



**CREATIVE
PLANNING®**
TECHNOLOGY SOLUTIONS

Title: Sales Admin

Location: Overland Park, Kansas

Description: **About Us**

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

Creative Planning is revolutionizing the wealth management industry by providing comprehensive financial planning and investment management services under one roof. Our innovative approach extends to our cutting-edge IT solutions, where our Managed Service Provider (MSP) team plays a crucial role in keeping our clients at the forefront of technological advancement.

As a division of Creative Planning, we have the unique advantage of focusing solely on delivering exceptional service without the typical MSP pressures. This allows us to build something truly special:

Our People & Leadership

- **Authentic Leadership:** Our management team leads rather than manages, taking feedback to heart and supporting your growth while avoiding micromanagement
- **True Team Environment:** We don't just talk about teamwork – we live it. Our technicians actively support each other, share knowledge, and collaborate across teams
- **Thoughtful Communication:** We protect focused work time while maintaining strong collaboration. We favor clear, written communication over impromptu calls, enabling deep work and thorough documentation

Our Approach to Growth

- **Technical Breadth:** We're one of the few MSPs with deep expertise in both Windows and Mac environments, offering diverse technical challenges
- **Continuous Learning:** We encourage self-study and professional development, providing opportunities to work with cutting-edge technologies
- **Career Advancement:** From participating in premium client teams to leading SMB accounts, we offer multiple paths for growth

Our Client Philosophy

- **Relationships First:** Technical solutions are just a byproduct of understanding client needs and being their trusted advisor
- **Balance of Independence:** While we collaborate as a team, we trust our professionals to take ownership and work independently

- **Deep Work Philosophy:** We maintain strong client relationships while protecting focused work time through thoughtful communication practices

Our Rewards & Benefits

- **Results-Focused Culture:** We skip the pizza parties in favor of meaningful recognition through raises and bonuses
- **True Remote Freedom:** Enjoy the flexibility of genuine remote work with the option to use office space when needed
- **Shared Success:** When we double our revenue, the whole team celebrates with a company-sponsored trip – including flight allowance, hotel accommodations for you and a guest

The Opportunity

We're looking for a **Sales Admin** to be the operational backbone of our client solutions team. This entry-level position is perfect for someone who thrives on organization, loves solving logistical puzzles, and wants to learn the technology services business from the inside out.

You'll work closely with our Technology Account Managers and vCIOs, handling everything from creating quotes and managing vendor relationships to ordering equipment, tracking inventory, and coordinating shipments. This isn't just order processing - you'll be learning about technology solutions, building vendor relationships, and understanding how MSPs operate.

As you master the fundamentals of equipment procurement, vendor management, and inventory control, you'll have a clear path toward growing into a Purchasing Manager role. You'll gain exposure to the full lifecycle of client technology solutions and develop the vendor relationships and operational knowledge that form the foundation of strategic procurement.

This role reports to our Support Services Manager and works in-person at our office, where you'll coordinate directly with technicians and collaborate with teams across the division.

What You'll Do

Quoting & Vendor Relations

- Research and create detailed quotes for Technology Account Managers and vCIOs across multiple vendor platforms including Ingram Micro, Dell, TD Synnex, B&H Photo Video, and CDW
- Deliver quotes directly to clients when requested by account managers
- Win approved opportunities and convert them into sales orders and service tickets
- Create new opportunities from pre-sales tickets when the team needs backup
- Build relationships with vendor representatives to stay informed about product availability and pricing

Equipment Ordering & Receiving

- Process equipment orders through our PSA system, following the purchasing approval, purchasing, and receiving workflow
- Receive incoming equipment or pull general stock from the correct warehouse, updating counts in both our PSA and NetSuite
- Convert warranties and licenses into system configurations as client equipment arrives
- Label equipment with the client name, ticket or project, and assigned tech before placing it on the service or project rack
- Proactively let technicians know when equipment has arrived, been delayed, or has more on the way

Inventory Management

- Track all client and general stock leaving the building, including quantity, item, technician, ticket number, client, return dates, and serial numbers
- Record serial numbers in ticket internal notes when they aren't captured under the product or PO
- Conduct quarterly inventory audits so physical counts match our PSA, with extra care before the fiscal year end
- Adjust negative on-hand inventory in the Product Catalog at the end of each month
- Update client inventory spreadsheets and platforms, including asset tags for new computers
- Manage secure storage areas for client stock, general stock, and technician tools

Shipping & Logistics

- Weigh, measure, and create shipping labels for client equipment
- Coordinate shipments through UPS, USPS, and FedEx including in-person drop-offs when needed
- Follow up on shipping delays and client concerns, from picking up at distribution centers to calling out-of-state pickup locations
- Keep shipping boxes and materials organized and break down boxes that are no longer usable

Operational Support

- Learn and support backup schedule creation for client coverage using platforms like Cove and Datto
- Procure specialized software licenses from vendors like ForensiT and 2BrightSparks
- Add licenses in Pax8 and manage Egnyte Power Users when teammates are out
- Relay client requests to the dispatch team or account managers
- Order equipment and supplies for technicians and the office, from printer paper to monitors for remote work
- Upload receipts for Ramp expenses charged to the company card

Office & In-Person Support

- Welcome visiting Creative Planning employees and clients and help them find their way
- Receive in-person equipment drop-offs from clients and create or update the related tickets
- Scan and route headquarters mail and seasonal 1099 documents
- Print Device Intake Forms for our e-waste recycling program as needed

Technical Skills & Experience

- Strong organizational skills with meticulous attention to detail
- Comfortable learning new software systems and vendor platforms
- Excellent written and verbal communication skills
- Experience with inventory management, order processing, or logistics coordination preferred but not required
- Basic understanding of technology hardware and equipment helpful
- Ability to lift and move equipment up to 50 pounds
- Valid driver's license for local shipping runs
- High school diploma or equivalent required; some college coursework preferred

What Sets You Apart

- **Process Oriented:** You naturally create systems to track details and ensure nothing falls through the cracks
- **Proactive Communicator:** You keep people informed before they have to ask, especially about delays or issues
- **Problem Solver:** When shipping is delayed or inventory doesn't match, you dig in to find solutions rather than waiting for instructions

- **Tech Curious:** You're interested in learning about technology hardware and software beyond just processing orders
- **Team Player:** You understand your role supports the entire team and take pride in enabling others to succeed
- **Growth Minded:** You see this as a stepping stone to learning the business and developing into purchasing management
- **Adaptable:** You handle competing priorities and last-minute changes without getting flustered