

Ideal Credit Union
Structured Compensation - Job Description
Business Intelligence Solutions Specialist

Data Year: 2026

Prepared On: 09/17/2026

Department:	None	Grade:	12
Reports To:	AVP of Business Intelligence and Reporting	Classification:	Non-Exempt
Supervises Direct:	0	Supervises Indirect:	0
Approved By:	CGO	Effective Date:	08/18/2026
		Revised Date:	09/17/2026

Role:

The Business Intelligence Solutions Specialist partners with business leaders to develop, maintain, and enhance reporting, analytics, automation, and business intelligence solutions that improve organizational performance, operational efficiency, and member experience. This role combines operational reporting and dashboard development with business intelligence consulting, helping translate business objectives into data-driven solutions that support informed decision-making across the credit union.

The ideal candidate combines strong technical expertise with business acumen and experience with Power BI, Snowflake, Power Automate, and emerging technologies such as Microsoft Copilot. This position is responsible for delivering reporting and analytics solutions, advancing automation and self-service capabilities, and identifying opportunities for innovation and continuous improvement.

Essential Functions & Responsibilities:

- E 40% Reporting & Dashboard Development
 - Develop, maintain, and enhance recurring operational, financial, regulatory, and management reports.
 - Design, develop, and maintain Power BI dashboards and reporting solutions.
 - Validate report accuracy and troubleshoot reporting discrepancies.
 - Support business users with report requests, dashboard enhancements, and reporting questions.
 - Maintain documentation for reports, dashboards, data sources, and reporting processes.
- E 25% Business Intelligence Consulting & Analytics
 - Lead discovery, requirements gathering, and business consultation sessions to identify opportunities for data-driven decision making, operational improvement, and strategic performance measurement.
 - Serve as a trusted advisor to leadership and business units on reporting, analytics, and performance measurement strategies.
 - Facilitate stakeholder discussions to define business requirements and translate them into scalable BI solutions.
 - Partner with leadership to design and enhance executive, operational, and strategic reporting frameworks and performance measurement solutions.
 - Translate and present analytical findings, recommendations, and business intelligence solutions to leadership teams and stakeholders in a clear and actionable manner.
- E 15% Automation & Process Improvement
 - Lead the identification, prioritization, design, and implementation of automation opportunities utilizing Power Platform technologies to improve efficiency, reduce manual effort, and enhance

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business processes.

- Develop, maintain, and enhance reporting-related automation workflows using Microsoft Power Automate and related technologies.
- Collaborate with business units to evaluate existing processes and identify opportunities for process improvement through automation and data-driven solutions.
- Partner with Information Technology and business stakeholders to implement scalable automation and reporting solutions.
- Monitor automation performance, troubleshoot issues, and recommend enhancements that improve reliability, efficiency, and user experience.
- Collaborate with Information Technology and business teams to implement scalable data and reporting solutions.

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| E 10% | <p>Data Governance & Self-Service Analytics</p> <ul style="list-style-type: none">• Promote data governance best practices and establish standards for reporting, dashboards, and KPI definitions.• Lead the development of self-service reporting capabilities that empower business users while maintaining data integrity.• Lead efforts to promote data quality, governance standards, and consistent KPI definitions across business intelligence solutions. |
| E 5% | <p>AI & Innovation</p> <ul style="list-style-type: none">• Identify, evaluate, and promote business use cases for Microsoft Copilot and other AI-enabled technologies.• Partner with departments to implement responsible AI solutions that improve productivity, reporting, and decision-making.• Stay informed on emerging analytics, automation, and AI trends and recommend solutions that drive organizational value. |
| N 5% | <p>Performs other related projects/duties as assigned.</p> |

Performance Measurements:

1. Successfully deliver and complete business intelligence solutions, dashboards, analytics projects, automation initiatives, and strategic priorities within established timelines while proactively communicating project status, risks, and opportunities.
2. Identify and implement opportunities that improve organizational efficiency, enhance access to meaningful data, and reduce manual processes through analytics and automation.
3. Develop and maintain business intelligence solutions that promote data accuracy, consistency, integrity, and effective decision-making.
4. Develop and maintain documentation, standards, and knowledge resources for business intelligence solutions, KPIs, data models, and analytical processes.
5. Build effective partnerships with business units and provide professional, responsive, and solution-oriented support to stakeholders.

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6. Establish and enhance KPI frameworks, executive dashboards, and performance measurement solutions that support organizational goals.
7. Identify and promote opportunities for automation, AI adoption, and process improvement that provide measurable business value.
8. Lead the development of self-service reporting capabilities and governance standards that improve data accessibility while maintaining data integrity.
9. Translate complex analytical findings into clear, actionable recommendations that support leadership decision-making.
10. Ensure recurring reports, dashboards, and business intelligence solutions remain accurate, reliable, and aligned with evolving business requirements.
11. Maintain current knowledge of emerging analytics, automation, AI, and Microsoft technologies and apply relevant innovations where appropriate.
12. Comply with Bank Secrecy, AML, and all required compliance training and regulatory requirements.
13. To provide friendly, professional and accurate service and support to all members and associates.

Knowledge and Skills:

Experience	Three years to five years of similar or related experience in business intelligence, reporting, analytics, or data solutions.
Education	(1) A bachelor's degree in Data Analytics, Information Systems, Statistics, Computer Science, Business, or a related field; or (2) an equivalent combination of education, certifications, and relevant experience.
Interpersonal Skills	Work involves extensive personal contact with others and is of a personal or sensitive nature. Motivating, influencing, and/or training others is key at this level. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary and often requires the ability to influence and/or sell ideas or services to others.
Other Skills	• Experience developing business intelligence solutions using Power BI, including executive dashboards, data modeling, data visualization best practices, and DAX. • Strong SQL skills and experience working with Snowflake or comparable cloud data platforms. • Experience leading or implementing workflow automation solutions using Microsoft Power Automate or similar tools. • Strong analytical, problem-solving, and critical thinking skills. • Ability to communicate technical concepts and data insights to both technical and non-technical audiences. • Experience working with financial, operational, or member data. • Experience facilitating business requirements gathering sessions and translating business challenges into scalable analytics solutions.

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Preferred Skills

- Experience in credit unions, banking, or financial services.
- Experience with Microsoft Fabric, Azure, or other cloud-based analytics platforms.
- Knowledge of data governance and data quality best practices.
- Experience developing and optimizing data models, views, and analytics data structures within Snowflake.
- Familiarity with ETL processes and data integration.
- Experience implementing automation solutions using Microsoft Power Platform technologies.
- Experience identifying, implementing, and leveraging Microsoft Copilot, AI-assisted analytics, or other AI-enabled business solutions.
- Experience developing executive dashboards, KPI frameworks, scorecards, and executive reporting strategies.
- Experience within a regulated financial services environment, including credit unions.
- Experience developing self-service reporting environments and promoting data literacy across business functions.

**Physical
Requirements**

This position may involve standing or walking occasionally, but may also involve sitting for extended periods of time. Typing or otherwise working primarily with fingers rather than with the whole hand or arm is required on a continual basis. Expressing or exchanging ideas by means of the spoken word, ability to receive information through verbal and written communication, and the ability to see with or without corrective lenses are all necessities of this position on a continual basis.

Work Environment

Office environment, may include working extra hours and weekends, overtime, rotating shifts, and may be stressful at times.

Acknowledgment

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

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Printed Employee Name

Date

Employee Signature