Digital Project/Vendor Manager

California Coast Credit Union takes pride in promoting financial prosperity to our members while continuously delivering stellar service! We are passionate about cultivating relationships within the educational and business communities and take a very active role in community activities.

We offer beautiful surroundings and foster a positive work/life balance. Cal Coast is in tune to what's important to our valued employees. Our workplace Wellness Program provides opportunities for health, wellness and fun as does our Employee Activity Program. We boast of our employee friendly culture and our positive environment which supports recognition and rewards. Come be a part of our family!

If you share the same interests and passions and possess the right credentials, then read on to find out more:

**JOB OBJECTIVE:**

Under the guidance of the Chief Information Officer, this position’s primary responsibility is to ensure the streamlined operation of the Digital Commerce channel (the external member website, online banking, mobile banking and telephone banking) in accordance with credit union policies, regulations and sound business practices. Manages the day-to-day activities of the online channel. This includes managing member concerns and communications, as well as vendor relations with Digital Commerce service providers. It also includes ownership of system operations, updates and enhancements as well as responsibility for business continuity planning and disaster response. Requires coordinating resources from numerous credit union departments providing Digital Commerce support such as Marketing, Information Technology, Compliance, Risk Management, Support Services, Branch Support and the Member Service Center to achieve these objectives.

**DIMENSIONS:**

**Depth:** This position’s responsibilities are related to member support, technical support resource coordination and vendor relations and support. This position is the main point of contact for changes, enhancements, compliance or resolving any issues with the online channels.

**Digital Systems Supported:** External member website, online banking platform, telephone banking platform, mobile banking platform, check image system, bill payment service, e-statements service, branch/ATM location service, online mortgage and consumer loan origination services, and other third-party service and information systems.

**Members Supported:** Over 295,000 website visitors per month  
Over 47,000 online banking users  
Over 22,000 bill pay users  
Over 21,000 e-statement users  
Over 20,000 telephone banking users

**Staff/Departments Supported:** Marketing, Information Technology, Operations Services, and Member Service Center.
Vendors Managed:  At least eight key vendors who provide systems, services and real-time information to the online platforms, plus ad hoc vendor relationships to provide support, maintenance and programming services to the online platforms.

SUPERVISORY RESPONSIBILITIES:

This position reports directly to the Chief Information Officer. This position has no direct reports, but this position is responsible for outcomes by requesting, utilizing and managing resources from other departments including Information Technology, Marketing, Support Services, Compliance, and the Member Service Center.

NATURE & SCOPE:

- Obtains resources from stakeholder departments, and plans and manages the efforts of these resources to: resolve system and member issues; communicate to members and to staff; implement changes, enhancements and updates; ensure information and transactional accuracy and compliance; and provide a streamlined and consistent user experience with exceptional member service. Provides feedback to stakeholder management regarding borrowed resources for annual performance evaluations.

- Responsible for upholding the online channels service level agreements (SLAs). Ensures that the website, online banking, mobile banking, telephone banking, and their respective online components are operational. Coordinates appropriate resources from stakeholder departments and/or from vendors to resolve issues in a timely manner. Ensures communications with members and staff are made in a timely manner.

- Manages vendor relationships to support online channel services.

- Responds to member complaints and communications. Acts as liaison to support the Member Service Center’s activities related to the e-Digital Commerce channels. Works with Marketing and Community Relations to develop member communications that address member needs and concerns.

- Ensures planning and fulfillment of preventative maintenance activities.

- Ensures that web pages are implemented as required to support the credit union goals and objectives. Ensures existing pages are maintained with current accurate information and incorporates changes to support promotions and special offers. Coordinates with the Marketing and Information Technology departments to ensure optimal member-focused look, feel and functionality.

- Under the direction of the CIO, assists with research, analysis, and recommendations for changes in operational functionality and oversees the implementation of identified enhancements to products, services, procedures, and processes. Manages to established priorities and timelines. Communicates changes to members and staff.

