



JAMAICA MONEY MARKET BROKERS LTD

JOB DESCRIPTION & SPECIFICATIONS

JOB TITLE: JNR. WORKFORCE & REPORTING ANALYST

DEPARTMENT: Group Client Care Centre – (JA, TT & DR)

REPORTS DIRECTLY TO: Client Care Workforce & Reporting Analyst - Group

SCOPE OF JOB: Jnr. Workforce and Reporting Analyst monitors the daily functions of scheduled agents in real time; documents, analyses productivity and other workflow data to ensure the agreed service delivery standards are met in every workgroup. Responsible for preparing accurate and timely variable forecasts in a high volume contact centre, with specific focus on improving the client experience and maximizing operational efficiencies.

INDIRECT REPORTEES: None

MAIN DUTIES & RESPONSIBILITIES:

1. Monitors the day to day function of scheduled agents to ensure agent productivity, centre's KPIs and service standards are met. This is achieved through a variety of processes, including the monitoring of workgroups; inbound, outbound, digital queues handled by the Client Care Officers.
 - a. Real Time monitoring of the day to day function of scheduled agents via Cisco Finesse to ensure agent productivity, centre's KPIs and service standards are met
 - b. Maintain allocation (duties) and change management logs and review impact with appropriate leaders
 - c. Serve as initial point of contact for network/system failures, interruptions and outages by maintaining logs for these issues
 - d. Facilitate scheduled and unscheduled workgroup changes to meet real-time efficiency goals

- e. Make recommendations to processes that involve workgroup changes (e.g., moving volume, moving agents, etc.) and staff optimization (e.g., implementing overtime, voluntary time-off unpaid, intra-day schedule modifications) to meet centre's KPIs
2. Support the Reporting process on the performance of the Centre and Agents:
 - a. Prepare, develop, analyse and disseminate daily, weekly, monthly and quarterly reports and presentations regarding Key Performance Indicators (KPIs) and other key statistical data presented to Leadership Team.
 - b. Analyse phone, email and chat interval data within workforce management tools to ensure data is accurate for forecasting as needed.
 - c. Generate and analyse Client Care logs to garner client trends and identify opportunities to proactively improve the client experience.
 - d. Identify potential trends in performance gaps and recommend solutions for improved efficiencies, specifically within workforce management, call centre data dashboards and survey data repositories.
 - e. Analyse raw data and develop written reports, summaries, charts, diagrams and graphs for various internal and external sources that support data findings.
 - f. Consulting with leadership team regarding trends and changes required to promote success and growth within the Group's and Department's strategic objectives.
3. Managing the Forecasting needs of the Centre to drive manning and resource requirements in maximizing operational efficiencies
 - a. Create long term, interim and short-term forecasts derived from understood business drivers.
 - b. Maintain and analyse records of actual volumes compared to forecast.
 - c. Understand reasons for forecast variance and recommend changes to enhance forecast accuracy and effectiveness.
 - d. Maintain staffing and headcount records, and support the development of hiring plans for long and short range planning efforts.
 - e. Monitor the adherence and attendance records for the department.
 - f. Maintain detailed records of call/skill set statistics and call arrival patterns to maximize forecasting accuracy capability, ensuring cost effective labour utilization
 - g. Maintain detailed records of electronic communication/skill set statistics and electronic communication patterns to maximize forecasting accuracy capability, ensuring cost effective labour utilization
 - h. Accurately track actual Client Care Centre output at the process and activity level as needed for productivity analysis and resource forecasting
 - i. Study department work, vacation and absence records (shrinkage) for on-going historical trend analysis and forecasting purposes.
 - j. Utilize practical problem solving methods to accurately define problems, generate alternatives and implement counter measures that permanently resolve scheduling and forecasting problems by addressing their root cause.
 - k. Facilitate bi-monthly interval-level forecast meetings and monthly long-term strategic discussions with Client Care Centre leadership team
4. Effective use of Cisco Unified Workforce Optimization Tools to (once Group Client Care Workforce & Reporting Analyst is unavailable)

