



Product Specialist I – Installations and Conversions (Member and Branch Services)

JOB SUMMARY/OBJECTIVES:

This **Product Specialist I** is responsible for installing solutions both as standalone activities and as part of customer onboarding/conversion processes; for providing SME to customers and co-workers; for providing product training to customers, partners and co-workers; and for creating and maintaining internal and customer-facing product documentation such as Installation, User and Configuration Manuals. The Product Specialist contributes to key aspects of product and development lifecycle stages within an Agile Business Model and a Program Management and Governance environment as directed.

The Product Specialist communicates with customers in order to collect all the preliminary information needed to deliver accurate product configuration and installation; communicates and interacts with Third parties / Vendors that may be involved with the installation process; provides Product Tier 2 customer support to customers, and assistance to customers during the installation or conversion activities; ensures precision and timeliness in assignments and deliverables; contributes to product quality assurance and compliance aspects as related to installations of products or conversions. For conversions, the Product Specialist performs the processes of balancing and presentation of the converted data to the customer; creates Jira tickets for product features and defects; and participates in all activities concerning Installation or Conversion project planning and management.

This individual thoroughly follows company processes and management directions and successfully collaborates with customers and co-workers to deliver greater value; consistently strives for excellence, fully abides by all company values, and communicates and interfaces well with customers, partners, senior leaders, customer support, project managers, technical leads, engineers and other personnel to support Product's implementation and the correct and effective usage of our solutions by customers; and to ensure accurate, effective, efficient project execution and timely delivery to full customer and management satisfaction. This position reports directly to the head of the Installations Division or the head of the Customer Excellence Group.

ESSENTIAL FUNCTIONS:

- Consistently strives for excellence, fully abides by all company values
- Ensures accurate, effective, efficient project execution and timely delivery to full customer and management satisfaction
- Thoroughly follows company processes and management directions and successfully collaborates with customers and co-workers to deliver greater value
- Installs solutions both as standalone activities and as part of customer onboarding/conversion processes

- Communicates with customers in order to collect all the preliminary information needed to deliver accurate product configuration and installation
- Communicates and interacts with Third parties / Vendors that may be involved with the installation process
- Provides Product Tier 2 customer support to customers
- Provides SME to customers and co-workers
- Provides product training to customers, partners and co-workers
- Creates and maintains internal and customer-facing product documentation
- Contributes to all key aspects of product and development lifecycle stages within an Agile Business Model and a Program Management and Governance environment as directed
- For conversions, performs the processes of balancing and presentation of the converted data to the customer
- Contributes to product evolutions as requested
- Ensures continuous product quality improvement
- Writes accurate business requirements, Jira stories, and Jira tickets for features and defects
- Ensures precision and timeliness in assignments and deliverables
- Contributes to product quality assurance and compliance
- Participates in activities concerning project planning and management regarding Product installations or conversions
- Communicates and interfaces well with customers, partners, senior leaders, customer support, project managers, technical leads, engineers and other personnel to support Product's implementation and evolution
- Participates, as requested, in customer and sales prospect meetings and in other customer-facing meeting as directed
- Participates in afterhours triage/phone support as needed, in collaboration with Crisis Management and per company's policies
- Provides onsite Product support, and participates in onsite conversions and audit visits as required
- Performs other duties as assigned by managers

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

TECHNOLOGY USED:

Salesforce

JIRA

SharePoint

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 three years’ experience in the financial industry with a credit union, bank, data processor or equivalent, along with at least three 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