

Job Description – Connect Financial Software Solutions

Title: Technical Support Analyst (Software)

Reports to: Director of Support

Based at: Company Headquarters, Sandy, UT or Remote

Reviewed: 2024-06-24

I. INTRODUCTION

Connect Financial Software Solutions specializes in building, deploying and supporting information technology solutions for the credit union industry.

The Technical Support Analyst (Software) has the following role:

Triages issues that are submitted via the phone and/or ticketing system.

- Resolves the issue(s), ideally without escalation.
- Escalates if / when appropriate.
- Follows up on outstanding issues to help ensure a timely resolution.
- Is able to work a variety of shifts on a rota basis, possibly including overnight, weekends, and federal holidays.

Additional tasks could be added based on company needs.

II. MAJOR DUTIES

Key responsibilities and accountabilities:

- Provides frontline support to the Company's clients.
- Triages/Resolves new tickets and if needed escalates to the appropriate resource(s).
- Keeps Company management and project management team members informed of critical issues so they can be addressed immediately.
- Monitors critical processes to ensure they complete timely and as expected.
- Monitors system events and engages resources appropriately.
- Identifies trends and provides solutions to mitigate/eliminate issues recurring.
- Respects the sensitive nature of customer data and requests; keeps client data secure and private in line with Company / Industry standards.
- Follows policy, process and procedure regarding handling and access of environments containing client data.

III. REQUIRED COMPETENCIES AND RESPONSIBILITIES

Technical Expertise

- Understands multi-tier web-based software solutions and the trade-offs associated with developing to this technology set.

- Able to prioritize multiple requests according to both urgency and importance.
- Strong written and verbal communication.
- Able to query and interact with Microsoft SQL Server databases.
- Able to configure, review, and test software for desired functional results.
- Understands components of computer networks, VPNs, and Certificates.

Communication

- Provides regular status updates to customers.
- Resolves and/or escalates issues in a timely fashion.
- Understands how to communicate difficult and/or sensitive information tactfully.
- Participates in the documentation process and contributes to shared knowledge resources.

Teamwork

- Acknowledges and appreciates each team member's contributions.
- Keeps track of lessons learned and shares those lessons with team members.
- Learns from own and others experience to ensure mistakes are not repeated.
- Right first time approach.

Client Management

- Develops lasting relationships with client personnel that foster client ties.
- Communicates effectively with clients to identify needs and evaluate possible solutions.
- Continually seeks opportunities to increase customer satisfaction and deepen client relationships.
- Able to understand and effectively communicate client opinions whilst representing the Company in a professional manner.

Staff Development

- Organized, detail oriented, self-starter, goal-oriented.
- Ability to work independently as well as in a team – works well and maintains a solid working relationship with developers, business analysts, testers, IT and project managers.

Internal Operations

- Suggests areas for improvement in internal processes along with possible solutions.
- Complies with and helps to enforce standard policies and procedures.