

Strategic Payments Consultant – West Coast (Remote, Full-Time)

The West Coast Strategic Payments Consultant is responsible for the management and successful completion of projects with Credit Union clients leading the relationship and guiding the process with the support of a Business Analyst and Pricing Analyst. This position oversees all aspects of client facing projects from requirements gathering through vendor evaluations, reference visits, negotiations and final vendor selection. High level responsibilities include needs analysis based guidance, setting/managing deadlines, maintaining project schedule, assigning responsibilities, managing risk, monitoring status and reporting on progress of project. Areas of concentration include: Credit/Debit/ATM Processing, Visa/MasterCard Brand, PIN/EFT Network, Online Banking, Bill Pay, Mobile Banking, as well as a growing menu of related services.

The ideal candidate would be someone who would bring a book of business (Credit Union clients) to CU Engage with the opportunity to generate revenue through CU Engage Services. This person would leverage their relationships with Credit Unions to introduce CU Engage in order to generate business and would represent CU Engage in West Coast events/activities etc to increase our exposure. Any relationships generated by this position resulting in revenue is eligible for the CU Engage commission plan.

Responsibilities Include:

- Coordinate internal resources and third parties/vendors for the flawless execution of projects
- Ensure resource availability and allocation
- Manage to a detailed project plan to monitor and track progress
- Report and escalate to management as needed
- Successfully manage the relationship with the client's core evaluation team and all internal stakeholders
- Perform risk management to minimize project
- Contribute to revisions and new project templates and process documentation
- Collaborate with Executive Sponsor and support team as required
- Provide facilitation during all client meetings
- Travel 50% or more nationwide
- Work with CU Engage team to maintain and refine existing Project Management tools and documentation and build new as needed

Experience:

- 10 or more years' experience in the credit union industry and/or payments industry, with preference given to credit/debit card processing, electronic banking, bill pay and/or mobile banking.
- Knowledge of Credit Card Processing, Debit Card Processing and Online Banking, vendors, tools and processes
- Experience in successfully completing vendor selection technology projects Involving both product and custom solutions.



- Demonstrate ability to manage external, third party vendors and clients including their employees, consultants and designated subcontractors
- Facilitate creative problem solving sessions with all levels of leadership teams across different line of business disciplines.
- Present complex solutions to senior leadership teams.
- Exposure to contract negotiations and vendor management

Skills/Competencies

- Problem Solving - Identifies and resolves problems in a timely manner. Gathers and analyzes information skillfully. Works well in group problem solving situations. Uses reason even when dealing with emotional topics.
- Collaboration - Effectively builds and maintains partnerships with clients, prospects and people at all levels across the company. Contributes to team and company success. Maintains flexibility and reacts to change appropriately. Communicates and shares information with candor that builds trust and enhances relationships.
- Communication - Creates and sustains ongoing forums that encourage two-way communication opportunities. Demonstrates and promotes positive prospect, client, and work relationships. Proactively addresses and manages conflict and disputes. Works to achieve constructive resolution.
- Planning/Organizing - Prioritizes and plans work activities. Uses time efficiently. Plans for additional resources. Sets goals and objectives. Organizes or schedules other people and their tasks. Develops realistic action plans.
- Quality - Demonstrates accuracy and thoroughness. Looks for ways to improve and promote quality. Applies feedback to improve performance. Monitors own work to ensure quality.
- Technical Skills - Assesses own strengths and weaknesses. Pursues training and development opportunities. Strives to continuously build knowledge and skills. Shares expertise with others.
- Professionalism – Approaches others in a tactful manner. Reacts well under pressure. Treats others with respect and consideration regardless of their status or position. Accepts responsibility for own actions. Follows through on commitments.
- Adaptability – Adapts to changes in the work environments. Manages competing demands. Changes approach or method to the best fit the situation. Able to deal with frequent changes, delays, or unexpected events.
- Time Management - Ability to multi-task and prioritize conflicting tasks and requests.
- Presentation - Confident and compelling presentation skills, with proven ability presenting to senior leadership.
- Negotiation – Ability to broker the negotiation of complex deals to a successful resolution.
- Software Planning and Presentation Tools - Proficient in Microsoft Office and other project mgmt. software experience

Education/Training:

- Bachelor's Degree - Preferably in business or similar field