APPENDIX ONE:
Position Description

POSITION TITLE:	Learning and Development Trainer
LOCATION:	Flexible
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 Trainer is to assist with the design, development, and delivery of training to CIP team members. An emphasis of the training is on internal systems, branch operations, processes, products and services and any new software/process that is introduced to the network. The primary audience for this training will be Private Wealth Assistants, Associates and Investment Advisers but I also contribute to other CIP training. I travel within New Zealand in order to deliver the activities required in my role.

WHAT I DO

- TRAINING FOR NEW EMPLOYEES
    - In collaboration with key stakeholders across CIP, deliver Learning and Development strategic initiatives, such as:
        - Induction and refresher training for team members, including completing a training needs analysis and creating training plans with the relevant people leader/team member.
        - Delivering engaging and interactive training sessions both in-person and online to CIP team members.
        - Delivering training on standard induction training topics.
            - Evaluating training using CIP training evaluation tools.
    - Completing training administration associated with system familiarisation training.
    - Ensuring all training activity in CIP aligns with best practice learning methodologies.
        - RESPONSIVE TRAINING ACTIVITIES
    - Responsive training incorporates training to identify training gaps. This can include:
        - Working with people leaders and team members to address capability gaps and to develop training for these gaps.
        - Responding to queries from team members, including delivering 'Just in Time' training activities, phone support, email support and other methods to ensure competency levels are consistently high within CIP.

        - Developing and uploading learning content, including eLearning modules linked to responsive training activities.
        - Evaluating the increase in skills and competency arising from the responsive training activities

- PROJECT-BASED TRAINING ACTIVITIES
    - Contribute to projects within CIP that will impact on the success of the organisation. Be subject matter experts, testers, and trainers of project-based work. This may include:
        - Working with project teams to define the scope of training required in a project from a user level. Providing User Experience Input into the project (UEX).
        - Completing User Acceptance Testing (UAT).
        - Assisting to integrate new project learning into familiarisation training and responsive training programmes.
        - Creating knowledge-based Intranet pages for each project to assist with dissemination of product information.
        - Managing and coordinating the roll-out of training for each project.
        - Preparing and reviewing training materials.
        - Providing SME knowledge to the projects on specific aspects of business process.
        - Creating CPD materials and providing assistance to the network to have them loaded to the CIP eLearn.
        - Providing ongoing support with any new application that is delivered until it can be handed over to a new owner of the product.
- BUSINESS PROCESS ACTIVITIES
    - Assisting the business to keep business processes current. This may include:
        - Maintaining Study Support database and approvals for employees
        - Assisting in updating, where applicable, the Business Operating system
        - Facilitating and coordinating meetings
        - CIP eLearn platform maintained and reporting requirements are met.
    - Managing the end-to-end process for NZX accreditation, including:
        - Maintaining a current register of advisers under supervision and their designated supervisor; and
        - Managing NZX applications for advisers/dealers, including reviewing and collating NZX adviser/dealer applications and supporting documentation, liaising with stakeholders for the relevant approvals and submitting applications using the NZX portal.
    - Maintaining the CIP & external study/qualifications register, and working in conjunction with the Learning and Development team and Business Partners to maintain policy/guidelines on L&D.

NZX RULES REFERENCED WITH LEGISLATION AND POLICY

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.

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

- A relevant Adult Education qualification (i.e. the New Zealand Certificate in Adult and Tertiary Teaching (Level 5) or equivalent) is desirable.
- Experience of integrated 'On the Job' training of adult learners, in finance or similar industries.
- 3+ years' experience as a Private Wealth Assistant or Senior Private Wealth Assistant with successful completion of the Senior Private Wealth Assistant competency test (preferred).
- 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.
- 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.