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| **Position Description: Chief Operating Officer** | |
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| **Title** | Chief Operating Officer |
| **Reports To** | Chief Executive |
| **Location** | 57 Kilmore Street, Christchurch |
| **Date Completed** | June 2025 |
| **Internal Relationships** | Chief Executive, Finance Manager, Business Services Manager, Head of Advocacy & Strategy, Executive Assistant. |
| **External Relationships** | Members, Customers, Board, BusinessNZ and Network, NZ Chambers of Commerce & Industry, key local stakeholders, partners, strategic relationships, member benefit providers, Government agencies, key local stakeholders. |
| **Direct Reports** | Business Services Manager, Finance Manager, Business Advisor, Digital Analyst & Support Coordinator, Receptionist/Export Documentation Advisor, Accounts & Payroll Specialist, Partnership and Project Support, Sales Account Managers, Brand and Engagement Specialist, Marketing/Sustainability Specialist, Marketing and Communications Coordinator. |
| **Purpose of the Chief Operating Officer Position** | | |
| **Background**  With Executive responsibilities, this role will support the Chief Executive and provide operational leadership to the Leadership team with a focus on the operational excellence and service delivery, commercial performance and a high performing culture across the organisation. The COO will drive strategic financial management and stewardship, ensuring robust partnerships and strategic relationships that enhance value delivery to members, while maintaining long-term financial sustainability.  This will include ensuring we have:   * A strong value proposition that is agile to respond to our members and customers changing needs * Strategic financial leadership that drives commercial outcomes and sustainable growth * Strategic partnerships and relationships in place to help us achieve our purpose and drive growth * Robust systems and processes for our digital and IT infrastructure * A focus on leading continuous improvement and change management * A high performing culture   Business Canterbury is carbon Zero Toitu accredited as part of a Business NZ initiative and commitment and this role oversees our accreditation across the organisation.  **Position Objectives**  The successful delivery of the annual operational plan and execution against the strategy including embedding of strategic projects outcomes and ongoing continuous improvement. This will include having robust systems and processes for:   * **Strategic Financial Leadership**: Leading comprehensive financial strategy, planning, and stewardship to ensure optimal resource allocation, revenue growth, and long-term financial sustainability that enables value delivery to members * **Partnership & Strategic Relationship Excellence**: Identifying, developing, and managing strategic partnerships and relationships that drive member value, commercial opportunities, and organisational growth * **Operational Excellence**: Our Strategy and Operational Plan process is well defined and produces an ambitious Strategy, Operational Plan and KPIs to monitor and track both individual and organisational performance * **Organisation Resilience**: Through business continuity planning, policies and processes alongside risk assessment and management * **Organisational Capability**: Our Operating model is fit for purpose and enables the delivery against our annual Strategy and Operational Plan * **People and Culture Strategy**: Which will shape an environment where our team feel supported through change, are thriving, are innovative and perform at their best with a focus on:   + Our leaders are empowered and supported through building their capability to lead within a changing organisational context   + Our people are accountable for their delivery and know what is expected from them * **Digital Infrastructure:** Our IT, digital infrastructure alongside our facility enables the team to operate at their very best and provide exceptional customer experience * **Process Excellence:** Our processes are clear, simple and encourage a growth mind set across our work * **Drive brand visibility and service accessibility:** Through strategic marketing, communications, and collaborative sales efforts to support growth. * **Commercial Success**: Our financial targets and commercial outcomes are exceeded ensuring our long-term financial sustainability and enhanced member value delivery.   **The Role will include the Following Areas of Responsibility**   * Strategic Financial Leadership * Partnerships & Strategic Relationships * Strategy Execution * Digital Governance * People and Culture * Business Development * Organisation Resilience * Oversight and Leadership of the following functions:   + Marketing and Communications   + Sales and Account Management   + Canterbury Trusted   + Reception and Export Documentation   + Facilities Management   + Sustainability * Strategic Projects | | |
| **Key Areas of Responsibility** | |
