

## Position Description

**Job Title:** Member Engagement Coordinator (New Zealand)

**Employment Type:** Part-time (15 hours per week)

**Location:** Auckland

**Reports to:** New Zealand Manager

The Relationship Manager plays a key role in supporting the sustainable growth and engagement of Family Business Association New Zealand (FBA NZ). Reporting to the New Zealand Manager, the role is primarily focused on relationship-led business development, member acquisition and retention, and delivering a consistently high-quality member experience.

The role is weighted towards business development and engagement (approximately 80%), with a focus on member growth from July to December and retention and engagement from January to June. The role also provides support across events, communications, and partnerships, working closely with the New Zealand Manager and the wider national FBA team.

### Key Focus Areas

- Business development, member growth and engagement (approx. 80%)
- Event coordination and delivery support (approx. 15%)
- Partnership and stakeholder support (approx. 5%)

### Key Relationships

- New Zealand Manager
- CEO and Australian-based national FBA team
- Family Business Members and Advisor Members

## Key Responsibilities

### Business Development & Member Growth

- Support the New Zealand Manager to achieve annual new member acquisition targets and maintain a minimum member retention rate of 85%.
- Build and maintain an active pipeline of prospective family business and advisor members.
- Proactively follow up leads, referrals, and enquiries, ensuring timely and professional engagement.
- Receive incoming membership enquiries and provide accurate information on FBA membership and programs.
- Maintain accurate and up-to-date records in the CRM, including pipeline management and reporting.
- Provide weekly updates to the New Zealand Manager on membership performance, pipeline activity, and opportunities.
- Represent FBA NZ at approved events and meetings to support member acquisition and relationship building.

## **Member Engagement & Experience**

- Build and maintain strong, trusted relationships with members, ensuring a positive and consistent member experience.
- Actively engage with members to understand their needs and connect them with relevant FBA programs, events, and opportunities.
- Support member retention through regular contact, relationship management, and personalised engagement.

## **Events & Engagement Activities**

- Support the planning, coordination, and delivery of New Zealand-based events and engagement activities, including Coffee Connect and Meet the Owner events.
- Assist with event scheduling, registrations, communications, and follow-up.
- Provide regular updates on event progress, attendance, and feedback.
- Provide administrative and coordination support for the annual National Insights Conference held in Auckland.

## **Promotion of FBA Programs**

- Actively promote FBA programs and initiatives to prospective and current members, including:
  - Education programs
  - New Zealand and Asia Pacific Conferences
  - Forum Group Program
- Ensure members are informed of relevant engagement opportunities, updates, and key dates.

## **Communications & Content Support**

- Assist with sourcing member stories and content for social media and the New Zealand e-newsletter.
- Support accurate and timely communication with members in collaboration with the national team.

## **Partnerships & Stakeholder Engagement**

- Attend approved external events and activities that support the profile, reach, and growth of FBA NZ.

## **Other Duties**

- Participate in weekly/fortnightly one-on-one meetings with the New Zealand Manager.
- Attend monthly state or national team meetings as required.
- Submit a monthly activity plan in advance, outlining priorities, pipeline activity, and key engagement actions.

## Skills and Experience

### Experience

- Proven experience in business development, membership growth, sales, or relationship management.
- Experience building and maintaining strong client or stakeholder relationships.
- Experience supporting or coordinating events and engagement activities.
- Experience using CRM systems and developing pipelines and reporting.
- Demonstrated ability to work independently and remotely while remaining connected to a broader team.

### Skills

- Strong interpersonal and relationship-building.
- Clear, confident communication.
- Organised and able to manage multiple priorities effectively.
- Strong attention to detail and follow-through.
- Self-motivated, proactive, and comfortable working autonomously.
- Good digital literacy, including CRM systems, Microsoft Office, and online meeting tools (e.g. Teams, Zoom).

### Qualifications

- Relevant tertiary qualification in business, marketing, communications, or a related field, or equivalent practical experience.

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## Performance Expectations

In conjunction with the New Zealand Manager:

- Achieve or exceed new member acquisition targets as outlined in the annual business plan.
- Maintain a minimum member retention rate of 85%.
- Maintain an active and well-managed pipeline of prospective members.
- Contribute to the successful delivery of New Zealand events with strong attendance and positive member feedback.
- Demonstrate behaviours aligned with FBA values in all interactions.

## Our Values

FBA has a set of values by which it is expected we all embrace:

### **One FAMILY**

Everyone involved with FBA belongs to our community. We show care, empathy, and respect. We have each other's backs and treat others how we like to be treated. We speak with one voice.

### **Support members to THRIVE**

Everything we do is to purposely nourish and support our members and their families to thrive. We are responsive and proactive.

### **Be AUTHENTIC**

We are honest, genuine and true to our word.

### **A LEARNING mindset**

We lead with learning across the whole organisation to support our members meet their challenges effectively.