

PriceMetrix focuses exclusively on improving the overall business of investment firms by helping individual financial advisors to become better 'CEOs' of their business. *PriceMetrix ValueOne Program* is a patented combination of personalized intelligence reports, practice management tools, and expert services designed solely to enable advisors and managers, at all levels, to proactively identify and close client, product and pricing opportunities.

PriceMetrix customers typically realize increases in assets, revenue and fee-based advisory business, as well as, improvements in household quality and pricing.

Founded in 2000, PriceMetrix has its principal place of business in Toronto, Ontario, and services a broad range of clients within Canada and the United States.

Integration Analyst

Position Profile

The Integration Analyst at PriceMetrix is responsible for transforming client data into meaningful information. Based in Toronto and reporting to the Vice President of Integrations, the Integration Analyst works within the Implementation Team to guide clients through all technical aspects of the new client setup process from implementation kick-off to program launch. The role of the Integration Analyst is hands-on, proactive, creative, and highly numerate.

The successful candidate can expect to drive all aspects of the technical integration phase within an implementation including:

- Facilitating meetings with clients to gather client information, and developing a thorough understanding of a client's business and operational processes
- Data gathering, analysis and troubleshooting
- Apply business systems analytics in reviewing client data for the purposes of preparing a summary analysis and functional specifications
- Leveraging understanding of database concepts, create and execute SQL queries
- Liaising between technical and business staff both internally and at the client
- Provide expert consultation/subject matter expertise, and investigate alternate solutions when issues are encountered to assess impact to the firm
- Providing guidance to clients on program configuration decisions related to technical integration
- Completion of quality assurance activities and test reporting processes
- Providing input into and assisting in the maintenance of the overall implementation project plan
- Continually monitor industry, technology, and competitive developments and assess impact to firm
- Ensure consistent and standard application of the project management methodology at all times in order to ensure project success
- Promote project success quality by ensuring assigned activities are delivered on time, on budget, with high to the satisfaction of the client
- Conduct meetings and facilitate client presentations as required to communicate project objectives, and manage client expectations

- Identify and recommends new policies, methodologies and standards as required to improve the quality of deliverables

The role of Integration Analyst requires a unique individual who can balance a client's front and back office capabilities and nuances with the functions and characteristics of the PriceMetrix system architecture. In addition to new client setups, the Integration Analyst also has responsibility for managing the intake and implementation of data enhancements for existing clients.

Position Qualifications

The successful candidate will be able to demonstrate:

- Experience in a Business Analyst or Integration Analyst type role, ideally supporting medium/large scale ASP integration efforts
- A passion for superb product delivery and customer service and an appreciation for the need for a positive end-user experience
- Strong technical proficiency, including extensive experience with relational database environments, MSSQL, MS Access, MS Excel, and VB
- Good understanding of database concepts
- Exceptional analytical rigor and proven problem solving skills
- Ability to gather, elicit and document information from a variety of sources
- Comfort and experience dealing with large amounts of data
- Experience in testing and troubleshooting applications
- High attention to detail
- Ability to set, prioritize, and meet deadlines
- Strong written, verbal and listening skills
- Good presentation skills
- Facilitation and relationship building skills
- Ability to work effectively on team projects
- Comfort with occasional travel
- Post secondary education in a business related or technical discipline.

In addition, the following skills are not required, but highly desired:

- Familiarity with financial data and applications
- Experience working in retail brokerage, outsourced financial, or back-office industries
- Previous implementation or process consulting experience
- Financial services background and/or industry certification

Expected Corporate Standards

Every employee of PriceMetrix and the successful candidate are expected to:

- Approach work in a collaborative manner: offer expertise readily and assist team members in accomplishing individual and collective tasks,
- Display initiative around their training and that of others, and actively pursue professional development opportunities,

- Offer and respond to feedback in a constructive manner,
- Think critically and be open to new approaches and 'better ways' – avoid taking the path of least resistance,
- Challenge our Clients, their colleagues, and themselves in the interest of making them more successful,
- Respond to business demands with urgency, and be calm and reasoned during pressure and crises,
- Exhibit pride and ownership in the quality of our services and products,
- Have personal respect for their colleagues and professional respect for everyone's role in our success,
- Represent the firm to Clients, prospects, vendors and candidates professionally,
- Treat Client information, and information about our businesses, in confidence,
- Communicate clearly in English.

Application Instructions

Interested candidates should submit their application to the recruiting team at recruiting@pricemetrix.com