| You are responsible for delivering on the following key accountabilities for this role. Key performance indicators (KPIs) which will be discussed and agreed with you upon commencement.  **Strategic Financial Leadership**   * Financial Strategy Development: Lead the development and execution of comprehensive financial strategy that aligns with organisational objectives and drives sustainable growth * Advanced Financial Planning & Analysis: Develop sophisticated financial models, forecasting, and scenario planning to inform strategic decision-making and resource allocation * Revenue Strategy & Commercial Leadership: Drive revenue diversification strategies, pricing optimisation, and commercial performance across all business lines * Investment & Capital Allocation: Lead investment decisions, capital allocation strategies, and ROI analysis for strategic initiatives and partnerships * Financial Risk Management: Develop and implement comprehensive financial risk management frameworks, including cash flow management, financial controls, and mitigation strategies * Strategic Budget Leadership: Lead the strategic development of annual budgets working with the Finance Manager, ensuring alignment with strategic objectives and optimal resource allocation * Financial Performance Management: Establish advanced financial KPIs, dashboards, and reporting systems that provide real-time insights into financial performance and commercial opportunities * Cost Management & Efficiency: Drive operational efficiency initiatives, cost optimisation strategies, and productivity improvements across the organisation * Stakeholder Financial Communication: Present financial strategies, performance, and recommendations to the Board, CEO, and key stakeholders * Financial Systems & Process Excellence: Oversee the evolution of financial systems, processes, and capabilities to support organisational growth and strategic objectives.   **Partnerships & Strategic Relationships**   * Strategic Partnership Development: Identify, evaluate, negotiate, and secure strategic partnerships that enhance organisational capabilities, member value, and commercial opportunities * Partnership Strategy & Portfolio Management: Develop and execute comprehensive partnership strategies aligned with Business Canterbury's mission and strategic objectives * Strategic Relationship Management: Build and maintain high-value relationships with key stakeholders, industry leaders, and strategic partners that drive organisational growth and success * Partnership Commercial Framework: Ensure all partnerships deliver appropriate ROI and align with strategic and financial objectives through robust commercial frameworks * Partnership Integration & Execution: Develop and oversee execution plans for strategic partnerships, working with Leadership teams to maximise value realisation * Relationship Governance: Establish governance frameworks for strategic partnerships and relationships, including performance monitoring, review processes, and continuous improvement * Stakeholder Engagement: Represent Business Canterbury with key strategic stakeholder groups, members, and networks as required * Partnership Innovation: Identify emerging partnership opportunities and innovative relationship models that advance organisational objectives.   **Strategy Execution**   * Facilitate the process and coordinate the development and delivery of the annual Strategy and Operational Plan * Work with Leaders to develop functional strategies that underpin the organisation's Strategy and feed into the Operational Plan:   + Commercial and Financial Strategy   + Strategic Partnerships & Relationships   + Work Programme   + Marketing and Communications   + Advocacy   + People and Culture   + Digital Governance   + Sustainability * Work with Leaders on the development and execution of KPIs for our Strategy, operational delivery and individual team members * Coordinate reporting against the strategy and operational plan for the CE and Board * Lead the development and implementation of the Operational Plan working with the Leadership Team ensuring input, engagement and buy in from the whole Team * Develop and monitor dashboards on key metrics * Monitor, track progress and report variances against the Strategy and Operational Plan including leading actions as required.   **Digital Governance**   * Lead our Digital Strategy and Digital Governance to ensure we are evaluating emerging technologies to inform our digital strategy * Develop and manage the digital budget * Manage stakeholder relationships * Oversight of the overall digital/technology architecture * Lead and review our Technology and Digital Roadmap management and implementation building into future strategies and budget * Define key performance indicators (KPIs) to measure the success of digital initiatives * Regularly report progress and performance metrics.   **People and Culture**   * Oversee the development and annual update of our People and Culture Strategy which includes a focus on the following components working alongside the Leadership team:   + Accountabilities including organisational and individual KPIs   + Professional development plans in place as required for all team members * Organisation wide professional development initiatives that support continuous improvement and shifts in our ways of working * Ensure our values are brought to life across the organisation * Oversee change management across the team * Conduct team surveys to measure team engagement and continuous improvement * Our Operating model is supported by documentation including but not limited to:   + Delegated authorities across Leadership   + Management and operating processes   + Organisation structure * Have robust HR systems and processes for recruitment, induction and retention * Ensure all HR practices meet employment law requirements, and the organisation adopts best practice * Ensure Health and Safety is an integral part of our organisation protecting the wellbeing of our people including but not limited to having an EAP in place * Ensure all organisation policies are up-to-date and reflect best practice.   **Business Development**   * Identify opportunities for Business Canterbury to extend their reach and add value to the organisation, our members, and customers through partnerships with key stakeholders * Manage key business partners for specialist expertise including ensuring we have documented service level agreements in place that are providing the support required including but not limited to IT, Digital, Sustainability and EAP * Represent and present on behalf of Business Canterbury with key strategic stakeholder groups, members and networks as required.   