

## Marketing Manager - Job Description

Team: Business Development and Marketing

Reporting to: BD and Marketing Consultant

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### About Us

We are an independent and privately- owned family office services provider, based in Jersey and supporting clients all over the world. Since opening our doors in 2013 we've brought a fresh approach to our market, through our progressive, flexible, and service-focused offer.

Our firm's culture is shaped by our three central values. The **integrity** consistently to do what is right, maintaining and enhancing our clients' trust. The **professionalism** confidently to deliver expert guidance, rooted in a truly independent approach. And the **agility** to think and act at a pace that mirrors events in an increasingly complex and dynamic world.

Following strong and sustained growth, and receipt of an array of industry accolades, we're now adding to our team. We are looking for talented and dedicated colleagues who will thrive in an environment where their voice, and their contribution will be invited, heard, and appreciated.

### The Role

As part of our Business Development and Marketing team, you will drive the creation, implementation and execution of the marketing and communications strategy for Crestbridge Family Office Services (CFOS) and our joint venture in the US, Crestbridge Fiduciary (CBF). You will be responsible for ensuring that the CFOS and CBF brands and reputations are correctly and accurately represented across each of the marketing channels used to promote the organisation. In addition you will be responsible for our digital marketing, external communications and all related activities to support our business objectives and drive revenue and client growth.

### Key Result Areas

- Implement and execute the marketing and communications strategy and plan, ensuring value is created and measured and always with a focus on business growth.
- Lead the execution of marketing campaigns and promotional events from start to finish, leveraging internal support and driving collaboration.
- Successful delivery of internal and external events to meet agreed objectives, in line with budget.
- Ensure excellent marketing support is provided to all internal and external stakeholders in line with Crestbridge standards, procedures and guidelines.
- Take responsibility for your personal development, in line with agreed performance objectives and development plans.
- Be a role model and ambassador for Crestbridge Family Office Services, always acting in accordance with our core values.

## Key Responsibilities

The list below details the tasks that your role is likely to include. It is not exhaustive and may be amended from time to time:

### Marketing Management

- Identify target audiences and develop marketing plans with objectives across the different marketing channels.
- Implement relevant marketing tactics that will enable the objectives to be achieved, positioning Crestbridge as a key provider within the relevant market.
- Identify effectiveness and impact of current marketing initiatives using analysis and measures to optimise future marketing activities and understand return on investment.
- Measure and report on ROI of all marketing activities to always ensure alignment to delivering business growth and make recommendations to the board and other key stakeholders to maximise value.
- Develop strong relationships with internal and external stakeholders to achieve high levels of trust and professionalism to support the above.
- Communicate with senior management and Directors about the marketing strategy and activities.
- Prepare the annual marketing budget and manage the spend within agreed budgets.
- Create and maintain marketing policies and procedures.
- Lead the production of Crestbridge marketing materials where required, both physical and digital.
- Lead the production of all marketing collateral including brochures, flyers, event invitations, briefings etc.
- Creation of 'Hallmark days' designs with the agency and the team.
- Responsible for sourcing of all merchandise.
- Mentor and manage other team members with branded communications, promotional items and corporate documents.
- Preparation of the board report.
- Analyse client insights, market analysis and marketing best practices to help build successful strategies and plans.

### Digital

- Drive the Crestbridge marketing and communications strategies by building, planning and implementing an overall digital marketing strategy.
- Help deliver creative briefs and guide creative direction to meet objectives.
- Manage and oversee all the Crestbridge social media accounts, managing all digital marketing channels to agreed budgets and KPIs.
- Generation of ideas for LinkedIn posts for Crestbridge Family Office Services (CFOS) and Crestbridge Fiduciary (CBF).
- Develop and manage the website and follow up on lead generation online form submissions.
- Identify website development partners and hold regular updates with appointed partners.
- Manage and review all content on website and identify opportunities for development e.g. SEO.
- Identify collaboration opportunities for podcasts with media partners and support content / ideas for campaigns, work with fee earners and video partner and provide art direction.
- Help drive best practice across Crestbridge regarding social media, acting as an ambassador for the channels by promoting and delivering training.
- Responsible for art direct photographs and the review and updating of the library.
- When producing digital and physical communications on behalf of Crestbridge, ensure that all items are passed through the company 4-eyes policy to ensure accuracy, attention to detail and consistency of tone, content and corporate personality.

### Design/ Branding

- Work with the design agency including on campaign ideas /general design etc.
- Liaison with the design agency to produce all artwork.
- Responsible for the review of brand guidelines and always ensuring adherence to them when undertaking any internal or external marketing activity.

- Act as a brand guardian monitoring usage of corporate branding and values and supporting others in correctly adhering to the requirements.
- Responsible for the creation and review of all marketing templates.

#### **Public Relations and Communications**

- Generation of news and features.
- Actively participate in bi-weekly meetings with the PR agency for market intelligence, content and ideas.
- Liaison with the media and identification of opportunities to increase profile.

