

## **CU\*SOUTH Financial Software Specialist**

CU\*SOUTH provides financial software and services to credit unions. As economic co-operatives owned by customer-members, credit unions provide a full range of financial products and services including savings and checking accounts, loans, mortgages, debit and credit cards, home banking and investment services. As non-profits, 100% of credit union earnings are retained by their members in the form of higher interest rates, lower fees, decreased interest rates and other dividends.

CU\*SOUTH employees make up a dedicated team of professionals who not only grow long-term partnerships with clients, but also have a vested interest in the community good provided by credit unions. The Financial Software Specialist will train clients on software applications, provide ongoing technical assistance and help integrate program features. The Financial Software Specialist will also deliver and support key business functions such as tellering and member services, lending, accounting, marketing, regulatory compliance and management.

CU\*SOUTH is looking for qualified applicants who desire challenging, creative work, a supportive environment with open-ended opportunities and the satisfaction of helping people improve their financial well-being. *This position is the first step towards a career path at CU\*SOUTH.*

### **Key Responsibilities:**

1. Respond to clients' support call questions by locating previously resolved issues in CU\*SOUTH's online knowledge base and documenting subsequent responses in the tracking system.
2. In cases where the answer to a question or a request is not documented, collaborate with national network analysts and managers to determine the solution, document it and follow through to resolution and client satisfaction.
3. Make client training presentations using a combination of on-site classroom instruction and online webinar presentations. Identify additional training opportunities based on support calls.
4. Make recommendations to management regarding potential improvements to policies and procedures which enhance operations and customer service.

### **Knowledge and Skills Requirements:**

#### **A. Critical Personal Skills:**

1. Strong interpersonal communications, including listening comprehension; the ability to understand problems and answer questions clearly; concise, correct writing and grammar skills; and willingness to collaborate within the support network, including other team members, national analysts and credit union management.
2. Adept analytical skills, including the ability to learn new software programs, understand business processes and integrate personal software knowledge.
3. Proven problem-solving skills, including the ability to think "outside the box."
4. The desire to take initiative and responsibility, manage issues and execute solutions.
5. A drive for continuous personal and professional growth, including the aspiration to develop new programs.
6. Strong organizational and time-management skills, as well as the ability to work independently or with a team.

#### **B. Technical Skills:**

1. Training and experience in credit unions or financial services environment, including prior work as a teller, MSR/CSR, loan officer, collector, bookkeeper or manager.
2. Training and experience in a customer service environment, including proper telephone support, on-site support and Help Desk software use.
3. Training, experience and certification in industry-standard PC software, including Windows XP Windows 7 and Windows 8, as well as MS Office Word, Excel and Outlook.

4. Training and experience in CU\*BASE financial software.

**C. Qualifications:**

1. Bachelor Degree preferred, ideally in Business Management or IT.
2. Work experience preferred in one or more of the following areas: IT Help Desk support, credit union/other financial services and/or IT hardware/software development and support.
3. Experience with CU\*BASE software or similar financial software such as Symitar or Fiserv.
4. Supervisory, coaching and project management skills.
5. Excellent customer service skills in negotiation, mediation and conflict management.

**Key Benefits:**

- Health Insurance (Blue Cross Blue Shield) – 100% coverage for employees
- 10 paid holidays each year
- An additional 10 to 20 Paid-Time-Off (PTO) days earned for each year worked
- Continuing education scholarships

*CU\*SOUTH is an Equal Opportunity Employer. Please email your cover letter, resume and references by August 16, 2013 to [jobs.cusouth@gmail.com](mailto:jobs.cusouth@gmail.com). No phone inquiries, please.*