

Position Description

Position : **Technical Operations Manager**
Revision Date : December, 2018
Status : Full-time, Hourly, Exempt, At-Will
Supervisor : Troy Waters, Director of Technology, Senior Partner

This is a summary outline of the responsibilities required of the **Technical Operations Manager** with HoyleCohen, LLC. This description may be modified as determined appropriate to meet the changing business needs.

SUMMARY

The **Technical Operations Manager** plays an integral role in the future growth and development of the firm by ensuring secure, efficient, effective utilization of technology. The role will be approximately 75% Operations Management and 25% IT Support with specific areas of responsibility including, but not limited to the following:

Operations Management:

- Identify pain points and inefficiencies to improve productivity and set us up for future growth
- Develop, streamline, document, and implement workflows, dialogues and procedures through technology utilization to improve efficiency and ensure consistency across the firm
- Ensure accuracy of system data and settings through regular maintenance and audits
- Facilitate accurate and timely reporting through efficient use of the firm's technology
- Become subject matter expert on Tamarac suite, including Reporting (Advisor View) and CRM and stay current on product enhancements

Information Technology:

- Provide ongoing technology training to staff and help to resolve any technological issues
- Coordinate with managed IT provider to ensure appropriate measures are taken for strong cybersecurity, disaster recovery and SOX compliance
- Coordinate with systems and technology vendors and act as an in-house point of contact
- Provide onsite desktop/network support as needed

Other Responsibilities:

- Manage Tech Ops Associate(s) by setting goals, tracking results and evaluating performance
- Promote efficient, open and positive communication with internal staff
- Facilitate technology integrations, including data conversion, implementation and training, for occasional acquisitions of outside advisory practices

REQUIREMENTS & QUALIFICATIONS

- 5+ years' experience in operations related role at an RIA strongly preferred
- Bachelor's Degree with emphasis in business, finance or computer-related field preferred
- Must have strong proficiency with Microsoft Excel
- Self-motivated, natural problem solver with strong managerial skills
- Excellent attention to detail, organizational skills and ability to achieve goals under pressure
- Strong written and verbal skills communicating technical information to clients and peers
- Service-oriented, energetic and team player with a willingness to pitch-in where needed
- Must embrace a collaborative work environment and work effectively with other departments