



## Microsoft 365 Analyst

RGF Integrated Wealth Management is an independent integrated financial services firm with over 60 employees, located in Vancouver.

The primary focus of the role is the internal support of our Microsoft 365 ecosystem. This mid-level position is an excellent opportunity for someone already active in M365 administration that is looking to take the next step into an operations/business analyst role with hands on mentorship from our internal team members and experienced consultants.

This varied role includes data management, project work and change management including upgrade cycles. You will work with our managed services IT provider and a Dynamics CRM vendor. Training will be provided, however, a strong foundational knowledge of Microsoft 365 and Azure cloud solutions is essential, with demonstrable experience in successfully supporting Microsoft 365 products. Successful applicants should be comfortable with providing friendly and efficient support to end users and generally making a difference.

Key systems include Azure AD, Dynamics CRM (with ClickDimensions integration), SharePoint, Outlook, Power Automate, Teams (with Cisco integration), and Active Directory. Current projects include a cloud data warehouse using Azure SQL and Power BI, Microsoft Purview and Co-Pilot. We expect that over time support in this area will become an increasing part of this role.

Key responsibilities include:

- Change management on our technology platform with a heavy focus on Microsoft systems including Outlook, Teams, SharePoint, Dynamics CRM and AD Groups
- Upgrades and their associated testing and implementation planning
- License management and invoice reconciliation
- Assuming the support of numerous workflow and Power Automate scripts
- Monitoring / managing Cloud storage (SharePoint, Dynamics, Teams, Azure SQL etc.)
- Adoption of new M365 solutions and processes including working with our training specialist for delivery and creation of training plans, materials, and documentation
- Internal user support for incidents escalated from the managed services provider helpdesk and resolve system/application issues
- Explore ways to scale Microsoft's offering, such as with the Power Platform, within the organization based on business opportunities and other technical innovations
- Working with various providers for setup, maintenance, changes, troubleshooting and issue tracking

- System upgrade management including test plan creation and execution
- Various data administration activities (data extracts, clean-up, reporting and reconciliation) across multiple systems
- Documentation and maintenance of administration procedures
- Various other project, administrative, and operational tasks as required



This position offers the right candidate the opportunity for growth and expansion of job duties allowing them to increase their knowledge and gain experience in the areas of operations, administration, and technology. *The role provides ample opportunity to pursue Microsoft Certifications; be they M365, Azure, Power Platform or Dynamics 365.*

## Job Requirements

- Minimum 5 years IT experience, with 2 years of professional administrative experience
- Demonstrated ability to leverage modern Microsoft 365 productivity tools and share best practices with users
- Experience in a client service or support position
- Ability to work in a team
- Highly organized with ability to work in fast-paced environment
- Excellent command of written and spoken English
- Minimum typing speed of 50 wpm

## Benefits

- Comprehensive Health and Dental Benefits
- Health Care and Taxable Wellness Spending Accounts
- Continuing Education Opportunities, Employee Assistance Program, Life insurance
- Three weeks of Vacation per year as well as paid personal days
- RRSP matching
- Monthly engagement events and activities
- 2 days per week WFH after 6 months of employment
- Flex days program after 1 year of employment

Salary: \$80,000 per year

Applications can be submitted via LinkedIn by clicking [here](#).

Please note that only those applicants selected for an interview will be contacted.