Organisational Resilience   * Ensure organisational policies are regularly reviewed, updated, and aligned with legal, regulatory, and strategic requirements * Develop and maintain a risk management framework that identifies, assesses, and mitigates strategic, operational, financial, and reputational risks * Ensure business continuity planning is in place and regularly reviewed.   **Marketing & Communications**   * Oversee the smooth operation and delivery of our marketing and communications through: * The development and delivery of an annual marketing & communications strategy including the annual marketing plan and budget to drive membership growth, retention and customer engagement * Leading the Marketing/Communications roles to work across the organisation utilising data and technology to develop and implement targeted strategies to raise brand awareness, grow membership and increase customer engagement in our services, trainings and events * Ensuring content across all platforms aligns with the organisation’s brand in look, tone and quality * Measuring and reporting on the effectiveness of marketing activity against key objectives * Monitoring our competitor landscape * Ensuring our full work programme are reflected across all of marketing and communication platforms including our website.   **Sales and Account Management**   * + To oversee the Sales Account management function to drive commercial growth across the business through:     - * Providing team leadership to achieve the set targets for sales and revenue growth across membership acquisition and retention and member and customer engagement across services.   + Provide regular Member and Customer reporting as required, identifying trends and providing commentary to support   + Reporting variances and putting in place actions to address   + Account Management as required across specific parts of our membership and partnerships.   **Canterbury Trusted**   * Oversee the smooth delivery and evolution of Canterbury Trusted which includes:   + Managing the end-to-end process for Canterbury Trusted applications ensuring processes and systems are in place and adhered to for onboarding, renewal, reporting and monitoring, lead tracking, engagement etc   + Provide leadership to the Sales Account Managers to meet sales targets and retention   + Value proposition evolution and product expansion   + Process enhancement and improvement.   **Reception and Export Documentation**   * Oversee the smooth operation and resourcing of:   + Frontline reception ensuring exceptional customer experience   + Export documentation services including monthly billing and monitoring variances   + Through the Export Documentation Advisor ensure we are meeting our compliance requirements and keeping our systems, processes and signatories up to date.   **Facilities Management**   * Oversee the facilities management alongside the Executive Assistant to manage and maintain office facilities and equipment including but not limited to:   + Cleaning contract   + Air conditioning maintenance contract   + Vehicle fleet (in association with the Finance Manager)   + Ensuring furniture and fittings remain in good order and are replaced as appropriate and in line with budget, working with the Finance Manager   + Monitoring warranty status of facilities and ensuring that this is accessed as appropriate * Ensure all building compliance requirements are met and are up to date * Management of access and security to the building * Responsibility for managing and maintaining of internal rooms including cleaning and servicing of equipment and ground maintenance * Providing full and accurate information for the annual Budget for our facilities and ongoing maintenance.   **Sustainability**   * Oversee our Toitu accreditation and the work required to meet our obligations including:   + Integration of sustainable practices within Business Canterbury's business practices including procurement across the team.   **Strategic Projects**   * Oversee strategic projects ensuring a clear Project Scope, Plan and Budget allocation and an evaluation post delivery * Monitor, track progress and report any monthly variances or at-risk components * Work with Leaders to embed outcomes of strategic projects into future strategy, operational plans, and lead change management as required.   **General**   * Support the CEO with Board reporting, strategic papers and meetings * Any other duties that may arise as the position develops * Promote and actively encourage membership growth through identifying and actioning membership acquisition and retention opportunities * Actively participate in:   + Team meetings   + Annual business planning process   + Staff engagement surveys   + Professional development   + Identifying and acting on opportunities that support our strategy   + Operate within the agreed Strategy/Operational Business Plan and Budget.   **Corporate Responsibility**   * Create and maintain information and appropriate Business Canterbury management systems * Promote a positive and professional image of Business Canterbury at all times * Represent Business Canterbury as appropriate * Engage in appropriate stakeholder liaison * Understand and implement Business Canterbury values of Lead the Change and the Charge; Be the Best Business Partner; Fiercely Focussed on what's best for our Customers; Commercially Driven for impact and Authenticity matters * Ensure you understand and adhere to all Business Canterbury Policies including the Health and Safety Policy, which involves actively contributing towards Business Canterbury's commitment to the safety and wellbeing of our fellow staff and our members at all times. | |

