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## JOB DESCRIPTION

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**Job Title:** Customer and Operations Analyst

**Grade:** D

**Department:** Operations, CAF Bank

**Main purpose of job:**

This role will be responsible for analysing operational data and customer insights to drive efficiency and improve customer satisfaction.

- Respond to and manage requests for customer insight through a variety of data sources. Proactively sharing key insights to aid the understanding and management of the bank.
- Take ownership of weekly reporting ensuring we have a tight grasp of trends for the week as it unfolds by actively reviewing data, conducting deep dives and staying abreast of major activities across the business.
- Develop and implement a prioritisation framework to deal with different requests from teams that they interact with and collaborating with stakeholders to understand insight needs and translate them into actionable reports.
- Ensure insights are easily accessible and logically organised.
- Identify and address potential issues or bottlenecks in the insight delivery process as early as possible.
- Foster a collaborative and supportive team environment to enhance productivity and morale.
- Continuously seek opportunities to improve insight processes and methodologies to speed up repetitive tasks.

**Responsible to:** Head of Customer Service

**Budgetary responsibilities:** None

**Responsible for:** No direct reports.

**Key Job Responsibilities:**

- **Operational Data Analysis:** Collect, analyse, and interpret operational data to identify trends, inefficiencies, and areas for improvement.
- **Customer Insights:** Analyse customer feedback, complaints, and satisfaction surveys to identify common issues, areas for improvement, and key drivers of customer satisfaction.
- **Process Optimization:** Work with operations teams to identify opportunities for process improvements, streamline workflows, and increase efficiency.

- **Reporting & Dashboards:** Create regular reports and dashboards to track key performance indicators (KPIs), operational metrics, and customer satisfaction.
- **Cross-functional Collaboration:** Collaborate with different departments, including customer service, marketing and product teams, to align operational strategies with customer needs and business goals.
- **Troubleshooting and Problem-Solving:** Investigate operational issues and customer concerns, providing actionable insights and solutions to resolve them effectively.
- **Trend Identification:** Monitor industry trends, competitor performance, and emerging technologies that could enhance customer experience and operational performance.
- **Recommendations & Action Plans:** Develop actionable recommendations for management based on data analysis to improve operations and customer experience.
- **Customer Experience Enhancement:** Continuously monitor customer journey touchpoints to ensure the highest levels of service are provided, proposing enhancements as needed.

### CAF Values and Behavioural Indicators

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.

Date: Jan 2025

## PERSON SPECIFICATION

**Job title:** Customer and Operations Analyst

**Date:** Jan 25

Attributes	Essential ✓	Desirable ✓	How Evidenced <sup>†</sup>
<b>Experience</b> Extensive experience working in analytics Experience in effectively conveying complex information to diverse audiences Ability to work collaboratively with various stakeholders to build consensus and achieve common goals. Proven track record in improving customer experience Experience in banking industries would be advantageous.	✓ ✓ ✓ ✓ ✓		A, C, T
<b>Qualifications</b> Experienced in the use of reporting software such as PowerBI, Tableau or an equivalent Knowledge of process improvement methodologies (Lean, Six Sigma)		✓ ✓	E
<b>Training</b>			
<b>Specialist Skills/ Ability/Knowledge</b> Project management Ability to write reports for Executive Board, Director and key stakeholders Understanding of customer experience and lifecycle management Previous exposure in Operations Experience with customer feedback forums Extensive knowledge of the latest contact centre and customer service thinking and implementation techniques.	✓ ✓	✓ ✓ ✓	A, C, T
<b>Communication</b> Ability to communicate well to all levels including Executive level and key stakeholders. Excellent verbal or written communication skills. Presentation skills (written & oral) to small & large groups.	✓ ✓ ✓		A, C, T
<b>Personal Qualities</b> Analytical thinker with a passion for problem solving and improving processes Someone who can spot trends quickly and shift focus to the most important insights Customer focused mindset Pro-active and self motivated Strong organisation skills and able to manage multiple projects simultaneously Strong communicator, capable of setting expectations and providing clear updates	✓ ✓ ✓ ✓ ✓ ✓		A, C, T

Able to work collaboratively, in a fast paced environment, managing high demand situations	✓		
<b>Special Conditions</b>			
<b>Prior to Appointment</b> All posts: <ul style="list-style-type: none"> <li>• Credit Check</li> <li>• Sanctions Check</li> <li>• Basic DBS Check</li> <li>• Employment References</li> <li>• Medical Clearance</li> <li>• Right to Work in the UK</li> </ul> FCA Approved Posts: <ul style="list-style-type: none"> <li>• Standard DBS Check</li> </ul>	✓ ✓ ✓ ✓ ✓ ✓  ✓		R/E

✓ Tick either the Essential or Desirable column as appropriate for each attribute

† Insert the code from the key below for how you intend to assess this requirement e.g. at interview, via references etc.

#### **Key**

**R** = References, **E** = Evidence/Certificates, **A** = Application, **C** = Competency Interview, **T** = Testing/Assessment