



Product Specialist II - Member and Branch Services

JOB SUMMARY/OBJECTIVES:

The **Product Specialist II** is responsible for contributing to all key aspects and products lifecycle stages of Member and Branch Services, including Product evolution and marketing inputs in alignment with strategic direction defined by the Executive Team. The Product Specialist stays abreast of trends in the marketplace to ensure the Product's competitiveness; ensures continuous product quality improvement; writes accurate business requirements; ensures precision and timeliness in deliverables; provides marketing and Product sales support; continuously updates Product-related documentation; provides Product-related demos and training; contributes to product quality assurance and compliance; creates Jira tickets for features and defects; collaborates to feature prioritization; and participates in all activities concerning Product project planning and management, and Product software development lifecycle.

This individual interfaces well with customers, senior leaders, customer support, project managers, technical leads, engineers and other personnel to support Product's implementation and evolution and ensure success with our current and prospective customers and partners. This position reports directly to the head of the Core Products Department.

ESSENTIAL FUNCTIONS:

- Contributes to all key aspects and Product lifecycle stages of Member and Branch Services, including products evolution and marketing inputs in alignment with strategic direction defined by the Executive Team
- Stays abreast of trends in the marketplace.
- Ensures the Product's competitiveness and a continuous quality improvement.
- Writes accurate business requirements; ensures precision and timeliness in deliverables.
- Provides marketing and Product sales support, continuously updates Product-related documentation; provides Product-related demos and training.
- Contributes to the Product quality assurance and compliance; creates Jira tickets for features and defects; collaborates to feature prioritization; and participates in all activities concerning Product project planning and management, and Product software development lifecycle.
- Interfaces well with customers, senior leaders, customer support, project managers, technical leads, engineers and other personnel to support Product's implementation and evolution and ensure success with our current and prospective customers and partners.



- Participates, as needed, in customer and sales prospect meetings, Client Conference or other meetings.
- Afterhours phone support as needed in collaboration with Crisis Management.
- Provides On-Site Product support and participation in on-site audit visits as required.
- Support the head for Core Products Department with Core Area Personnel HR related matters.
- Performs other duties as assigned by manager.
- This position reports directly to the head of the Core Products Department.

Experience in Member Services and Branch Operations* such as:

- Daily Teller Operations
- Member Onboarding and Accounts maintenance
- New Share/Draft/Club/CD ... open and maintenance
- OFAC/FinCEN processes
- Checks management
- Statement & Notices process
- ACH and Wire management both incoming and outgoing.
- Branch reporting

* Experience acquired within a Credit Union is preferred.

TECHNOLOGY USED:

Salesforce

JIRA

Microsoft Office Suite, including Outlook, Teams and Excel

VISIFI applications as required

KNOWLEDGE, ABILITY AND SKILLS:

- Ample knowledge of core banking systems and business applications, with in-depth experience in the Member Service and Branch Operations area. This means covering the whole Members onboarding and accounts maintenance process, following the whole life cycle. This knowledge can be acquired whether in a Financial Institution in a position like Branch Manager or in a software company specialized in products supporting the Member Services and Branch Operations Area acting as a Product Owner. Be familiar with the most common products and vendors used by Financial Institutions to support these processes will be preferential.
- 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.

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 Products; 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 a hybrid office/remote 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 products and 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