



Title: Business Intelligence Analyst
Location: New York, NY
Department: Sales
Reporting To: Head of Client Business Intelligence
FLSA Status: Exempt

Summary: The role will help the organization manage data, build reporting (including visualizations), enhance CRM (Salesforce) capabilities and produce analytics that empower business decision-makers. The BI team broadly works within the sales organization to utilize data to drive business outcomes and enhance sales productivity by developing and communicating insights to key stakeholders. The ideal candidate has a strong willingness to learn, ability to leverage technical skills, and a solid understanding of business strategies, priorities and initiatives. Additionally, demonstrates an understanding of multiple databases, data flows and relationships across various sources. Has a strong ability to build collaborative relationships and communicate effectively with business and IT leaders, project members and vendors to assure success. Lastly, able to work with changing priorities and new project assignments as they arise.

Essential Duties and Responsibilities:

Includes the following, but are not limited to:

- Collaborate to develop and communicate actionable insights to key stakeholders including Sales teams, Sales leadership and Marketing
- Aid current state assessments by collecting information on data sources, data flows, information consumption, and information production
- Design and development of metrics, reporting, visualizations, dashboards and CRM enhancements to support the sales organization
- Assist in the reporting, calculation and troubleshooting process for sales compensation
- Proactively analyze data to answer key questions from stakeholders and generate views on what drives business performance, efficiency and productivity
- Leverages business knowledge, coupled with technical skills, to offer solutions and work in partnership with both business and IT to deliver technology-related outcomes
- Troubleshoots reporting, business intelligence, data and CRM-related issues
- Develop business automation and process reengineering

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily.

Supervisory Responsibilities: This job has no supervisory responsibilities.

Experience/Education:

- One to three years of financial services industry experience
- Bachelor's degree with a preference for Finance, Business, or Analytics
- Fundamental understanding of the asset management industry is valued
- Experience in data aggregation and analysis within an asset manager

Qualifications:

- Strong hands-on Excel skills with the ability to learn other analytic tools
- Proficient with data management conventions and best practices
- Familiarity with, or willingness to learn, PowerBI, SQL, and combining datasets using visual ETL tools or coding experience
- Proficient in design and implementation of digital dashboards and static reports
- Familiarity with CRM systems, particularly Salesforce.com
- Exceptional interpersonal skills and ability to collaborate across departments
- Ability to interact effectively and objectively with all levels of the organization
- Strong communication skills – able to communicate clearly, effectively and in a timely manner
- High attention to detail, excellent analytical and critical thinking skills
- Self-motivated and intellectually curious
- Professional demeanor

Compensation:

- If this position will be performed in whole or in part in New York City, the base salary range is \$75,000 to \$90,000. Individual salaries may vary based on different factors including but not limited to, skills, experience, job-related knowledge, and location. Base salary does not include other forms of compensation or benefits offered in connection with this position.

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