



## COMMUNITY FIRST FUND TEAM MEMBER PROFILE CHARACTERISTICS, SKILLS & EXPERIENCE

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Date: 09/2021

Name: Vacant

Position/Title: Business Intelligence Manager

Department: Finance

Reports To: Director, Information Technology

Salary Band: TBD

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### CHARACTERISTICS

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- Organized/ Efficient
- Approachable
- Analytical
- Independent/ Self-motivated
- Adaptable and Strategic Leader
- Ethical
- Goal Oriented
- Demonstrated initiative
- Strategic thinker
- Leader
- Communicative
- Helpful
- Performs well in a fast-paced work environment
- Supportive
- Curious
- Creative
- Emotional intelligence

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### SKILLS

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- Proficiency in Microsoft Products; with strong skills in Excel.
- Capacity to learn departmental software systems and databases, including but not limited to Customer Relationship Management software, SPARK, The Exceptional Assistant (TEA) and cloud-based programs like Microsoft 365 and Power BI.
- The ability to maintain a high degree of accuracy and attention to detail.
- Ability to work independently.
- Strong written and verbal communication skills.
- Strong analytical skills.
- Ability to work effectively with racially and socially diverse individuals.
- Knowledge of software applications, databases and the integration between applications.
- Ability to utilize data to make decisions and recommend IT strategy for the organization.
- Technical and problem solving capacity.
- Meeting facilitation.
- Manual development
- Adult learning
- Customer Service
- Committed to working within a team environment to plan for and support the technical needs of the organization.



## **EXPERIENCE**

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- Bachelor's degree in Information Technology or equivalent professional experience.
- Minimum 3-5 years of experience gathering, defining, and communicating business requirements with application solutions.
- Develop training and training guides for adult learners
- Writing technical policy and procedure
- Sound working knowledge of IT operations, systems, and developments
- Microsoft certification preferred.

## **ROLE:**

The Business Intelligence Manager is responsible for performing system analyses on software programs, applications, and web services. Determining system efficiency and optimizing functionality by liaising with internal departments and end-users to support the enhancement of our customer service experience. Provide training and support to end users including on-boarding of new users. Reporting to Management and obtaining approval for system development projects and leading those projects through implementation, training, process documentation, and system improvement.

## **RESPONSIBILITIES:**

1. Application Process Management
2. Vendor Management
3. Project Management
4. Staff Training
5. Individual, Team and Company Participation

## **EXPECTATIONS:**

1. **Application Process Management**
  - a. Provide day to day oversight of key applications like SPARK, TEA, Dynamics 365 - CRM, Power BI, Credit Union Applications, MS Office
  - b. Act as the link between the business stakeholders, key users, and the application providers
  - c. Evaluate current business processes for potential areas of improvement and how it impact our customer service
  - d. Oversee Power BI report creation process-sketching, data modeling, report building, governance
  - e. Gather and analyze requirements, develop improvement strategies, implement solutions, ongoing reviews
  - f. Remain current on latest upgrades and process improvements of applications
  - g. Schedule and facilitate meetings, make presentations, share ideas and findings
  - h. Ensure that solutions meet business needs and requirements
  - i. Conduct and lead UAT (user acceptance testing)
  - j. Update and maintain system documentation
  - k. Identify and examine current business processes, inputs, output, participants, methods to find potential improvement areas.



**2. Vendor Management**

- a. Manage relationship on behalf of our organization with vendors supporting our applications
- b. Request and evaluate quotes, contribute to solution purchasing decisions including selection of suppliers
- c. Consistently search for increase delivery of services and solutions while keeping cost efficiencies in mind
- d. Oversee provider service plans or contracts related to TEA, SPARK, CRM, Power BI-planning, scheduling, and execution

**3. Project Management**

- a. Develop project plans, manage projects, monitor performance and deliverables to ensure timely project completion
- b. Report progress to management
- c. Ensure the project team is on task and meeting expectations of the project lifecycle requirements
- d. Schedule and facilitate project meetings

**4. Staff Training**

- a. Conduct training to employees for applicable corporate and Microsoft applications
- b. Provide on-boarding to new employees in the effective use of corporate and Microsoft applications
- c. Measure effectiveness of training to staff
- d. Create and update training materials when needed
- e. Utilize available/existing training resources when appropriate
- f. Gauge training requirements through surveys and personal assessments

**5. Individual, Team & Company Participation**

- a. Quarterly Coaching Sessions and Annual Review Meeting
- b. Department Meetings
- c. Opportunities Meeting, Quarterly Business Meeting
- d. Participate in training, assessments, and surveys as directed
- e. Special Events Attendance & Support
- f. Meeting support as directed

**Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is frequently required to stand, sit, talk and hear.



- The employee is occasionally required to move about the office; use hands and fingers to feel, handle, or operate office equipment.
- Specific vision abilities required by this job include close vision and the ability to adjust focus.
- Ability to lift up to 50 pounds.
- Occasional bending, kneeling, and lifting.

### **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- The work is performed primarily in an office or client business setting. The noise level in the work environment is moderate.
- Travel in a wide geographic area is required approximately 60% of the time. Employee must hold a driver's license and able to drive, and able to travel outside of the office for meetings, conferences, client visits and other job-related commitments.

*The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position. The team member profile does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.*