



JOB TITLE: Operations Apprenticeship – Band 1

DATE: 1 May 2026

REPORTS TO: Associate Director Operations

LINE MANAGE: N/A

PURPOSE OF ROLE

- To provide support to the Operations Department, maximising back-office system functionality, producing a range of reports and data analysis, and assisting with operational queries
- Involvement in a number of projects to enhance the services delivered to clients and supporting the teams including keeping records updated on the back-office system and other systems

KEY RESPONSIBILITIES

- Update various records, primarily on IO (back-office system) for data cleansing and running various exception reports and team liaison
- Maintain and evolve a number of systems and processes to help keep the support teams working effectively
- Provide data analysis and reporting across the back-office with a focus on core client data we hold ensuring the team are keeping records up to date
- Assist with testing and implementing new functionality available on the back-office system
- Involvement in a wide variety of projects, which will enable business and team efficiencies and benefit from new technology as it becomes available, including client processes
- Update tax year-end legislation changes across several systems
- Working with Document Designer on the template area of IO, which we use to set up and maintain a wide range of documents for the teams to use
- Advise and support on IT queries where possible
- Compile data for bulk mailings from IO
- Maintain and update my talent development record, via the Beckett Academy App, ensuring my objectives are up to date and the impact of any training is recorded

PERSON SPECIFICATION

ESSENTIAL

DESIRABLE

QUALIFICATIONS

	<i>ESSENTIAL</i>	<i>DESIRABLE</i>
EXPERIENCE	<ul style="list-style-type: none"> • Data analysis 	<ul style="list-style-type: none"> • Producing data and reports • Software development
KNOWLEDGE	<ul style="list-style-type: none"> • Mandatory compliance training 	<ul style="list-style-type: none"> • Commercial awareness • Company specific software
SKILLS & ABILITIES	<ul style="list-style-type: none"> • Strong Attention to detail/accuracy • Basic numeracy and data handling skills • Computer literate • Analytical 	<ul style="list-style-type: none"> • Advanced Excel skills

-
- Good organisation and prioritisation skills
 - Good Time management and reliability
 - Ability to identify and raise any issues or errors
 - Ability to follow rules and procedures
 - Willingness to learn and take feedback
 - Good at problem-solving

**COMMUNICATION
AND SOCIAL SKILLS**

- Team working
- Ability to build and maintain relationships
- Communication – written and verbal

**PERSONAL
ATTRIBUTES**

- Behaving in a professional manner
- Trust and integrity
- Curiosity and willingness to learn and improve
- Willing to help and support the wider Becketts team
e.g. covering reception/IT queries

KEY PERFORMANCE INDICATORS

- ✓ Accurate information provided
- ✓ Positive feedback from colleagues
- ✓ Timely completion of work/projects

MAIN CHALLENGES OF THE ROLE

- Managing the volume and prioritisation of work, ensuring high levels of accuracy
- Understanding the back-office system IO and all the various areas
- 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:
