Example of Business Specialist Job Description

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Our growing company is searching for experienced candidates for the position of business specialist. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for business specialist

- Lead self-inspections to confirm current compliance status and work with management to determine a mitigation strategy for instances of non-compliance
- Develops and fosters business relationships with government agencies, customers and other security officers
- Perform system configuration, as needed, to enable the required functions
- Interact with internal business and external vendors as required
- Administer and synthesize user support documentation, provide training and coaching to end users
- Strategize communication venues, draft and distribute pertinent information through regular distribution channels (website messaging, conference calls/presentations, flyers, memos, newsletters, meetings)
- Complete a variety of project assignments within structured deadlines (business case, budget, requirements gathering, test plan creation, functional testing)
- Utilizing internal and external data sources, research account size, ownership structure, affiliations, class of trade and other attributes to prepare opportunity lists for sales and account executives
- Communicate new sales opportunities to a variety of audiences through spreadsheet documents, presentations, meeting participation and one-on-one conversations
- Execute a wide range of both quantitative and qualitative analyses (e.g., evaluation of historical customer purchases to identify contract opportunities,

Qualifications for business specialist

- Highly proficient with MS Office suite with an emphasis on Excel (Formulas, Macros, Conditional Formatting, Pivot Tables)
- Exceptional degree of ingenuity, creativity, and resourcefulness
- Demonstrated breadth and depth of experience to influence highly independent and entrepreneurial employees Senior Managers within Wealth to adopt, leverage and perfect use of technologies supporting the client experience
- Demonstrated ability to successfully lead projects and/or initiatives impacting the client experience
- Understanding of regulatory requirements associated with portfolio/asset management and discretionary management across various Wealth Management channels
- Detailed experience with Wealth Management Technologies a requirement