

REPORTING & ANALYTICS SPECIALIST

Job Description



DEPARTMENT: Operations

REPORTS TO: Vice President, Operations

POSITION SUMMARY

Provides analytical support and report writing to any or all departments of bank by mining data, conducting analysis, and interpreting results related to the organizational needs. Proactively identifies issues or needed changes, recommends resolution, and participates in quality improvement efforts. Is extremely detailed oriented in operational duties and quality control review. Responsible for performing all Loan Operations tasks. Assists with navigational questions and problems with bank applications. Performs customer account maintenance as appropriate. Provides prompt, courteous and excellent service to internal and external customers at all times. Required to actively cooperate and interact with other departments to advance the overall interests of the bank. Maintains educational and professional expertise through attendance at job related seminars, trainings, conferences and workshops. Assists other operational support areas in the completion of their duties in times of unusual activity or as directed by management. Contributes to the effort of the Bank by performing other duties as assigned.

ESSENTIAL DUTIES & RESPONSIBILITIES

Report Writing:

- Manages report writing functions.
- Assists with the implementation of systems and processes that provide the bank with timely access to key measurements and reports.
- Provides new metrics and analytics as required by Management
- Performs technical review, quality control, testing, and verification on all existing reports provided to Senior Management, Board of Directors, Auditors, and Examiners.
- Uses analysis and great attention to detail to determine potential issues with system data and develops recommendation for solutions.
- Effectively communicates and interprets data as needed.

Operations:

- Researches essential decisions and makes needed recommendations to Core system parameters.
- Researches all internal and external customers account history and amortization inquiries.
- Supports department conversion initiatives and new product launches.
- Assists with maintenance and updates on all Fiserv modules.
- Maintains standard operations procedural documentation.
- Resolves any loan or deposit related exceptions or corrections.
- Assists with data base corrections and changes as needed.
- Boards loans and completes quality control to core system.
- Services loan payments with participation banks.
- Assists Escrow processing and review as needed.
- Answers any customer calls and maintains high level of customer service.

- Performs quality control.
- Performs all loan tasks as assigned, including but not limited to: loan payoffs, loan denials, credit bureau tasks, subordinations, modifications, tickler updates, monthly insurance reconciliations, flood related tasks, and collateral vault maintenance.
- Processes Indirect Loans.
- Files and scans documentation as needed.
- Performs routine checks on IRS tax identification verification.
- Completes year-end processing procedures and answers 1099 or 1098 reporting questions.
- Completes wire processing.
- Performs Online Banking, Card Services, and Deposit Operations functions as needed.

OTHER FUNCTIONS

- Continual communication with VP Operations regarding issues, progress, and ideas for improvements.
- Maintains compliance with all banking laws, acts, regulations and bank policies and procedures.
- Any other duties and/or projects as assigned by management.

REQUIREMENTS & QUALIFICATIONS

- Education/Specialized License(s): Bachelors Degree in Finance or Accounting preferred.
- Experience: 3-5 years bank operations or accounting/finance experience. Data mining and reporting experience preferred.
- Specific Skills: Detail oriented; strong organizational, analytical, and critical thinking skills with the ability to manage and prioritize multiple responsibilities, deadlines and changing priorities. Must have the ability to apply critical thinking and logical reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems. Demonstrates ability to learn and use new software and programs. Proficient computer skills including Microsoft Excel, Microsoft Access, and Microsoft Word proficiency; above average communication skills.
- Supervisory Responsibility: None.
- Working Conditions: Monday-Friday 8:00am to 5:00pm including some Saturday's with additional hours required as necessary or assigned.

Employee Name (Print):

Employee Signature:

Date: