

POSITION TITLE:	Marketing Events Executive
LOCATION:	Head Office, Tauranga
REPORTS TO:	Head of Marketing and Communications
TEAM:	Marketing and Communications

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 Marketing and Communications team is to develop the firms external and internal brand, marketing, and communications strategy in line with the strategic ambition of the Craigs business. Delivering successful events are a critical part of delivering exceptional customer experiences and supporting key business objectives.

Reporting to the Head of Marketing and Communications and working in close partnership with the National Marketing and Partnerships Manager, the Marketing Events Executive collaborates closely with the wider marketing team and stakeholders across the business. You are responsible for liaising with branches and Head office to plan, execute, and manage some of CIP's most high profile major events, while also supporting additional events as required.

The Marketing Executive must curate events that meet briefs, deliver on clear objectives and create a lasting, high-quality impression on attendees reinforcing our company's reputation for excellence.

## WHAT I DO

### MARKETING EVENTS EXECUTIVE

- Working with branches and head office for the development, planning, co-ordination, promotion, measurement and reporting of major events, including events in the Private Wealth MEV budget, in line with agreed strategies and company positioning. This includes events such as State of the Nation, Investor Day, Craigs Women Wealth and other large format events as these are scoped out and curated as required.
- Recommending strategic changes to event management and event formats within Craigs; this will require the review and audit of our own, and review of other hosted events in the market to provide recommendations for change and improvement to key stakeholders.

- Tasked to research and secure venues, planning, and managing our events' calendar, negotiating quotes and agreements with vendors, leading event marketing and promotion, monitoring timeframes and budgets, and delivering on event brief objectives.
- The Marketing Events Executive must understand risk management, to recommend procedures to mitigate and manage risk associated with events where appropriate.
- Be a CRM Super user. Be proficient around segmentation, list creation and email sends in the CRM system as well as proficiency across other various event software, to be able to identify and recommend ways to improve both the communication of events, and the event experience to elevate Craigs' brand position in the market.
- Planning and implementation of online events and webinars as required and directed by key stakeholders based on agreed priorities set by the Head of Marketing & Communications.
- Creation of event invites, presentations and contribution towards social media activities and PR around events both prior and post events as required
- Documentation of all event processes and detailed run-sheets, for risk management and agility within the team including training of team members.
- Major Events (MEV) budget and invoice management ensuring events are delivered to briefs and within budgeted costs. Monitoring and forecasting of the MEV budget events based on agreed events with the Head of Advisory and GMs and managing risk through providing recommendations that deliver within the MEV budget
- Measurement of and delivery of clear KPIs around event satisfaction, client / non client attendance and key criteria for continuous improvement through forms and survey platforms and provide regular communication of event results and recommendations to the GMs and adviser network as well as for marketing reports as required.
- Training of others in the team for cover.
- Any other tasks as requested by your manager, to provide support for other team members.

## HO & BRANCH MARKETING

- Provide resources and assistance to branch advisers to assist them with the implementation of their marketing plans or activation requirements as required.
- Liaison with external suppliers i.e. printers, agencies and advertising publishers.
- Create and update communication touchpoints and tools for branches relating to events, and key related projects as required.
- Provide active contribution around all communication touchpoints relating to events, and key related projects, including the Craigs website and intranet.
- Working within approved budgets.
- Any other tasks as requested by your manager, to provide support for other team members.

## BRANCH SUPPORT AND MAJOR EVENT CO-ORDINATION

- Provide support to branch advisers for development of digital content/ banners etc utilising marketing design platforms (CANVA) and other tools. Specifically lead the process for event invites for major events, MEV budget events and other events as needed.

- Manage the setup, implementation and measurement of events using Eventbrite and work with others to identify ways to improve, optimise use of event software and tools.
- Aid in the planning and execution of branch events, branch trade shows, and promotional activities supporting events.
- Working with our travel partner ORBIT events for venue and supply contracts as required – including the reconciliation and tracking of contractual budget lines and delivery – including ORBIT's costs.
- Assist with logistics, promotional materials, and on-site coordination as needed.
- Close liaison and management of events contractors as needed.
- Development of event signage and advertising as required.
- Assist with timely implementation of Craigs events; both national and large branch events as ringfenced and scoped.

## GENERAL DUTIES AND RESPONSIBILITIES

- Working within approved budgets.
- Provide support for CIP BAU communication tasks and flows that require a 'team' approach for delivery based on capacity as required
- Operate within the parameters of the NZX rules and regulations, relevant legislation, 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 of 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, incl 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.
- Demonstrate the Craigs' values every day and encourage, support and enable my colleagues to do too.

## 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/nzx-rules-guidance/participant-guidance>

CIP policies can be found on the Staff Intranet.

## 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 our clients.

## WHAT I BRING

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- Qualification/s
  - A degree in marketing, communications, or public relations
  - Events management qualification and at least 3-5 years in a senior event-marketing role with budget accountability
- Knowledge and Experience
  - Strong passion for event – marketing, and marketing disciplines with a desire to learn and grow in the field.
  - Experience or a working knowledge of events and digital marketing and communication tools and platforms such as Eventbrite or similar, CRM, email and survey software (e.g. click dimensions, survey monkey, mail chimp) or other digital or social media tools.
  - Strong commercial mindset.
  - Financial Markets background or interest is a strong asset.
  - Understanding and/ or familiarity with project management and/or coordination.
  - Understanding of marketing principles and concepts.
- Skills and Attributes
  - Excellent written and verbal communication skills.
  - Familiarity with social media platforms and digital marketing tools is a plus.
  - Attention to detail and ability to multitask in a fast-paced environment.
  - Creative mindset and willingness to contribute innovative ideas.
  - Strong organizational and time management skills.
  - Ability to work collaboratively within a team and take direction from senior team members and guidance and peer review by key stakeholders and peers.

- Attention to detail and proofreading skills are essential.
- Attention to detail and ability to manage multiple tasks and deadlines.
- A self-starter with the ability to show initiative and a valued team player is essential.
- Ability to adapt to changing priorities and work independently or as part of a team.
- Strong computer skills – MS Office; Word, Excel, PowerPoint, Outlook.