

**APPENDIX ONE:**  
Job Description



POSITION TITLE:	Business Analyst
LOCATION:	Tauranga
REPORTS TO:	Lead Business Analyst

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.

As part of our strategic vision, we are undergoing a comprehensive technology transformation journey. As Business Analyst, you will play a pivotal role in the design and delivery of the transformation programme. Reporting directly to a Lead Business Analyst, this position is responsible for collaborating with Craigs Product Owners, SMEs, and Vendors to design and deliver future business process models that will meet strategic business objectives. The Business Analyst works collaboratively through all levels of process and user experience design from blueprint through to user stories, functional specifications, configuration, and support of SIT and UAT to implement the target operation model.

## WHAT I DO

- Stakeholder Engagement and Collaboration:** Engage with stakeholders across the organisation to foster a highly collaborative approach to project delivery. Build and maintain strong working relationships to ensure alignment with business needs and transformation goals.
- Collaboration with Product Owners:** Work closely with Craig's Product Owners throughout the design and delivery phases of the transformation program. Collaborate on identifying and prioritising product requirements, features, and functionalities that align with strategic objectives.
- Solution Blueprint Design:** Assist in developing high-level solution blueprints that outline the technology and process changes required for the digital transformation. Contribute to the creation of innovative solutions that drive efficiency and effectiveness across the organization.
- Business Process Design:** Lead the design of business processes that align with the target operational model and adhere to the program's design principles. Ensure that process changes promote optimal utilization of technology and enhance overall business performance.
- User Stories and Functional Specifications:** Write clear and comprehensive user stories and functional specifications that serve as guidelines for the development and configuration of technology solutions. Translate business requirements into actionable deliverables for the development team.
- Configuration of Technology Solutions:** Lead the configuration of technology solutions to meet the requirements outlined in the Continuous Improvement Program (CIP) solution requirements. Ensure that the solutions are aligned with the defined architecture and design principles.
- Product Design Artifact Review:** Facilitate the review of product design artifacts to ensure accuracy, completeness, and alignment with business objectives. **Collaborate with cross-functional teams to address feedback and make necessary adjustments.**
- Application and External Party Integrations:** Assist in the design and delivery of integrations between internal applications and external parties to enable seamless data exchange and process flow. Ensure that integrations are secure, efficient, and compliant with relevant standards.

9. **Continuous Improvement:** Solicit feedback from stakeholders and project teams to refine business analysis methodologies. Stay informed about industry best practices and integrate them into the organization's business analysis approach.
10. **Culture of change:** embody and promote a culture of change across CIP, ensuring all stakeholders engaged and have clarity of purpose and responsibility in their contribution to the realization of CIP's business change projects.

## GENERAL DUTIES AND RESPONSIBILITIES

- Operate within the parameters of the NZX rules and regulations and CIP procedures and policies.
- Provide general administrative support across the project.
- Maintain a high level of competence with CIP systems.
- Maintain the core competencies as set down by the firm.
- Complete all Company educational requirements as required for the role as set by the Company.
- Act professionally, ethically and work co-operatively and constructively within the framework of the company structure.
- Any other tasks as requested by your manager.
- Demonstrate the Craigs' values every day and encourage, support, and enable colleagues to do so also.

## 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	<ul style="list-style-type: none"> <li>• Relevant tertiary qualification in either Business Administration, Information Technology, or related field.</li> <li>• Business analysis qualification such as IIBA CCBA or CBAP (desirable)</li> <li>• Relevant work experience in Financial Services specifically wealth management, order execution, or custody operations</li> </ul>
Knowledge/Experience	<ul style="list-style-type: none"> <li>• 5+ years' experience delivering complex multifaceted business change</li> <li>• Experience working across multiple projects with complex dependencies</li> <li>• Reasonable level of industry knowledge in financial services</li> </ul>

Key Skills and Attributes	<ul style="list-style-type: none"><li>• Demonstrate the Craigs' values every day and encourage, support and enable your colleagues to do so also</li><li>• Strong analytical and problem solving skills</li><li>• Excellent verbal and written communication skills</li><li>• Naturally curious with high level of accuracy and attention to detail</li><li>• Good understanding of agile methodologies, tools and ways of working.</li><li>• Excellent time management and organisational skills</li><li>• Proactive with ability to work independently and prioritise time effectively</li><li>• Ability to build strong relationships with team members and stakeholders</li><li>• Honest &amp; trust worthy, in keeping with CIP values.</li></ul>
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## NZX RULES REFERENCED WITH LEGISLATION AND POLICY

	<b>NZX PARTICIPANT RULE</b>	<b>LEGISLATION</b>	<b>CIP POLICY</b>
3.24	Market Participants – Information Barriers	Financial Markets Conduct Act 2013	Information Barriers Policy
9.2	Client Advising – Required Client Information	Anti-Money Laundering and Countering the Financing of Terrorism Act 2009	Anti-Money Laundering
8.1	General Obligations - Conduct of Market Participants and Advisers	Code of Professional Conduct for Financial Advice Services	Code of Conduct
8.3	General Obligations - Confidentiality of Information	Privacy Act 2020 Code of Professional Conduct for Financial Advice Services	Code of Conduct Confidentiality Policy Privacy Policy
9.1 15.10	Client Advising - Duty of Care General Trading Obligations - Conflict Management Procedures	Code of Professional Conduct for Financial Advice Services	Code of Conduct Conflicts of Interest Policy Vulnerable Clients Policy
10.2 15.6	Trading - General Obligations - Market Manipulation General Trading Obligations - Suspected Insider Trading	Financial Markets Conduct Act 2013	Code of Conduct Insider Trading Policy
15.7	General Trading Obligations - Client Complaints	Code of Professional Conduct for Financial Advice Services	Complaints Handling and Disputes Resolution Policy
21.7	NZX Powers - Market Participants Obligation to Report	Protected Disclosures Act 2000	Whistle Blowing Policy Breach and Incident Policy
10.5	Trading - General Obligations – Prescribed Person Trading	Financial Markets Conduct Act 2013	Employee Trading 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.