

### **Director, Public Awareness Campaign (PAC)**

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 professional who will be responsible for programs that achieve CFP® brand awareness and other brand equity metrics among target audiences. The programs include a multi-million advertising campaign, consumer public relations and communications, consumer facing website (Letsmakeaplan.org) and the essential research (primary, secondary, and competitive) and analytics to support the public awareness campaign goals and performance. Working cross-functionally and in close collaboration with agency partners, this role will champion the strategy, planning, and execution for the CFP® certification and CFP Board brands’ messaging as well as creative treatment across all awareness marketing and communications vehicles and deliverables. The Director is the brand steward ensuring awareness, familiarity, and preference for CFP® certification as the standard of excellence in competent and ethical financial planning.

#### **Essential Functions**

- Develop/improve, plan, and implement the public awareness campaign and its programs to achieve stated organizational goals.
- Manage advertising agency to create, test and implement annual advertising campaign within budget and schedule.
- Evaluate agency performance and provide recommendations for improvement and other courses of action.
- Oversee communication activities that support and complement the advertising campaign and ongoing consumer awareness of CFP® certification.
- Evaluate and edit consumer content for Letsmakeaplan.org, consumer placed articles and press releases to ensure brand messaging and positioning.
- Direct the design, content, functionality, and outcomes of Letsmakeaplan.org, ensuring accuracy and timeliness of content and positive user experience.
- Leverage consumer insights and research to drive creative development, placement, and positioning.
- Identify secondary research data and manage primary marketing research programs that advance and support advertising strategy.
- Pursue and synthesize research and analytic insights to track performance, solve business problems and, as appropriate, recommend courses of actions to achieve goals.

- Implement ongoing consumer and/or user testing of programs (advertising, communications, website) as appropriate.
- Present qualitative and quantitative data in a meaningful, audience relevant manner.
- Conduct competitive analysis of CFP® certification mind share and positioning annually and provide recommendations for improvements, if any.
- Adopt ongoing evaluation and analysis of activities and outcomes and provide accurate, insightful information to executives.
- Ensure the delivery of quality, high impact programs in advertising, communications, and Letsmakeaplan.org that elevate awareness, preference, and intent to use of financial professionals who hold the CFP® certification.
- Prepare, write and edit executive communications and presentations related to the campaign.
- Maintain and enhance organization's brand guidelines.
- Ensure budget and schedule compliance and provide regular briefings.
- Support staff by offering a consistent perspective on our brand.
- Drive the internal process of approvals and coordinate the logistics of campaign launches.
- Collaborate with teams across the organization including Legal/Compliance and Finance for contract negotiations and agency Scope of Work (SOW) implementation.
- Work with marketing and communications colleagues and core business teams to translate short and long-term goals into successful creative across all channels – offline and online.
- Perform other duties as assigned.

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

- Bachelor's degree in Marketing, Advertising, Business, or related field; master's degree a plus.
- 7+ years of marketing experience in advertising or brand management including corporate and/or agency experience.
- Demonstrated expertise in functional roles successfully leading large scale multi-million strategic campaigns.
- Business acumen and corporate maturity essential.
- Experience creating integrated campaigns across multiple media types and understand media strategy and how creative can be effective across varying media channels.
- Strong analytical skills, comfortable reviewing and analyzing performance metrics and ability to pivot according to data insights.
- Excellent presentation, written and verbal communication skills.
- Aptitude for problem-solving, consensus-building, and inspiring others to achieve great work.
- Highly organized and detail-oriented; must possess ability to work independently and be a self-starter.
- Ability to oversee, interpret and utilize effective market research.
- Experience developing positive and productive agency and vendor relationships.
- Ability to adapt to changes quickly, agility in strategic thinking and tactical implementation.
- Demonstrated ability to think strategically and creatively.
- Flair for negotiating, persuading, and networking.
- Background in consumer financial services a plus.
- Proficient with all standard office software; including PowerPoint presentation skills.

# CFP BOARD

CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

To apply, send your resume and one-page letter summarizing your interest, qualifications, and salary expectations. Please reference the Director, PAC position in your cover letter. Email your application to [humanresources@cfpboard.org](mailto:humanresources@cfpboard.org), Attention: 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.