JOB DESCRIPTION TEMPLATE

Mortgage Data & Automation Analyst

Build reliable mortgage workflow reporting and approved automations that reduce rekeying, surface exceptions and give brokers a clearer view of pipeline performance.

Organisation	[Organisation name]
Location & work model	[Location; onsite, hybrid or remote]
Employment type & hours	[Employment type, weekly hours and time-zone overlap]
Remuneration	[Confirmed pay range, currency, superannuation and any incentive terms]
Reports to	[Named manager; suggested position: Operations analytics or technology manager]
Systems & access	[Approved systems, records and access scope]
Authority & supervision	[Permitted tasks, decisions, reviewer and escalation route]
Required qualifications	[Employer-confirmed licences, registrations, training or accreditations]

About the organisation

[Describe the actual business, team and customers in two or three factual sentences.]

Key responsibilities

- Define and maintain reports for lead conversion, application stages, turnaround time and file exceptions.
- Map approved CRM and workflow data fields, then reconcile report totals to source systems.
- Test automation changes on non-production or de-identified cases and document rollback steps.
- Monitor failures and route client, credit or hardship decisions to authorised team members.
- Document metric definitions and distinguish waiting time from active work.
- Test automation with fictional records and approved permissions before changing production workflows.

Capabilities & first 90 days

Essential capabilities

- Experience with SQL, spreadsheets, business intelligence or workflow automation.
- Understanding of Australian mortgage stages and the importance of source-data accuracy.
- Ability to document access, testing, approvals and incident escalation.

Useful experience

SQL | BI dashboards | CRM integrations | Data quality | Workflow automation

Keep these desirable rather than essential unless the work requires them on day one.

Working relationships

Broker operations, systems owners and reporting teams. Confirm the actual owners and handoff routes.

First 90 days

Agree the pace, reviewer and measures with the person you hire.

30 days

Map one approved data flow and agree definitions with its business owner.

60 days

Deliver a validated report or controlled automation with exception handling.

90 days

Review reliability and user adoption and correct one recurring data-quality cause.

How to apply

[Application route, closing date, contact and any adjustment request process.]

We assess candidates against the role-relevant criteria and use a fictional work sample.

Hiring guide

For the hiring team. Remove this page from the public advertisement.

Interview prompts

1. How would you prove that a dashboard or automation is using the right records and business definitions?

2. Describe a relevant piece of work, the checks you used and what you did when the instructions or evidence were incomplete.

3. How would you organise competing deadlines, record your decisions and escalate a risk to the next handoff?

A practical work sample

Analyse a fictional pipeline dataset, document a metric and identify duplicates. Propose a small automation with validation, error handling and a rollback plan.

Use fictional information and the same instructions for shortlisted applicants. Agree adjustments and timing beforehand. Score accuracy, reasoning, communication and appropriate escalation; this exercise should not produce live client work.

Before posting

- Replace every bracketed field with the actual employer, working arrangement and pay terms.
- Choose the duties the role will really own; remove unrelated tasks and separate essential from trainable skills.
- Confirm the task authority, supervision, qualifications and access with the responsible employer or licensee.
- Check pay and conditions against the applicable employment requirements before advertising.
- Use the same role-relevant selection criteria and fictional work sample for shortlisted applicants; invite adjustment requests.
- Name the reviewer and agree realistic first-90-day outcomes before the person starts.

Employer reference points

ASIC: Credit authority and appointment

Fair Work Ombudsman: Pay and advertised conditions

Fair Work Ombudsman: A clear hiring process

OAIC: Information and access

Open this role template online