

|                 |                                     |
|-----------------|-------------------------------------|
| POSITION TITLE: | Learning and Development Specialist |
| LOCATION:       | Tauranga                            |
| PEOPLE LEADER:  | Head of People and Performance      |
| 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 purpose of the People & Performance team is to create an Exceptional People Experience. We strive for a culture that sets us apart. At our core, we thrive and lead by fostering meaningful contributions, promoting learning, growth, and creating a sense of belonging.

My primary focus as the Learning and Development Specialist is to assess company-wide development needs, design and implement effective training programs, and enhance the performance and productivity of our employees. This role requires a proactive individual with a passion for continuous learning and development.

#### WHAT I DO

- **Collaborate with Leadership:** Work closely with the P&P team and Leaders to identify training needs based on human resource initiatives, legal and regulatory changes, and career development needs.
- **Assess Training Needs:** Engage with the business and the P&P team to explore current and emerging capability gaps to create goals and objectives for training programs. Define the focus areas ensuring alignment with business priorities, regulation changes and employee growth.
- **Design and Develop Training Programs:** Create and implement training programs using various instructional methods such as classroom training, e-learning, and on-the-job training.
- **Deliver Training:** Facilitate training sessions and workshops, ensuring that all employees receive the necessary skills and knowledge.
- **Evaluate Training Effectiveness:** Develop testing and evaluation procedures to measure the effectiveness of training programs and make improvements as needed.
- **Manage Learning Management System (LMS):** Maintain and manage the company's LMS, ensuring all training materials are up-to-date and accessible.
- **Develop Training Materials:** Create training manuals, multimedia visual aids, and other educational materials.
- **Monitor and Report:** Maintain records of training activities, attendance, and results, and prepare reports on training outcomes.
- Maintaining the CIP & external study/qualifications register, and working in conjunction with the wider P&P team to maintain policy/guidelines on L&D.

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

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

CIP policies can be found on the Staff Intranet.

## WHAT I VALUE

---



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 our clients.

I demonstrate the Craigs' values every day and encourage, support and enable my colleagues to do too.

## WHAT I BRING

---

- Qualification/s, Knowledge and Experience
  - Tertiary qualification or equivalent in a related discipline.
  - Experience of integrated 'On the Job' training of adult learners, preferably in finance or similar industries.
  - Knowledge of, and experience within, a financial services or highly regulated environment (preferred).
  - Familiarity with the key roles within Private Wealth and the measures of competency within these roles.
  - High aptitude for computer systems with an ability to understand complex IT systems.
  - A basic understanding of converting business processes and competency requirements into learning outcomes.
  - An intermediate level of ability to design training solutions.
  - Familiarity with learning and development practices and principles. Including:
    - Learning needs analysis (LNA);
    - Competency frameworks;

- Instructional design / development of training content;
  - E-learning platforms and learning management systems; and
  - Learning measurement models.
- Skills and Attributes
  - Strong written and verbal communication skills.
  - Excellent internal and external consulting skills, including effective influencing and relationship management.
  - Ability to collaborate and work with a range of stakeholders.
  - Business acumen, with the ability to align learning initiatives with business goals.
  - Proven ability to plan and prioritise a program of work, which deliver results.