#### **Event Management**

- Using the events planner, plan and coordinate relevant events including seminars, conferences, Business Development intermediary events and client entertainment.
- Lead the events process, to include understanding the positioning and impact and anticipating and proactively managing the needs of the business.
- Manage key stakeholders' expectations and input through the event planning process ensuring they are kept up to date with progress and fully briefed at each stage of the process.
- Plan and execute all other related elements of the marketing mix required for each event to include working with Directors to create relevant, targeted invite / attendee lists for each event. Coordinate the pre and post event mailing processes for each event including invitations, reminders, follow ups and declines. Monitor all responses, including the coordination of invites and CRM updates (in conjunction with the CRM manager) ensuring that the GDPR process is always followed through the event planning process.
- Oversee corporate collateral, signage, merchandise and all digital elements using InDesign or liaising with creative agencies as required.
- Coordinate all suppliers for each event, liaising with them to ensure any catering, venue and AV requirements are finalised.
- Provide detailed post event analysis and reporting, to include return on investment, attendee numbers and benchmarking of other key metrics.

#### **Leadership and Management**

- Act as a role model to implement a culture in your team which supports the company values and delivers excellent client service, operational effectiveness, and efficiencies.
- Develop commitment from your team through recognising good performance, providing timely and constructive feedback and leading by example.
- Ensure team members have plans in place to support their development, receive relevant training and that all CPD requirements for you and your team are met.
- In conjunction with the Head of Function, identify talent, develop high-potential team members, and manage underperformance within the team.
- Deliver effective and timely communication with your team, clients, stakeholders and colleagues.
- Actively lead the management of meetings with other areas of the business together with all aspects of team actions in respect of marketing, financial and operational initiatives and projects.
- Deputise in the absence of the Head of Function when required.

## General

- Demonstrate and be recognised for technical excellence in your specialist area and be able to provide sound, quality and technical guidance to other colleagues and stakeholders.
- Identify opportunities, develop contacts and oversee the implementation of sponsorship initiatives.
- Play a key role in the identification and delivery of business requirements in relation to Corporate Social Responsibility (CSR).
- Provide Business Development support in the absence of the BD Support Manager.
- Administer the awards calendar, identifying and creating all award submissions for Crestbridge and individual team members.
- Develop and maintain a strong personal network of industry peers and external contacts.
- Proactively keep up to date with industry developments and knowledge of financial and marketing products and services.
- Identify efficiencies and suggest new products and systems as appropriate.
- Manage workload and prioritise effectively.

## Requirements

### Qualifications

- A good academic background, educated to a minimum of A levels (or equivalent).
- A degree in marketing/business, or CIM diploma level qualification.

### Knowledge and Experience

- Minimum of 6 years' experience working in a marketing role in a professional services firm.
- Experience in creating and executing marketing strategies to drive growth.
- Demonstrable experience in managing campaigns, leading on all areas of delivery.
- Experience of working closely and building strong relationships with senior management including Directors.
- Knowledge of CRM, Web CMS and other marketing related software.
- Strong market knowledge with a network of relevant industry connections.

### Skills and Qualities

- Excellent written and verbal communication skills with the ability to communicate effectively and professionally with stakeholders at all levels.
- Excellent attention to detail and the highest levels of accuracy.
- Ability to meet deadlines and proactively manage expectations.
- Ability to initiate ideas, independently create content and deliver autonomously.
- High degree of accuracy and attention to detail.
- Good influencing and negotiation skills with the ability to negotiate with suppliers and providers to maximise budget and opportunities.
- An understanding of research, analysis and reporting methodology.
- A proactive and flexible approach driven by a commercial and growth mindset.
- Ability to think laterally and problem solve.
- An engaging manager with the ability to inspire, motivate and develop others.
- Ability to stay up to date with the latest industry trends, developments, tools and technologies.
- Strong project management, multitasking and decision-making skills.

## Additional Information

### Our Core Values

Our team share and demonstrate the following behaviours which align to our values:

**Integrity** – kind, trustworthy and compassionate, working collaboratively and respectfully with colleagues, clients and other stakeholders.

**Professionalism** - reliable and accurate, working consistently to deliver solutions efficiently, effectively and with a level of technical expertise appropriate to your experience.

**Agility** - flexible and commercial, happy to adapt to changing demands and offer support wherever required to meet the needs of the business.

We offer all our permanent team members a great benefits package that includes\*:

- Competitive salary
- Non-contributory pension scheme
- Private healthcare (with no exclusions for pre-existing conditions)
- Life insurance
- Critical illness cover
- Option to buy or sell up to 5 extra days of annual leave
- 3 additional wellbeing days a year
- Discretionary annual bonus
- Support for professional qualifications and ongoing development

*\*Eligibility for certain benefits will commence after completion of probation. Crestbridge reserves the right to vary or withdraw benefits at any time.*