
JOB DESCRIPTION

Job Title: Reporting & Insights Analyst

Grade: C

Department: Operations

Main purpose of job:

The Reporting & Insights Analyst plays a critical role in supporting data-driven decision-making within the Customer Operations team and wider CAF. This role focuses on delivering actionable insights through robust reporting, helping to optimise customer service performance, operational efficiency, and strategic planning.

Responsible to: Customer Experience Manager

Budgetary responsibilities: None

Responsible for: None

Key Job Responsibilities:

Reporting & Dashboard Management

- Develop and maintain operational dashboards that provide real-time visibility into key performance indicators (KPIs), such as customer satisfaction, response times, and case resolution rates.
- Ensure data integrity and consistency by validating data sources and applying quality control checks across all reporting outputs.
- Automate recurring reports using tools like Power BI, Excel macros, or SQL scripts to reduce manual workload and improve reporting efficiency.
- Tailor reports to audience needs, ensuring that senior leadership, team managers, and frontline staff receive relevant and actionable information.

Data Analysis & Insight Generation

- Conduct deep-dive analyses into customer behaviour, service trends, and operational bottlenecks to uncover root causes and improvement opportunities.
- Use statistical techniques and data visualisation to identify patterns, anomalies, and correlations that inform strategic decisions.
- Translate complex datasets into clear narratives, using storytelling techniques to make insights accessible and compelling for non-technical stakeholders.

- Support forecasting and planning by analysing historical data and identifying trends that impact resource allocation and service delivery

Stakeholder Engagement

- Collaborate with cross-functional teams to gather requirements and align reporting outputs with business goals.
- Act as a trusted advisor to operational leaders, helping them interpret data and make informed decisions based on insights.
- Facilitate workshops or presentations to share findings, gather feedback, and ensure that insights are understood and actionable.
- Maintain strong communication channels to ensure evolving business needs are reflected in reporting and analysis efforts.

Continuous Improvement & Innovation

- Identify inefficiencies in current reporting processes and propose solutions to streamline workflows and enhance data accessibility.
- Stay current with industry best practices in data analytics, visualization, and reporting tools to continuously improve the quality and impact of insights.
- Champion a data-driven culture within Customer Operations by promoting the use of analytics in everyday decision-making.
- Experiment with new tools and techniques, such as predictive analytics or machine learning, to enhance the sophistication of insights over time.

Ad-hoc Support & Project Involvement

- Provide analytical support for strategic initiatives, such as service redesigns, technology implementations, or customer journey mapping.
- Respond to urgent data requests from leadership or project teams with speed and precision, ensuring decisions are backed by accurate information.
- Contribute to business cases and proposals by supplying data-driven evidence and scenario modelling.
- Participate in cross-functional projects, offering insights that help shape project direction and measure success

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: February 2025

PERSON SPECIFICATION

Job title: Reporting & Insights Analyst

Date: May 2025

Attributes	Essential ✓	Desirable ✓	How Evidenced ⁺
Experience Experience in analysing large datasets to identify trends, patterns, and actionable insights. Proven track record of developing detailed and visually appealing reports using tools like Microsoft Excel and Power BI. Experience in building and maintaining self-service dashboards to enable teams to access and interpret data independently.	✓ ✓ ✓		R/A/C
Qualifications Formal qualification in Data Analytics for relevant field		✓	E
Training Advanced training in Excel for data analysis, including pivot tables, complex formulas, and data visualisation techniques. Comprehensive training on Power BI to create interactive reports and dashboards, enabling self-service data access Training in SQL for querying databases, data manipulation, and integration with reporting tools	✓ ✓ ✓		
Specialist Skills/ Ability/Knowledge Proficiency in Microsoft based software SQL Stakeholder Engagement Problem-Solving Presentation Skills Continuous Improvement Adaptability Analytical	✓ ✓ ✓ ✓ ✓ ✓ ✓		A/C/T
Communication Excellent verbal and written communication at all levels Excellent presentation skills to small and larger groups Strong interpersonal skills to build and maintain relationships	✓ ✓ ✓		
Personal Qualities <ul style="list-style-type: none"> Flexible Integrity Trustworthy Pragmatic Passionate about customers Tenacious Self-starting 	✓ ✓ ✓ ✓ ✓ ✓ ✓		C

Special Conditions Working unsociable hours may be required on occasions Travel required to other CAF locations on occasions	✓ ✓		C
Prior to Appointment All posts: <ul style="list-style-type: none"> • Credit Check • Sanctions Check • Basic DBS Check • Employment References • Medical Clearance • Right to Work in the UK FCA Approved Posts: <ul style="list-style-type: none"> • Standard DBS Check 	✓ ✓ ✓ ✓ ✓ ✓ ✓		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