comes from, how it is used, and the relevant teams who are using it.
- Interact with data consumers and stakeholders to identify and translate data requirements.
- Design, develop, and maintain Power BI dashboards, reports, and visualizations that give stakeholders timely, accurate insights. Build automated, dynamic reports for internal teams.
- Maintain data definitions and structure in the semantic layer to support LLM integration, based on the metric definitions and data dictionary.
- Validate data outputs (including accuracy of LLM consumption), identifying and resolving discrepancies, and driving quality issues to resolution by fixing them in the semantic, reporting, and data definition layers, raising ingestion and transformation issues to engineers, and working with business teams on source system data problems.
- Build and optimize semantic models and measures on top of curated datasets, following the semantic model strategy and standards set by Analytics Engineers.
- Query and explore data in Azure Databricks and SQL Server to support analysis, and refine curated datasets.
- Manage the report lifecycle, including user training, documentation, usage monitoring, and retiring outdated reports.
- Identify opportunities to automate recurring reporting and reduce manual effort across teams.
- Collaborate with teams across the firm to understand their data needs and support firm-wide objectives.

- Support data governance and security practices, including appropriate handling of sensitive client and firm data.

REQUIRED QUALIFICATIONS / EXPERIENCE

- Bachelor's degree in Data/Computer Science, Finance, Business, or a related field.
- 2+ years of experience in business intelligence, data analysis, or a similar analytical role.
- Proficiency with Power BI, including dashboard design, data modeling, and DAX.
- Proficiency with SQL for querying, joining, and manipulating data.
- Exceptional communication skills, with the ability to translate complex findings into clear, actionable insights for non-technical stakeholders.
- Strong attention to detail and commitment to data accuracy.
- Ability to work independently and collaboratively in a fast-paced environment.
- Commitment to teamwork and excellence.
- Motivated and results oriented.
- Available to work outside of normal business hours when required.

PREFERRED QUALIFICATIONS / EXPERIENCE

- Familiarity with Azure Databricks and SQL Server.
- Exposure to Azure Data Factory and other tools in the Azure data ecosystem.
- Experience with Python or PySpark for exploratory analysis.
- Experience with wealth management data such as portfolio, performance, and CRM data.