

# JOB DESCRIPTION

## BUSINESS ANALYST

2023



Job title:	Business Analyst
Business area:	Business Support
Reporting to:	Head of Business Support

### Principal accountabilities:

- Defines and documents customer business functions and processes.
- Consults with functional unit management and personnel to identify, define and document business needs and objectives, current operational procedures, problems, input and output requirements, and levels of systems access.
- Acts as a liaison between departments in the analysis, design, configuration, testing and maintenance of processes and systems to ensure optimal operational performance.
- Analyses the feasibility of, and develops requirements for, new systems and enhancements to existing systems; ensures the system design fits the needs of the users.
- Tracks and fully documents changes for functional and business specifications; assists with the writing of detailed universally understood procedures for use in training.
- Identifies opportunities for improving business processes through information systems and/or non-system changes; assists in the preparation of proposals to develop new systems and/or operational changes.
- Plans, organises and conducts business process reengineering/improvement projects.
- Assists in developing an overall change management strategy for the business.
- Conducts change impact analysis to assess the potential implications of change.
- Participates in user acceptance testing and testing of new system functionality.
- Provides technical assistance in training.
- Directs or participates in studies of new and existing systems and special projects to determine feasibility.
- Develops policy and procedures to improve efficiency, cost-effectiveness, and/or improve internal and external customer service.
- Prepares reports and written findings and recommendations; and monitors changes.
- Provides work direction to one or more technical or administrative staff or acts as a lead on designated projects or assignments.
- To fulfil any other reasonable requirement of the department or Curtis Banks
- Proactively identifies risk within the business and escalates concerns to Business Support Manager
- Able to support team members and other colleagues and maintain effective communication flow within the team, with other teams and with other departments.
- Able to actively manage personal workflow to ensure that performance targets and standards are met.
- Keeps up to date with regulatory, key investment and benefits related changes.

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- Ensures that regular tasks are anticipated and processed at the required time.

## Qualifications

- 5 GCSE's (or equivalent) at grades A-C (or equivalent) to include English and Maths

## Knowledge

- Advanced knowledge of MS Office products including Word, Excel and Visio is highly desirable
- Knowledge of VBA and SQL is desirable
- Good technical knowledge of pension administration systems (SIPP, SSAS) and regulatory requirements is desirable.

## Skills and Experience

- A background in financial services and knowledge of the financial services regulatory environment and strong understanding of risks and controls is essential.
- Specific knowledge of the pensions industry is desirable.
- Being able to effectively manage internal and external relations, together with exchanging routine and non-routine information clearly and concisely is essential
- Applicants must possess a high degree of interpersonal skills and be able to prioritise workloads on a daily basis to ensure that projects are delivered successfully to specific deadlines.

## Benefits

- Discretionary Bonus Scheme
- Service Recognition Scheme
- Refer a Friend bonuses
- Ad-hoc Flexi Time
- Agile Working (if the role permits)
- Free Eye Test & £70 towards prescription
- Season Ticket Loan
- Cycle to work scheme
- Free Fruit
- Free Sanitary Products
- EAP services
- Mental Health First Aiders
- Buy/sell of holiday
- Flex bens platform - for reduced gym memberships, Free Mortgage advice, Will Writing, travel insurance, retail discounts (amongst other things)

## Consumer Duty

The FCA requires that “a firm must act to deliver good outcomes for retail customers”. At Curtis Banks we act in good faith and avoid foreseeable harm toward our retail customers. We enable and support our customers to pursue their financial objectives.

We ensure our products and services are fit for purpose. We ensure the price & value is fair. We equip our customers to make effective decisions through our clear communications. We provide a helpful customer service that is responsive and accessible.

You play an important part in helping us deliver good outcomes to our customers by:

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- Ensure that you fully understand what Consumer Duty is and how it applies to your role at Curtis Banks
- Comply with Consumer Duty in all circumstances
- Always act to deliver good outcomes for all of our customers
- Always do your utmost to avoid foreseeable harm and safeguard vulnerable customers
- Demonstrating how you meet good customer outcomes

This is a full time vacancy.

Office hours are: 9.00am - 5.30pm Monday to Thursday & 9.00am - 5.00pm Friday (37 hours)

Duration: Permanent

Location: Bristol

All candidates will be asked to confirm their eligibility to work in the UK at interview stage and to provide evidence of it on appointment. Please note that successful candidates will be subject to a criminal records and personal credit check.