- Reviews and analyzes the credit union’s online channel statistics, reports and trends to make recommendations for changes to processes, products and systems to improve member service.
Reviews and analyzes competitor on-line products and services, reporting trends. Monitors the area Key Performance Metrics (KPMs) to ensure achievement of projected targets. Implements strategy to support achievement of goals.

- Responsible for ensuring that the telephone banking system is operational, and that its functionality and member experience meet established standards.
- Responsible for the Digital Commerce department annual operating plan recommendations. Oversees the department operating plan, ensuring timely completion of identified items. Monitors and ensures results are within approved budget.

- Consults with other credit union departments in planning system resources to meet department and credit union strategic goals.

- Participates in the development of the business continuity and resumption plans and activities for the online systems and channels. Responsible for responding to business continuity situations.

- Actively supports and fosters the credit union’s values, vision, and mission statement.

- Performs other relevant and related duties as required.

EDUCATION, SKILLS, & ABILITIES (qualifications and experience required for this position):

- An undergraduate degree in Business Administration or related discipline plus (5) years progressively more responsible financial or service industry member/customer service experience; or an equivalent combination of education and relevant experience. Three (3) of the five (5) years must have been in a management position, performing the full range of management responsibilities including directing and counseling staff, developing and controlling operating plans, vendor management and project development and implementation. Two (2) of the five years must have included responsibility for online/internet channel development and/or customer service. One additional direct-member delivery channel experience(s) required besides internet channel, such as: traditional branch, call center, collections, card support, etc.

- Demonstrated management and leadership skills and the ability to effectively train, direct, facilitate, and motivate others.

- Demonstrated experience and in-depth knowledge of internet delivery channels, including email, websites, and Digital Commerce. Working knowledge of internet banking, including bill payment and e-statements, preferred.

- Working knowledge of credit unions or financial institutions, including products, services, regulations and delivery channels.

- Ability to handle multiple projects and meet deadlines. Skill and ability in prioritizing and resolving problems independently while multi-tasking.

- Strong organizational, verbal, listening, and written communication skills. Ability to communicate directly with members effectively, exhibiting personalized, caring service.

- Experience with interactive design and user experience design preferred.
• Strong skills with word-processing and spreadsheet software. Experience with web page design tools preferred.

• Must be innovative, creative and flexible.

• Ability to appear for work on time, follow directions from a supervisor, interact effectively with co-workers and members, understand and follow policies and procedures, accept constructive criticism, and the ability to lead and manage others whether or not under direct management supervision.

MAJOR ACCOUNTABILITIES:

• Manages the day-to-day activities of the online channel. This includes managing member concerns and communications, as well as vendor relations with Digital Commerce service providers. It also includes ownership of system operations, updates and enhancements as well as responsibility for business continuity planning and disaster response. Requires coordinating resources from numerous credit union departments providing Digital Commerce support such as Marketing, Information Technology, Compliance, Risk Management, Support Services, Branch Support and the Member Service Center to achieve these objectives.

• Responsible for the Digital Commerce annual operating plan recommendations. Oversees the department operating plan, ensuring timely completion of identified items. Monitors and ensures results are within approved budget.

• Under the direction of the CIO, assists with research, analysis, and recommendations for changes in operational functionality and oversees the implementation of identified enhancements to products, services, procedures, and processes.

• Responds to member complaints and communications. Acts as liaison to support the Member Service Center’s activities related to the e-Digital Commerce channels. Works with Marketing and Community Relations to develop member communications that address member needs and concerns. Handle situations appropriately with member contacts and vendor management.

• Participates in the development of the business continuity and resumption plans and activities for the online systems and channels. Responsible for responding to business continuity situations.

PHYSICAL REQUIREMENTS:

• Excellent ability to communicate, both verbally and in writing; ability to tolerate periods of continuous sitting; ability to operate and utilize a personal computer and peripherals

ENVIRONMENTAL CONDITIONS:

• Work is primarily performed within a cubicle office setting. Subject to conversational noise found in an office environment.

Note: Staff is expected to perform various tasks, projects and administrative duties as assigned. Management reserves the right to assign or change duties and tasks to this position at their discretion.