

## POSITION DESCRIPTION

**JOB TITLE:** Data Analyst **GRADE LEVEL:** IV

**DEPARTMENT:** Marketing **FLSA:** EXEMPT

**DATE:** July 2022

**Reports directly to:** Marketing Manager

**Location:** Chalfont, PA (On-Site)

**Function:** Collaborates with cross-functional business units to provide insight into existing data and new ways to look at and interpret results by providing insightful and forward-looking quantitative and qualitative market analysis to key stakeholders. Through analysis and research, assists with critical business decisions, identifying opportunities, enhancing marketing, and building member value.

### **Duties and Responsibilities:**

1. Must meet our service standards as evaluated by our internal and external members:
  - *I will greet you with a prompt, friendly welcome*
  - *I will treat you with courtesy and respect*
  - *I will offer you my undivided attention*
  - *I will take ownership of situations and follow through*
  - *I will provide accurate information and helpful solutions*
  - *I will do all I can to improve your financial life*
  - *I will thank you for your business*
2. Responsible for the MCIF (Marketing Customer Information File) and Predictive Analytic software system to better target Credit Union's promotions, track results, cross-sell products, determine member profitability, and provide Senior Management reporting.
3. Acts as point of contact for database analysis, development projects, and tasks.
4. Analyze tables in Credit Union and external vendor's databases to establish knowledge of data for accurate retrieval and use in report writing. Assists with coordinating and linking internal and external databases into the Credit Union data warehouse environment.
5. Utilize available tools such as SQL Server Report Builder, SQL Server Management Studio, MS Access, Excel, Power BI, Tableau to provide technical reports for the various business units with the Credit Union and external vendors. Creates data extracts across multiple channels, including core system, lending software/systems, marketing tools, and Call Center applications.
6. Creates and manages marketing lists for all marketing activities, including working with internal departments to build out criteria for targeted marketing campaigns.

7. Independently prepares recurring or ad hoc analytics/reports for all business units supporting management decision making.
8. Determine the meaning of data and explain how various teams and leaders can leverage it to improve and streamline processes.
9. Performs other duties as assigned.

### **Position Specifications**

**Education:** Bachelor of Science Degree in mathematics, data science, computer science, information management, or statistics or closely related field.

**Experience:** A minimum of two years of experience working as a data analyst or data mining experience, ideally in the financial services industry.  
Knowledge of statistics and experience using statistical packages for analyzing large datasets.  
Strong Analytical skills with the ability to accurately collect, organize, analyze, and disseminate significant amounts of information.  
Adept at presenting findings in a compelling non-technical manner.

**Skills:** Excellent interpersonal and communication skills (written and verbal) required. Must be highly organized, detail oriented, and have strong PC skills.

**Software:** Enterprise Level Business Intelligence reporting tools (e.g. Tableau, Power BI) and SQL (Structured Query Language).