

AI & Automation Specialist

Division/Department	Information Technology
Reports to	AI Product Lead
Responsible for	AI and Automation Services for the IHP group
Direct reports	None

Role Overview

You will lead in a hands-on delivery role responsible for building and deploying automation and agent solutions using approved Microsoft 365 tooling. You will be responsible for converting prioritised use cases into secure, supportable releases and establishing reusable delivery patterns.

Key Areas of Responsibility

- Build and deploy automation and agent solutions, taking prioritised use cases from idea to production.
- Configure and enhance CoPilot Studio agents and Power Automate workflows within agreed boundaries.
- Shape technical delivery option for each use case, selecting pragmatic patterns that can be reused and scaled.
- Implement secure by design controls in solutions, including permissions, access boundaries, and least privilege.
- Produce production ready assets including error handling, logging, support notes, and handover documentation.
- Work with Information Security, Cyber and Technology Risk to ensure delivery aligns to policy, audit actions, and control requirements.
- Support testing and release activity, including defect resolution and early life support.
- Contribute to benefits capture by defining measurable outcomes for delivered solutions and supporting evidence collection.

Education and Knowledge Requirements

Essential	Desirable
<ul style="list-style-type: none"> • Strong working knowledge of Microsoft 365 automation and agent tooling (Power Automate and CoPilot Studio). • Understanding identity, access, and permissions concepts in Microsoft 365 and how they affect data exposure. • Knowledge of all delivery standards for supportable production releases (release, rollback, monitoring, documentation etc.) • Strong grasp of data access, permissions and information risk concepts in an enterprise. 	<ul style="list-style-type: none"> • Knowledge of Power Platform governance (environments, DLP policies, connector risk). • Familiarity with Microsoft Purview concepts (sensitivity labels, DLP, audit) and their impact on automation. • Awareness of SharePoint information architecture principles and how they influence automation outcomes.

Experience Requirements	
Essential	Desirable
<ul style="list-style-type: none"> Delivered production automations using Power Automate, including approval flows, data processing, and notifications. Built or configured CoPilot Studio agents or equivalent conversational/agent capability in a governed environment. Experience integrating M365 tooling with business applications via connectors and APIs where approved. Experience working in regulated environments with strong control expectations and auditability. Experience translating business problems into technical solutions and iterating from MVP to stable release. Experience implementing secure access patterns, managing permissions, and avoiding oversharing risk. Experience producing supportable solutions with logging, error handling, documentation and clean handover. Experience supporting test cycles, fixing defects, and providing early life support post release. Experience shaping solution designs for AI and automation use cases. Experience producing decision ready artefacts and documentation. Experience transitioning delivered capability into BAU operations. Experience managing challenging and complex technology scenarios 	<ul style="list-style-type: none"> Experience with Power Apps where relevant to automation patterns. Experience with Continuous Improvement (CI/CD) approaches for Power Platform. Exposure to value measurement approaches (time saved, cycle time, quality improvements).
Attributes	
<ul style="list-style-type: none"> Integrity, Ethics and Values: Integrity objectivity, accountability, openness, honesty and leadership at all times in every aspect of the role - standard bearer for doing the 'right thing' – Selflessness. Courage: Confidence enough to challenge the executive directors' and non-executive directors views as appropriate with constructive suggestions and alternative proposals. Able to communicate in a balanced and considered manner. Facts and Experience – You use both facts and experience to make your decisions. You can quickly evaluate a situation to understand desired outcome and how to get there. Communication: Effective at all levels; to all audiences, clear, with impact and influence in both oral and written form. Credibility: Highly motivated with the ability to use own initiative; a respected business partner with strong intellect and analytical ability; a lateral thinker with a passion for the utopia of the balanced risk/reward business approach. 	

- Sense of fun: You are passionate and you care, but you want to have fun with those you work with doing it.

Competence Requirements

Working with others (Level D)

Works collaboratively with others to achieve common goals

Impact and influence (Level D)

Builds rapport, uses persuasion and influence to obtain support and buy-in for activities to the benefit of the business

Leadership (Level D)

Demonstrates an ability to drive, motivate and inspire both self and others to achieve goals

Developing self and others (Level D)

Develops self and others, showing a genuine interest in helping others reach their potential

Achievement orientation (Level D)

Works to achieve results and improve individual and company performance through what they do

Customer orientation (Level D)

Develops and maintains strong relationships with our customers and understands how this relationship is central to Transacts success

Relationship building (Level D)

Builds mutually beneficial, collaborative, long term relationships both internally and externally

Planning and organising (Level D)

Has ability to plan, organise and prioritise work

Innovation and continuous improvement (Level D)

Seeks and uses ideas to continually improve performance or themselves and the business

Analytical thinking and decision making (Level D)

Has ability to analyse, investigate and interpret information, issues and situations to make the right decisions in a timely manner

Financial and business awareness (Level D)

Understands what Transact does and the business environment in which it operates

Accountability

As a financial services company we are bound by various rules and regulations. In this role you are particularly accountable for these areas:

Compliance and Risk

- Adhere to all processes and deadlines as required by the Group Compliance department in line with regulations.
- Understand the risks, control and governance requirements for the group and flag and escalate risks and error within your remit.
- Comply with all internal policies and procedures.
- Comply with the Individual Conduct Rules.

Training and Competence *

All of our staff are expected to acquire and maintain the desired level of competence for their role which requires them to have the skills, knowledge and expertise needed to discharge the responsibilities of their role. This may include Continual Professional Development (CPD).

You are required to:

- Undertake all training required for your role.
- Attend and participate in internal training courses as required by your role.
- Undertake continual professional development relevant to your role.
- Continue to maintain technical knowledge and contribute to the development of the knowledge of other team members.

* For definitions, please see the T&C Guide