

**APPENDIX ONE:**  
Position Description



POSITION TITLE:	People Operations and Improvement Lead
LOCATION:	Head Office, Tauranga
PEOPLE LEADER:	Chief People Officer
TEAM:	People & Performance

At Craigs (CIP) we are focused on helping our clients to achieve their financial goals and grow their wealth. We believe that where a client's financial future is concerned, our people are fundamental to achieving this. Our collective skills, knowledge and commitment means that we can provide the best possible outcomes for our clients.

The People Operations and Improvement Lead is accountable for the ownership, delivery, and continuous improvement of core People & Performance operational processes across the employee lifecycle. This role provides trusted P&P generalist support to People Leaders and employees, ensuring practical guidance, consistent process application, accurate data management, and a positive employee experience.

A core focus of the role is leading reliable, efficient, and compliant People operations. This includes ownership of P&P administration processes, employment documentation, employee records, onboarding and offboarding workflows, system configuration and testing, and the implementation and ongoing maintenance of the performance framework within Culture Amp. The role also owns the employee engagement survey cycle, including project planning, survey configuration, data integrity, reporting, analysis, and coordination of follow-up actions.

This position requires strong attention to detail, sound judgement, exceptional organisational skills, and a proactive approach to problem solving, process leadership, and continuous improvement. By owning reliable, solutions-focused People processes and identifying areas of operational, compliance, or people-related risk, the People Operations and Improvement Lead enable the wider People & Performance team and People Leaders to operate effectively, reduce complexity, and deliver meaningful outcomes for the organisation.

## WHAT I DO

### GENERALIST SUPPORT AND PROCESS IMPROVEMENT

- Proactively identify, prioritise, and lead continuous improvement and process improvement initiatives across People & Performance to simplify processes, improve consistency, reduce risk, and strengthen the employee and People Leader experience.
- Own P&P operational processes, including process documentation, workflows, controls, and ways of working, ensuring they remain current, clear, compliant, and easy to follow.
- Identify and implement technology enablers, including appropriate use of automation and AI, to improve accuracy, efficiency, and sustainability of routine P&P administration.

- Own and deliver P&P generalist support to the business, providing timely and practical guidance to People Leaders and employees on people processes, policies, systems, and employee lifecycle matters.
- Ensure P&P processes meet legislative, regulatory, policy, and internal compliance requirements, proactively identifying and mitigating areas of operational and people-related risk.

## LEAD THE P&P ADMINISTRATION FUNCTION

- Lead timely responses to employee and manager enquiries, including queries regarding policies, leave management, benefits, employment changes, onboarding, exiting, and other P&P operational matters, including responses through shared team mailboxes.
- Manage contracts and review dates, liaising with Business Partners, People Leaders and employees to confirm and action any changes and / or extensions required.
- Own document controls and document management practices, creating consistency, accuracy, and compliance across P&P templates, records, and employee documentation.
- Responsible for our Employment Agreement templates, ensuring we maintain compliance and leading legal reviews and updates as necessary.
- Prepare contracts and variations in conjunction with People Leaders and Business Partners as required.
- Own the implementation, administration, and ongoing maintenance of the performance framework within Culture Amp, including cycle configuration, testing, communications support, data integrity, reporting, and continuous improvement of the process.
- Own and coordinate Health, Safety and Wellbeing operational processes, including leading the quarterly H&S meetings, incident reporting, return-to-work coordination, workstation assessments, reporting, documentation, follow-up actions, and related compliance requirements.
- Support organisational change initiatives, ensuring a smooth transition for employees.
- Own reporting and analytics for defined P&P operational areas, ensuring data is accurate, meaningful, timely, and suitable for dashboards, governance reporting, business insights, and decision making.
- Own the creation and maintenance of electronic employee files, ensuring accuracy, consistency, and compliance with internal processes.
- Provide leadership and continuity across P&P processes by covering key team activities when required.
- Maintain accurate employee data across P&P systems, ensuring data quality, privacy, compliance, and integrity are maintained.
- Own the employee engagement cycle end to end, including survey planning, project management, system configuration, communications coordination, data integrity, reporting, analysis, and tracking of follow-up actions.

