



Product Specialist II

JOB SUMMARY/OBJECTIVES:

This individual monitors all aspects of a product lifecycle, including long and short-term development and marketing in alignment with strategic direction defined by senior leaders. The Product Specialist stays abreast of trends in the marketplace to ensure the product's competitive position, provides level 2 support, marketing and product sales support, core conversions & product installations, documentation, training, quality assurance, compliance, market research, business analysis, defect and feature prioritization and participation in the software development lifecycle of the product. This individual interfaces well with clients, senior leaders, client support, project managers, technical leads, engineers and clients to determine the product's future direction and success with our current and prospective clients. **Travel Required:** Potential for 25% travel.

ESSENTIAL FUNCTIONS:

Management of Products

- Develops business plans for product lines that achieve company revenue, profitability and market penetrating goals; including, marketing, sales, cross-sales opportunities, field training presentations and demonstrations; accurately assesses risks associated with each solution design/project.
- Gathers requirements and documents accurate, detailed and thorough business requirements, analyzes requirements to determine compatibility of business needs and existing product functionality.
- Prioritizes enhancements for SDLC processes and coordinates product development cycle.
- Creates and maintains Business Cases in a timely manner for both cores and ancillary applications.
- Ensures compliance with federal and industry regulations for changes affecting the product.
- Develops in-depth knowledge of competitive products, evaluates 3rd party solutions for fit with VISIFI products; acts as end-user advocate; provides concept and approval of design for products.
- Serves as a member of the Product Advisory Team and leader of focus groups within the area of responsibility; participates, as needed, in customer and sales prospect meetings, Client Conference or other meetings.
- On-site product support as needed to evaluate utilization of products.

Software Core Conversions and Product

- Develops conversion specs for installation/conversion/de-conversion activities as assigned and installs third party products and completes special projects as needed.
- Ensures on-time, on-budget, and in-spec delivery of projects.
- Provides quality assurance for conversion data, including, testing, setting up procedures and supporting customers from onset of the conversion project and 30 days following implementation.
- Provides training in person or via webinar (as required) during implementation and any follow-up onsite support as needed.
- Works with 3rd party vendors to help facilitate and resolve issues when needed.
- Ensures EOM/EOQ/EOY Standard Testing as required (dividends, statements, EOY releases, tax remittance readiness).
- Afterhours phone support and travel as assigned.
- Other duties as assigned by manager.

Quality Assurance and Testing



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- Identifies, analyzes and documents problems with program function, output, online screen or content and enters into JIRA for tracking.
- Monitors bug resolution efforts and track successes.
- Other duties as assigned by manager.

Training & Documentation

- Analyzes training needs of employees and customers.
- Develops content and instructional materials for training.
- Reviews software documentation to ensure technical accuracy, compliance or completeness.
- Delivers specialized training on assigned products to the VISIFI corporate trainer to effectively train customers and employees; serves as a training back-up when required.

2nd Tier Product Support

- Assists with research and resolution of complex and escalated cases.
- Works with 3rd party vendors to facilitate and resolve issues when needed.
- Performs billable customer work and other projects as designated.
- Coordinates and assists in testing for product offerings as needed (including after-hours).
- Afterhours phone support as assigned.
- Performs other duties as assigned by manager.

TECHNOLOGY USED:

Salesforce

JIRA

Microsoft Office Suite, including Outlook, Teams and Excel

VISIFI applications as required

KNOWLEDGE, ABILITY AND SKILLS:

- Wide knowledge of core banking systems and business applications, with in-depth experience in one or more specific areas such as lending, deposits, payments, business banking and BI/Analytics.
- Reporting skills, analytical skills, technical research skills, written and verbal communication skills, organizational skills, general math skills, data entry skills, Microsoft Office skills, self-development, financial skills, attentiveness to detail and accuracy, listening skills.
- Ability to select and using training/instructional methods and procedures appropriate to increase the skills of customer and corporate resources alike.
- Ability to exercise independent judgment; set priorities and manage multiple projects.
- Ability to partner with clients and communicate with all levels of staff, including CEO, CFO, COO.
- Ability to conduct demos to highlight positive features of the product and the product's ability to enhance client's performance
- Strong passion for accounting and general ledger and interacting with clients



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COMPETENCIES:

- **Communication** – Excellent communication skills, both written and verbal.
- **Time Management**- Ability to prioritize work items.
- **Adaptability** – Adapts to changes in the work environment; manages competing demands; changes approach to best fit the situation; deals with frequent change, delays or unexpected events.
- **Initiative** - Volunteers readily; Undertakes self-development activities; Seeks increased responsibilities; Takes independent actions and calculated risks; Looks for and takes advantage of opportunities; Asks for and offers help when needed.
- **Teamwork** - Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale.
- **Problem Solving** - Identifies and resolves issues in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; works well in a group problem solving situation.
- **Leadership** - Provides guidance, development goals and motivates team members to perform at a high level to meet customer needs.
- **Market Knowledge** – Understands the basics and trends and anticipates change in the industry.

WORK ENVIRONMENT:

Work is performed in an office environment and involves everyday risks or discomforts which requires normal safety precautions. A moderate amount of overnight travel is possible for this position (less than 25%).

PHYSICAL DEMANDS:

Work is essentially sedentary with occasional walking, standing, bending, carrying items under 25 pounds such as books, papers, small parts, etc.

COMPENSABLE QUALIFICATIONS:

- Bachelor’s Degree (or equivalent product experience). Minimum of seven years’ experience in the financial industry with a credit union, bank, data processor or equivalent along with seven plus years’ experience and demonstrated competence on GL and back-office processes of financial institutions.

The above is intended to describe the general content of and requirements for the performance of this job. It is not to be construed as an exhaustive statement of duties, responsibilities or physical requirements. Nothing in this job description restricts management’s right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employee signature below constitutes employee's understanding and agreement of the requirements, essential functions and duties of the position.

Employee

Date

Manager

Date