



JOB TITLE: Operations Administrator – Band 2

DATE: May 2026

REPORTS TO: Associate Director Operations

LINE MANAGE: N/A

PURPOSE OF ROLE

- To provide the Associate Director with document designer and PC exceptions reporting support, maximising back-office system functionality and ensuring changes are successfully embedded across Becketts
- Support the delivery of projects to enhance the services delivered to clients
- Produce a range of regular and ad-hoc reports and data analysis, and assist with system, IT and operational queries that arise

KEY RESPONSIBILITIES

- Develop and maintain document designer templates ensuring these are set up in the most efficient way for the end user, and any new functionality is implemented
- Assist in testing and implementing new functionality available on the back-office system
- Maintain and continuously look to improve Becketts' systems and processes, providing support and training where necessary
- Support the updating of systems and processes to enable data cleansing and running various reports. Liaise with team members as required
- Ensure data accuracy and consistency across systems, escalating issues where required
- Work collaboratively across teams to ensure consistent use of systems and adherence to data standards
- Contribute or lead operational improvement projects focused on improving efficiency, data accuracy, and client service delivery. Identify inefficiencies and implement scalable solutions to improve system workflows
- Update tax year-end legislation changes across a number of systems
- Support the mapping and documentation of processes to improve consistency and performance
- Maintain and update your own talent development record via the Beckett Academy app, ensuring my objectives are up to date and impact of any training is recorded

PERSON SPECIFICATION

ESSENTIAL

DESIRABLE

QUALIFICATIONS

- Project management

EXPERIENCE

- Data analysis and reporting
- Maintaining and developing CRM or back-office systems
- Contributing or managing small-scale projects

- Experience delivering larger-scale projects

KNOWLEDGE

- Mandatory compliance training
- Commercial awareness and understanding of business operations
- Experience with company-specific systems (or similar platforms)

- Awareness of process improvement methodologies

SKILLS & ABILITIES

- Strong attention to detail and accuracy
- Excellent organisational and prioritisation skills
- Analytical, with the ability to interpret and present data clearly
- Ability to follow procedures and identify issues
- Clear written and verbal communication
- Ability to build positive working relationships
- Intermediate MS Word & Excel skills
- Advanced Word & Excel skills

COMMUNICATION AND SOCIAL SKILLS:

- Team working
- Ability to build and maintain relationships

PERSONAL ATTRIBUTES

- Professional and accountable approach to work
- High levels of trust, integrity, and reliability
- Proactive mindset with curiosity and a focus on continuous improvement
- Collaborative and supportive approach to teamwork
- Willing to help and support the wider Becketts team

KEY PERFORMANCE INDICATORS

- Accuracy and integrity of system data
- Successful delivery and implementation of process and system improvements
- Positive feedback from colleagues and stakeholders

MAIN CHALLENGES OF THE ROLE

- Managing the volume and prioritisation of work, ensuring high levels of accuracy
- Developing and maintaining a detailed understanding of systems and processes
- Changing and embedding systems and processes, creating more efficient support teams

SIGNATURE

I agree to the above description of my responsibilities.

JOB HOLDER:

Signature:

Print Name:

Date:
