



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. Performs all duties regarding product success, including but not limited to; level 2 support, marketing and product sales support, core conversions & product installations, documentation, training, proactive product communications, quality assurance, product maintenance, compliance, market research, business analysis, defect and feature prioritization and participation in the software development lifecycle of the product. This individual interfaces well with 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 - Develop and manage products with the responsibility for inception (front-end) and delivery (back-end) of product within the SDLC of VISIFI or Third Party; including documentation of business requirements and product user documentation.

- 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; obtains estimates for documentation and tracking purposes; updates statuses in project tracking database.
- Documents business requirements producing thorough, detailed and accurate specifications with examples; gathers requirements; analyzes requirements to determine the compatibility of the business needs and existing product functionality; identifies gaps.
- Prioritizes enhancements for consideration through SDLC processes; coordinates the product development cycle which shall include defining feature sets and marketing overview for new products and enhancements, while soliciting input from the Strategic Product Evolutions Committee, Product Advisory Team, customers, market place and internal staff. Acts as the liaison with business partners.
- Ensures compliance, monitors the federal government's rules & regulations for changes affecting the product.
- Develops in-depth knowledge of competitive products and maintains technical analysis of competitive strengths and weaknesses; evaluates 3rd party technologies and solutions for fit with VISIFI products; acts as end-user advocate; provides concept and approval of design for products.
- Pursues and develops a solid grasp of the design and functionality of VISIFI's products and architecture in order to further expertise.
- 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.
- Communicates effectively across the organization and client base at all levels with proactive communications; ensures that all affected stakeholders and project management have a complete understanding of the implications of any system changes/new features.
- On-site product support with clients to ensure products are being fully utilized, recommends improvements to systems and procedures.



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Software Core Conversions and Product Installations - Participates in all activities associated with the implementation of new core or ancillary software installations and assigned projects of varying sizes.

- Coordinates installation/conversion/de-conversion activities as defined by the Conversion and Installation Technical Coordinator and develops conversion specifications, installs third party products and completes special projects as needed.
- Ensures on-time, on-budget, and in-spec delivery of the projects.
- Provides quality assurance for conversion data; including testing integrations, setting up procedures, writing documentation 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 for the installation. Helps facilitate communications between the Customer and 3rd Party vendor.
- Ensures EOM/EOQ/EOY Standard Testing (dividends, statements, EOY releases, tax remittance readiness).
- Afterhours phone support and travel as assigned.
- Other duties as assigned by manager.

Quality Assurance and Testing - Performs standard testing processes on a variety of software and/or peripherals; analyzes results; maintains familiarity with standard concepts, practices and procedures.

- Designs test plans, scenarios, scripts and/or procedures, tests system modifications to prepare for implementation.
- Addresses software quality assurance for database impacts, user & system scenarios, functional testing, error or bug retests, or usability.
- 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.
- Participates in product design reviews to provide input on functional requirements, product designs, schedules or potential problems.
- Other duties as assigned by manager.

Training & Documentation - Responsible for the design, development, evaluation, and implementation of documentation for training programs to meet the needs of employees and customers. This individual serves to “train-the-trainer” and serves as a training back-up.

- Analyzes training needs of employees and customers through workplace surveys, focus groups, competency assessment and other data collection methods.
- Develops course content, instructional materials, training tools, visual aids, and multimedia presentations, and prepares written and online training documentation.
- Reviews software documentation to ensure technical accuracy, compliance or completeness.
- “Train-the-Trainer” in which the Product Specialist delivers specialized training and educational development to the VISIFI corporate trainer to effectively train customers and employees; serves as a training back-up when required.

2nd Tier Product Support - Serves as the 2nd tier escalation point on complex issues. This position provides assistance to Level 1 on research and resolution of cases.

- Assists with research and resolution of complex and escalated cases that may require extended research; if required, opens technical, DBA, defect and feature requests. Ensures JIRA ticket is clear, concise and contains all needed supporting documentation; assists in training Client Support Representative, or customers as needed



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- Performs billable customer work and other projects as designated; coordinates and completes data repair as needed to resolve issues.
- Coordinates and assists in testing of releases for all product offerings as needed (including after-hours).
- Afterhours phone support as assigned.
- Performs other duties as assigned by manager.

TECHNOLOGY USED:

Salesforce

JIRA

Microsoft Outlook

Microsoft Office Suite, including 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.

COMPETENCIES:

- **Communication** – Excellent communication
- **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.



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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 having taken a product line or products from concept to successful market introduction and market financial success.

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