## RECRUITMENT, ONBOARDING AND EXITING

- Coordinate with the relevant Business Partner business recruitment advertising activity, including drafting advertisements, placing roles online, and coordinating recruitment administration as required.
- Lead pre-employment check coordination, including reference checks, criminal history checks, and AML checks.

- Own onboarding coordination for new employees, including process management, documentation, stakeholder notifications, system-related requirements, and liaison with People Leaders, Digital, Marketing, Compliance, Payroll, and other internal stakeholders.
- Responsible for the preparation of employment agreements and onboarding documentation. Ensuring employment agreements are consistent and tailored to the position being offered.
- Responsible for the exiting/offboarding process in conjunction with People Leaders and Business Partners, ensuring documentation, communications, system actions and compliance steps are completed accurately and on time.
- Own the exit survey process, ensuring leavers are provided with surveys, completion is followed up, face-to-face interviews are coordinated where appropriate, themes are analysed, and insights are reported to the P&P team.

## PAYROLL

- Coordinate with the Payroll Specialist and P&P Coordinator on payroll delivery, including monthly, end-of-month, and out-of-cycle pays.
- Provide backup payroll processing support during peak periods, leave coverage, or where additional capacity is required.
- Support payroll preparation activities, including:
  - Monitoring submission and approval of leave and timesheets.
  - Setting up and maintaining accurate employee data in the system, inclusive of new hires, changes in work patterns, position changes, bank account changes, KiwiSaver.
- Support day to day payroll-related activities inclusive of:
  - Maintaining accurate and up-to-date employee payroll data.
  - Preparing and distributing payroll reports to relevant stakeholders as required.
  - Assist in managing the payroll inbox, ensuring timely and accurate responses to employee queries and requests.
  - Support the implementation of payroll-related changes and process improvements.
- Assist with internal and external audit requests as required.

## GENERAL DUTIES AND RESPONSIBILITIES

- Operate within the NZX rules and regulations, relevant legislation, and CIP procedures and policies.
- Maintain competence in Craigs Investment Partners' systems.
- Adhere to company policy and processes to safeguard client information against loss, unauthorized access, use, modification, or disclosure.
- Uphold core competencies determined by the Company.
- Complete all educational requirements set by the Company for the role.
- Follow prescribed administrative processes and policies, including supporting systems usage.
- Act professionally, ethically, and collaboratively within the Company's framework.
- Always act with integrity and treat clients fairly and respectfully.
- Perform any additional tasks assigned by your Manager.

## WHAT I VALUE

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At Craigs, we pride ourselves on creating an environment where our people feel they belong and can bring their best self to work and feel valued. We grow as a team and with our clients and are always looking to support our communities – both internal and external. Our values build the foundation of how we work and how we provide great outcomes for our people and clients.

## WHAT I BRING

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### Qualifications and Experience:

- Relevant experience in similar Human Resources roles (7+ years).
- Proficient with processing payrolls.
- Degree in Business or relevant other qualification, or similar body of knowledge.
- Previous experience with system administration particularly with payroll and/or HRIS systems.
- Proven experience in Continuous Improvement activities.
- Proficient with Excel, Word, PowerPoint, Adobe.
- Strong administrative & co-ordination background.
- Demonstrated team leadership or mentoring abilities.
- Proven experience in a corporate setting.

### Skills and Attributes:

- Strong Collaboration skills and proven ability to seek out improvements in cross functional teams
- Excellent time management and organisational capabilities.
- Attention to detail and pride in accuracy.
- High level of precision and focus on details.
- Strong written and verbal communication skills.
- Proactive and capable of demonstrating initiative.
- Intermediate proficiency in Microsoft Office, particularly Microsoft Excel

## NZX RULES REFERENCED WITH LEGISLATION AND POLICY

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The NZX Participant Rules can be found electronically at the following address -

<https://www.nzx.com/regulation/participant-rules>

CIP policies can be found on the Staff Intranet.