

CFP BOARD

**CERTIFIED FINANCIAL PLANNER
BOARD OF STANDARDS, INC.**

**MANAGING DIRECTOR,
MARKETING & COMMUNICATIONS**

ABOUT CFP BOARD

Certified Financial Planner Board of Standards, Inc. is the professional body for personal financial planners in the U.S. CFP Board sets standards for financial planning and administers the prestigious CFP® certification — one of the most respected certifications in financial services — so that the public has access to and benefits from competent and ethical financial planning. CFP Board, along with its Center for Financial Planning, is committed to increasing the public's awareness of CFP® certification and access to a diverse, ethical and competent financial planning workforce. Widely recognized by firms and consumer groups as the standard for financial planning, CFP® certification is held by over 86,000 people in the United States.

OPPORTUNITY

The Managing Director, Marketing & Communications (MD, M&C) at the Certified Financial Planner Board of Standards, Inc. will lead the growth, marketing, advertising, and communications (profession facing as well as public facing) functions of the organization. This individual will ensure the departments' activities and performance facilitate achievement of organizational goals. The MD, M&C will act as strategic advisor and colleague to other functions and departments to unify direction and outcomes. The individual will be accountable for the development, communication and updating of the brand strategy in support of operations and strategic priorities and delivers agreed upon results.

ESSENTIAL FUNCTIONS

Brand Strategy

- Ensures the development and implementation of a research driven, evidence-based brand (business) strategy that supports and leverages core operations
- Collaborates and leads the development of brand promises/positioning and hierarchy of strategic messaging to support brand strategy and brand story
- Identifies, directs, and manages marketing, advertising and communications strategy aligned with CFP Board and CFP® certification brand
- Positions, manages, refines, and cultivates CFP Board brand through continuous monitoring and research related to stakeholder perceptions, trends, and advances in financial services
- Ensures all messages emanating from CFP Board are accurate, consistent, and present a coherent image of the organization
- Works across the organization to strengthen, adapt and develop segmentation, competitive analysis/ market intelligence, positioning to achieve organizational goals
- Regularly monitors business and competitive landscape to strengthen brand position within and beyond the profession of financial advice and financial planning
- Manages the development of innovative and inclusive communications, marketing, and public relations strategies utilizing traditional, digital, and social communication platforms aligned with brand

Marketing

- Develops the plans that result in the growth of the number of CFPs in the United States
- Directs and monitors direct (response) marketing activities and deliverables providing necessary guidance and feedback as needed

- Ensures consistent and metric driven delivery of tactical marketing plans to achieve organizational goals
- Leads development of all creative and content, in partnership with in-house staff and multiple partners
- Guarantees ongoing evaluation and reporting of the efficacy of marketing campaigns and performance of staff and external business partners
- Provides ongoing guidance and direction for CRM strategies including segmentation, competitive analysis/market intelligence, prospecting, lead generation, retention
- Leads and manages use of data collection, tracking, reporting and analysis to measure and report marketing results
- Facilitates stakeholder engagement and relationships

Advertising (Public Awareness Campaign)

- Increase brand equity metrics such as aided and unaided awareness of CFP certification.
- Leads and directs the data driven development and implementation of the public awareness campaign (PAC).
- Manages the staff activity and performance in the creative execution of the advertising and supporting media buy
- Ensures that consumer communication activities and deliverables support the PAC strategy and messaging
- Understands CFP Board's positioning vis-à-vis competitors and recommends active defensive and offensive strategies accordingly.
- Oversees the strategy and implementation of strategy for www.letsmakeaplan.org for content and functionality to facilitate positive user experience and media coverage
- Directs the collection, analysis and reporting of campaign performance including both primary and secondary data.
- Successfully responds to strategic communication needs on behalf of PAC.

Communications

- Manages internal and external communications staff, processes, and deliverables.
- Identifies potential crisis communications situations, creates potential responses, and maintains a strong crisis communications protocol and capability
- Oversees public relations strategy that gains positive exposure for the organization, and its programs and initiatives
- Provides strategic consulting to executive leadership on communications messaging and industry reputation management
- Oversees speech writing, blog drafts and twitter posts for the CEO
- Evaluates and improves internal and external communication outputs, including plans
- Designs and manages exceptional cpf.net (web) experience that includes functionality and dynamic and accurate content.
- Grow social media presence.

OTHER DUTIES

- Manages, supervises, and optimizes staff and their performance, including writing annual evaluations and ensuring staff training and development
- Leads the business negotiations with agency and other business partners.

- Oversees, evaluates, and updates department budgets and monitor compliance
- Acts as Strategic Advisor to members of the Executive Leadership Team
- Participates in and contributes to cross-functional working groups as required
- Oversees the day-to-day activities of marketing, advertising, and communications, including budgeting, planning, and coordination with key partners and stakeholders
- Performs other duties as assigned

BACKGROUND/SKILLS/ABILITIES

- Bachelor's degree in marketing or communications or related disciplines; advanced degree preferred.
- Background in financial services strongly desired
- Demonstrated experience and leadership in developing and implementing comprehensive brand strategy for communications, media relations, marketing, and websites
- Demonstrable profit and loss experience in two or more enterprises; for profit experience a plus
- Deep skills in marketing campaign development, execution and leveraging data and analytics to improve results and increase ROI
- Successful track record in developing and implementing a successful communications strategy, including media relations, crisis communications, social media, and digital strategy
- Exemplary verbal, presentation, and written communication skills, including the ability to communicate with precision and effectiveness across all levels and functions and ability to leverage those skills with other team members.
- Excellent implementation skills including the ability to set and achieve goals, prioritize, and manage multiple initiatives simultaneously
- Relationship builder with the flexibility and finesse to 'manage by influence'
- High energy, maturity, and leadership with the ability to serve as a unifying force at both the strategic and tactical levels
- Self-starter, able to work independently and entrepreneurially; enjoys creating and implementing new initiatives
- Robust analytical skills, with a data-driven approach to decision-making
- Budget management and strategic planning experience
- Consistently inspires confidence in knowledge, competencies, collaboration, and communication
- Strong self-awareness/high EQ skills

MEASURES OF SUCCESS/KPIs

- Increase brand equity
- Growing the number of CFPs in the United States
- Ensure high retention rate among current CFPs
- Increase earned media presence/visibility for the CFP Board and CFP certification
- Ensure that CFP Board's web sites (cfp.net and letsmakeaplan.org) are best in class in both content and functionality

DIGITAL PRESENCE

Web: www.cfp.net

Twitter: [@CFPBoard](https://twitter.com/CFPBoard)

Facebook: [@CertifiedFinancialPlannerBoardofStandards](https://www.facebook.com/CertifiedFinancialPlannerBoardofStandards)

Vetted Solutions is a Washington, D.C. based executive search firm specializing in association and nonprofit recruiting and consulting. We focus on CEO and senior staff positions.

For confidential consideration, please email your resume and cover letter to: CFPBOARDMDMCsearch@vettedolutions.com or call +1 202 544 4749.

VETTED SOLUTIONS

A PASSION
FOR PURPOSE

vettedolutions.com

Follow us on: [!\[\]\(8bba887393ca45b761e5cb49e755e762_img.jpg\)](#) [!\[\]\(b898b980f2d860cdb0237afbc3664529_img.jpg\)](#)

Partners in [Panorama](#) - Asia, Australia, EMEA, Latin America, North America

Members of the Association of Executive Search Consultants - [AESC](#)