

POSITION TITLE: **AI Designer**

LOCATION: Tauranga

REPORTS TO: Head of Digital, Data and AI

TEAM Digital Business

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 mean that we can provide the best possible outcomes for our clients.

The purpose of this position is to drive the successful identification, prioritisation, and delivery of AI use cases as a key member of the AI Enablement Programme. The AI Designer's primary responsibility will be to work closely with business units across CIP to discover high-value opportunities for AI-powered solutions, guide them through a structured evaluation and development process, and ensure they are delivered into production with measurable business benefits.

Reporting to the Head of Digital Architecture & Strategy, this role will work closely with AI Engineers, Subject Matter Experts, the AI Working Group's AI Agent Sub-Committee, and the Business Change Management Group. The AI Designer will be instrumental in bridging the gap between business needs and technical AI solutions, ensuring that every AI Agent delivered meets CIP's standards for quality, usability, and measurable impact.

WHAT I DO

Use Case Discovery & Prioritisation

- Engage with business units across CIP to solicit, capture, and document AI use cases that would deliver the greatest benefit to both the business and its clients.
- Develop and maintain a structured use case register, assessing each opportunity against criteria including business value, feasibility, strategic alignment, and implementation complexity.
- Prioritise use cases using a consistent scoring framework and present the top candidates to the AI Working Group's AI Agent Sub-Committee for selection.
- Prepare clear business cases for recommended use cases, articulating the expected benefits, resource requirements, and indicative timelines.

Process Design & Documentation

- Once top use cases are selected by the Sub-Committee, work with Subject Matter Experts (SMEs) to map the current-state processes using Flowingly, CIP's process modelling tool.

- Design the future-state processes incorporating the proposed AI Agent capabilities, clearly documenting the changes, decision points, and handoffs.
- Ensure process documentation is thorough, accessible, and suitable for handover to AI Engineers for prototyping.

Prototyping & Testing

- Collaborate with AI Engineers to initiate and support the prototyping of AI Agents based on the documented future-state processes.
- Develop test plans and acceptance criteria for each AI Agent prototype, ensuring alignment with the original use case requirements.
- Conduct thorough testing of AI Agent prototypes, documenting results, identifying defects or gaps, and coordinating resolution with the engineering team.
- Ensure AI Agents perform reliably, accurately, and within acceptable tolerances before progressing to stakeholder demonstration.

Demonstration & Approval

- Prepare and deliver formal demonstrations of completed AI Agent prototypes to the Head of Digital Architecture & Strategy and the AI Agent Sub-Committee.
- Present testing outcomes, performance metrics, and recommendations for production readiness.
- Coordinate any required amendments or refinements identified during the approval process.

Change Management & Training

- Upon production approval, partner with the Business Change Management Group to develop a comprehensive training and communications plan for each AI Agent.
- Create training materials including user guides, quick-reference cards, and demonstration recordings as required.
- Participate in and deliver end-user training sessions, ensuring staff are confident and competent in using the new AI Agent.
- Support the transition from project delivery to business-as-usual operations, ensuring a smooth handover.

Benefits Tracking & Realisation

- Define measurable success metrics and KPIs for each deployed AI Agent in collaboration with business stakeholders.
- Conduct formal benefits reviews at 3-month and 6-month intervals post-deployment, measuring actual outcomes against the original business case.
- Report findings to the AI Agent Sub-Committee and programme leadership, identifying opportunities for optimisation or further development.
- Maintain a programme-level benefits register to track cumulative value delivered by the AI Enablement Programme.

Strategy

- Provide input and guidance to the AI Enablement Programme roadmap during reviews and updates, incorporating changes in business priorities and emerging AI capabilities.
- Maintain a high level of awareness of AI trends, tools, and best practices relevant to the financial services and wealth tech industries.
- Contribute to the continuous improvement of the AI use case evaluation framework and delivery methodology.
- Identify opportunities for scaling successful AI Agents across additional business units or processes.

Leadership

- Foster meaningful working relationships with business unit leaders, SMEs, AI Engineers, and the Business Change Management Group.
- Champion the adoption and benefits of AI within CIP, building enthusiasm and confidence across the organisation.
- Support a positive team culture within the AI Enablement Programme, fostering principles of innovation, collaboration, and excellence.

General Duties and Responsibilities

- Operate within the parameters of the NZX rules and regulations, relevant legislation and CIP procedures and policies.
- Maintain a high level of competence with Craigs Investment Partners' systems.
- Follow company policy and process to ensure client information is protected against loss, unauthorised access, use, modification or disclosure.
- Maintain the core competencies as set down by the Company from time to time.
- Complete all Company educational requirements as required for the role as set by the Company.
- At all times follow Company prescribed administrative processes and policies, including use of supporting systems.
- Act professionally, ethically and work co-operatively and constructively within the framework of the Company structure.
- At all times act with integrity and treat clients fairly and respectfully.
- Any other tasks as requested by your manager.

NZX RULES REFERENCED WITH LEGISLATION AND POLICY

- 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 clients.

WHAT I BRING

Qualifications

- A relevant tertiary qualification in business, technology, or a related discipline is desirable
- Qualifications or certifications in business analysis, process design, or change management are strongly desirable
- AI-related training or certification (e.g., AI fundamentals, prompt engineering, design thinking) is an advantage

Knowledge and Experience

- 2+ years' experience in a business analysis, process improvement, or change-related role
- Demonstrated experience capturing and prioritising business requirements or use cases
- Experience with process modelling or workflow documentation tools (Flowingly experience preferred)
- Exposure to AI, automation, or digital transformation initiatives is highly desirable
- Experience working with cross-functional teams including technology, operations, and senior leadership
- Experience developing and delivering training materials and end-user training sessions
- Familiarity with benefits tracking, business case development, or post-implementation review processes
- Good knowledge of the financial services / wealthtech industry and awareness of relevant trends

Skills & Attributes

- Strong stakeholder engagement skills with the ability to work across all levels of the business
- Excellent communication skills – able to articulate complex concepts clearly in presentations, reports, and demonstrations
- Analytical and structured thinker with the ability to assess, compare, and prioritise use cases based on business value
- Curious, proactive, and comfortable working in ambiguous or emerging technology spaces

- Strong facilitation skills for workshops, interviews, and committee presentations
- Effective relationship management with the ability to influence and negotiate with stakeholders
- Detail-oriented with a commitment to quality and thoroughness in testing and documentation
- Collaborative team player who can partner with AI Engineers, SMEs, and business change teams
- Comfortable working in an agile, iterative environment with rapid prototyping cycles
- Acting with honesty, integrity, and transparency in line with CIP values