



## **Technology Analyst (Salesforce)**

Do you enjoy solving technology problems and helping others? Do you have Salesforce administration experience? If so, then this may be your next career position!

Fragasso Financial Advisors is a Pittsburgh-based wealth management firm. We are passionate about creating an exceptional client experience, and we have been helping clients work towards their financial goals since 1972.

**This position is based in Pittsburgh, PA, with a hybrid, remote work schedule. We are seeking a dynamic individual that enjoys problem solving and helping others. Key responsibilities for this position include:**

- Serve as the internal CRM (Salesforce) champion and a point of contact with external software vendors
- Maintain and enhance visual layout, workflow rules and business logic layer to streamline and enhance business processes and improve user experience
- Perform administrative functions including adding/removing users, changing security, managing data feeds, coordinating integrations with internal and external systems, updating data values, adjusting workflows, creating new reports/dashboards, etc.
- Provide end user support by troubleshooting and resolving system issues
- Assist in the process of defining new Operations procedures and refining existing ones
- Manage IT vendor relationships to review proposed solutions and obtain their support
- Prepare, create, and deliver effective training
- Provide comprehensive end-user support to facilitate smooth IT services
- Provide technical support for requests relating to accounts, services, hardware, and software
- Manage/maintain/support CRM & cloud software backups and restore data when needed
- Manage/maintain/support/provide training on password manager

**We are seeking someone able to work autonomously and perform efficiently in a fast-paced, changing environment, while handling a wide variety of tasks. To succeed in this position, you must also have a passion for creating an excellent customer experience. To be considered for this position, you should possess the following qualifications:**

- Salesforce administration experience required; Salesforce Admin Certification preferred. Experience should include configuring Salesforce functions such as custom objects, custom settings, profiles, roles, permission sets, Flow, action plans, validation rules and workflows
- 3+ years customer service experience in a helpdesk or desktop support role
- Associate degree or higher in Computer Science or I.T. (Business major is acceptable)
- Experience managing a large relational database, CRM system, and other related business applications, preferably in the financial or related industries
- Strong business analysis and functional experience, including requirements gathering, critical review of requests, development, and deployment of solutions
- Demonstrate a positive 'can do' attitude with the ability to engage staff
- Strong project management skills

- Ability to identify issues/opportunities and recommend solutions
- Detail-oriented with the ability to rapidly learn and take advantage of new concepts, business models and technologies
- Ability to train users and host department training on applications, including troubleshooting application administration/management

At Fragasso, we believe in giving our team members an exceptional work experience. In addition to remote work opportunities and a generous time off program, we offer an excellent benefit package, including medical, dental, vision, life, 401k/profit sharing and an Employee Stock Ownership Plan!

Fragasso Financial Advisors also received “Best Places to Work” awards last year by the *Pittsburgh Business Times* and *Investment News*.

**Qualified candidates may send their cover letter and resume to [gpond@fragassoadvisors.com](mailto:gpond@fragassoadvisors.com)**

*Fragasso Financial Advisors is an Equal Opportunity Employer.*

*Investment Advice offered through Fragasso Financial Advisors, a registered investment advisor.*