- a. Prepare appropriate work schedules for staffing to ensure efficient use of resources.
 - b. Monitor workload to determine adequacy of staffing and makes necessary adjustments.
 - c. Manage changes to scheduling to ensure adequate daily resource coverage.
 - d. Make recommendations and prepares justifications to meet resourcing needs as required.
 - e. Monitor clients' wait time on the telephone, digital channel and designs systems and procedures to reduce it.
5. Supports Individual performance assessment through:
- a. Contributing to the preparation of the weekly or bi monthly Individual Score Card as required for Client Care Officers.
 - b. Supporting agents being aware of all new and existing policies, processes and procedures.
 - c. Identifying the knowledge/ skill/ attitude deficiencies in Client Care agents gleaned through interaction and recommending solutions.
6. Supports the effective implementation of new processes/procedures in the centre by:
- a. Recommending the modification/adaptation of processes/procedures to account for any nuances for this delivery channel.
 - b. Drafting procedures and submits for validation, when necessary, that will enhance customer service or as it relates to department.
 - c. Supports the maintenance and updating of the any document used in the Client Care, eg, the Client Care Operational Manual.
7. Helps to fulfil JMMB' contract with the client through after-sales service such as:
- a. Accepting clients' requests for documents, advising them of a response date, and assigning the responsibility to a Client Care Officer.
 - b. Interpreting market events and trends in communication with clients.
 - c. Acting as one of the mediums for disseminating authorised information to clients.
 - d. Referring client to in-house expertise, as is appropriate and necessary.
 - e. Providing complex analysis to answer business problems by being a data subject matter expert.
8. Supports the strategic objectives of the department through research & best practices:
- a. Conducts research to keep abreast of industry changes, best practices and trends as it relates to workforce management in the Call Centre environment
 - b. Identify opportunities to deliver client value proposition through business process improvement, organizational change and/or technology integration.
 - c. Develops, implements and documents best practices to ensure all workforce and reporting functions are in line with industry standards and business processes.
 - d. Maintains professional and technical knowledge by tracking emerging trends in call centre operations management; attending educational workshops; reviewing professional publications; establishing personal networks; benchmarking state-of-the-art practices; participating in special projects and support teams.
9. Supports general operations of the centre and general duties:
- a. Provide feedback to the Company/Branches/Departments based on information gleaned from reports.
 - b. Participate in the department's strategic planning and budgeting process.

- c. Engage the commitment of department team members in fulfilling their designated emergency roles in the Business Continuity Plan.
- d. Hear Clients' concerns, assesses the situations and provides solutions, to assist in meeting their financial goals, while observing the Company's limits for risk exposure.
- e. Provide direction, fosters teamwork and supervises team members to excite them to excellence and to facilitate efficient, effective, caring operations.
- f. Promote the JMMB's philosophy of the Vision of Love and its unique culture.
- g. Engage in the transformation process for the continuous improvement of JMMB and its associated companies.
- h. Attend and actively participates in training sessions assigned.
- i. Perform any other duties which may be assigned from time to time.

EDUCATION, TRAINING & WORK EXPERIENCE REQUIRED:

- First Degree in Management, Finance or Communications.
- Licensed by the Financial Services Commission, or a suitable candidate for licensing.
- In-depth knowledge of financial sector instruments, laws, regulations, ethics and professional jargon.
- Excellent oral and written communication skills. Working knowledge of one of the major foreign languages.
- Expert in the use and basic maintenance of Call Centre technology. Certified or in pursuit of course in Call Centre Operations. Working knowledge of CISCO telephone system would be a distinct asset.
- Proficient in the use of computers, particularly spreadsheets and word-processing.
- At least three years' work experience at a senior level in the Customer Service or Financial Advisory section of a financial institution. Experience in supervising Call Centre Operations would be a distinct asset.

AUTHORITY:

- To liaise directly with a Team Leader where a consistent problem is identified through the Client Care Centre.
- To request required data from other Team Leaders/ Department Heads.
- To initiate process reviews and monitor changes in the workflow arrangements.
- To scout for and pursue new clients.
- To re-arrange the staff schedule to accommodate changes in demand
- To recommend use of Temporary staff when needed.
- To set deadlines and prioritise tasks for team members.
- To identify and recommend seminar/courses/programmes which would enhance own on-the-job skills.
- To recommend or to implement awards and/or disciplinary action for a Team Member.
- To approve requests for earned Leave for team members.

LIAISES WITH: **External** and **Internal** contacts absolutely essential for carrying out the duties of this position. (e.g. *CONTACT – Bank of Jamaica; FREQUENCY - daily/on-going; REASON - to confirm repurchases for JMMB; HOW – via telephone*).

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EXTERNALLY	FREQUENCY & HOW	REASON
All Clients or service providers	Daily. Via telephone, in writing, via e-mail or social media.	To disseminate or collect information.
INTERNALLY	FREQUENCY & HOW	REASON
Branches and FACT	Daily. Via telephone, in writing and via e-mail.	To disseminate or collect information to assist in processing Client transactions.
All other departments	As needed.	To assist in processing Client’s request.

WORKING CONDITIONS: List both the positive and negative working conditions associated with this job (e.g. *PHYSICAL - office environment, exposure to dust; SPECIAL - frequent travel, being on 24-hour call, numerous critical deadlines*).

PHYSICAL	FREQUENCY	% OF TIME
Normal office environment.	Daily	100%
SPECIAL	FREQUENCY	% OF TIME
High stress level due to constant need handle incoming calls, particularly irate and difficult ones.	As needed.	20%