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| **Key Competencies/Knowledge/Skills and Experience** | | | | |
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|  |  | **Required** | **Desirable** |  |
|  | Minimum of 7 years’ experience operating at an executive level including in an operational/general management capacity | ü |  |  |
|  | Minimum of 5 years proven experience in strategic financial management, including financial strategy development, advanced financial analysis, and commercial leadership | ü |  |  |
|  | Minimum of 5 years’ experience in developing and managing strategic partnerships and high-value stakeholder relationships | ü |  |  |
|  | Previous experience in successfully leading and executing organisation change with strong people leadership skills | ü |  |  |
|  | Excellent oral and written communication skills with the ability to articulate the vision of strategic projects and financial strategies | ü |  |  |
|  | Strong business and financial acumen Including financial modelling, investment analysis, revenue strategy, and commercial decision-making | ü |  |  |
|  | Previous experience in overseeing digital transformation including process and methodology | ü |  |  |
|  | The ability to operate at a strategic and implementation level using critical thinking | ü |  |  |
|  | Strong and proven project management and risk management experience | ü |  |  |
|  | Previous experience in research, insights and analysis | ü |  |  |
|  | HR and ER knowledge and experience including building and maintaining a strong team culture | ü |  |  |
|  | A strong customer service ethic with the ability to see and act on trends in business evolution | ü |  |  |
|  | A good understanding of the key drivers of business success | ü |  |  |
|  | Ability to set up robust systems and processes and embed across organisations | ü |  |  |
|  | The ability to communicate clearly both in writing and verbally with internal and external audiences | ü |  |  |
|  | Professional accounting or finance qualifications (CA, CPA, CFA, MBA Finance) |  | ü |  |
|  | Proven track record in corporate sponsorship negotiations, strategic alliance development, and relationship management | ü |  |  |
|  | Experience in revenue diversification, pricing strategy, and commercial optimisation |  | ü |  |
|  | Digital business evolution and transition |  | ü |  |
|  | Experience in membership-based organisations |  | ü |  |
|  | Strong Stakeholder engagement including working with local and central government |  | ü |  |
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| **Personal Attributes** | | | |
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|  | **Personal Attributes** | **Characterised by** |  |
|  | **Strategic & Financial Leadership** | * Making strategy and financial stewardship a priority for our business * Advanced financial thinking and commercial acumen * Agility in decision making with strong analytical foundation * Being purposeful and deliberate in the way you prioritise activity * Strong focus on continuous improvement and ensuring we are moving with the market and adapting for the future * Make sound strategic leadership decisions with financial rigour * Strategic insight and agility partnership development * Ensuring buy in from the team * Providing clarity and avoiding unnecessary complexity (systems, processes and information) |  |
|  | **Organisation centric** | * Acts with integrity putting the organisation at the centre of decision making * As part of the Executive, focuses on the whole of the organisation’s performance not just functional responsibilities * Seeks continuous improvement for the organisation and our customers |  |
|  | **Leadership influence** | * Creating clarity out of confusion * Calm out of chaos * Develops the capability for others to solve problems * Strong team engagement and ability to influence outcomes * Demonstrates empathy, high awareness of self and others * Able to lead others through change providing support while introducing and implementing new ways of working and operating * The ability to instil a sense of agency and urgency across the team * Role models desirable behaviours and encourages others to do the same * The ability to motivate and influence others * Knows when to empower others and not get involved in the detail |  |
|  | **Curiosity** | * Asks questions and seeks others’ input * Explores ideas, reads widely, and talks with others to understand the business landscape more deeply * Self-driven and motivated * Thinks outside the box, always looking for new and improved ways of operating * Challenges own thinking and the team to try new things and explore opportunities |  |
|  | **Ability to set and meet targets** | * Works to achieve outcomes within project timeframes * Provides clear expectations to team members regardless of position in the organisation * Driven by meeting targets and achieving outcomes * Holds the team accountable with clear KPIs and monitoring performance |  |
|  | **Courage** | * Used to and comfortable in working in an environment where the end point is not always known at the start of a project * Used to and comfortable in working with imperfect data to make decisions and keep driving progress towards the desired end outcome * Takes calculated risks * Willing to be vulnerable * Has honest conversations even when it is hard * Making the tough decisions in the best interests of the organisation |  |
|  | **Transparent** | * Communicates openly * Shares information broadly |  |
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