

## Senior Marketing Specialist

The Certified Financial Planner Board of Standards (“CFP Board”) - headquartered in Washington, D.C.-is the certifying body for financial planning professionals. It is a non-profit organization that fosters professional standards in personal financial planning through its setting and enforcement of the education, examination, experience, ethics, and other requirements for the CFP certification.

This position normally operates in a professional office environment. However, remote work may take place due to COVID-19 and any other pandemic or for any reason as determined by CFP Board’s CEO.

### General Function:

CFP Board seeks a highly motivated Communications Specialist who will analyze quantitative data to make insightful, data-driven recommendations that optimize marketing effectiveness and business performance. The ideal candidate will embrace open collaboration, possess intellectual curiosity, and help the organization deliver results towards fulfilling our mission.

### Essential Functions

- Partners with Marketing Manager to develop and present annual cross-team marketing plan for optimizing conversions of certification candidates to certified professionals
- Supports acquisition, renewal, and reinstatement programs
- Collaborates with the Marketing Manager to help create and promote new candidate engagement programs and monitor and evolve success of current engagement programs
- Manages marketing efforts to increase enrollment in the Candidate Referral Program, analyzes results, and distributes results reports among cross-functional teams
- Manager in monitoring posts and monthly reporting on impact from forum engagement
- Updates dashboards for all marketing programs, providing insights to other team members to enhance programs
- Writes and executes direct mail and email communications for Candidate Advocate program, including pulling lists, sending emails, and working with mailing vendor
- Creates annual marketing plan for increasing usage of digital certificates to increase CFP® certification brand awareness
- Manages annual practice exam marketing plan
- Writes and presents concept documents for assigned direct response fundraising campaigns, executes the campaigns, and analyzes and reports on campaign results with recommendations for improvement
- Manages the online store and related product sales and budgets; creates and manages annual marketing plan for increasing sales
- Pulls relevant data from AMS and other data sources as necessary for individual analysis requests

- Audits current reporting and provides recommendations for enhancements necessary to better track impact
- Updates and further develops necessary variations of monthly growth prediction model
- Supports Marketing, Education, and Corporate Relations team's registered programs and firm initiatives including data transfers, discounts/offer tracking, and direct response projects as assigned
- Coordinates with external partner organizations on data matching, reporting on key metrics, and sharing information with relevant internal stakeholders
- Serves as lead trainer for use of marketing email platform
- Performs other duties as assigned

### **Background/Skills/Abilities Preferred**

- Bachelor's degree in business, marketing, or other related discipline
- Minimum five years of experience with marketing planning, execution, and analytics experience
- Exceptionally strong analytical skills, with an ability to translate data into actionable insights.
- Strong collaboration skills to work with a variety of internal constituencies, develop partner relationships and rapport, and influence thinking
- Expert knowledge in Microsoft Office
- Intermediate to expert level administrator in email marketing tools; Informz preferred
- Beginner to intermediate user of Business Intelligence tools, Tableau preferred
- Familiarity with SQL
- Understand best practices around website analytics
- Excellent oral and written communication skills
- Able to organize multiple tasks and develop realistic actions plans while being sensitive to time constraints and resource availability
- Ability to execute email, direct mail, and telephone campaigns internally and with partner vendors
- Strong initiative, drive, and attention to detail
- Effective project management skills

To apply, send your resume and one-page letter summarizing your interest, qualifications, and salary expectations. Please reference the Senior Marketing Specialist position in your cover letter. Email your application to [humanresources@cfpboard.org](mailto:humanresources@cfpboard.org), Attention: Director, Human Resources, CFP Board, 1425 K Street NW, Suite 800, Washington, DC 20005.

CFP Board believes that diversity of experience and perspective are strengths and seeks to continue to grow a highly committed, skilled, and collaborative staff.