



Job Description

FPA Technology and Digital Services Strategist

About FPA

The Financial Planning Association is the largest professional membership association for Certified Financial Planners™ and also includes members who support the financial planning process. With 23,000 members and 86 chapters, FPA represents and serves its members through professional education offerings, business development support, advocacy efforts and networking opportunities. As the organizational community for CFP® professionals, the FPA staff is dedicated to creating an exceptional experience for its members and volunteer leaders while moving the profession of financial planning forward.

Position Summary

The FPA Technology and Digital Services Strategist is responsible for the overall development, implementation, evaluation and improvement of technology/digital offerings across the OneFPA network. The strategist is responsible for ensuring that FPA's digital and IT services align with the organizational vision, business strategy, long-term objectives, and financial goals. This individual will evaluate and implement new technology and infrastructure to streamline business processes, increase employee productivity, and improve the quality of the overall customer/member experience. The strategist leads the digital strategy for FPA and is responsible for developing mutually productive and accountable relationships with current and prospective partners and vendors that support the overall digital ecosystem of the organization. The strategist leads project/product teams, manages internal/external support, and supports all functional areas of the organization with the use of technology and digital services. The individual will also manage database and analytics practices to drive enterprise decisions and support the strategies of the OneFPA initiative.

Primary Duties and Responsibilities

- Provides leadership and management of the formulation of objectives, goals, policies, procedures, systems and measures of the technology-related activities of FPA.
- Establishes the overall strategy for developing digital products and services that positions FPA as the leader in the field, working with marketing to ensure that the marketing strategy is aligned to drive traffic, convert sales and increase revenue.
- Anticipates future opportunities for FPA, and keeps organization current with competitive trends, new technologies, and industry standards. Champions innovation.
- Provides strategic and tactical planning, development, evaluation and coordination of the digital/technology systems for the organization.
- Creates a cost-benefit analysis of business operating systems to evaluate current and future business decisions of the organization from a technology perspective
- Serves as internal digital consultant for leadership, project managers, and operations team to identify and prioritize needs, evaluate options, and recommend solutions. Provides business

process evaluations, requirements, and risk assessments to match up with existing and future technology architectures.

- Oversees Digital Strategy portfolio. Ensures appropriate technology infrastructure, support, and expertise is in place for the association to operate effectively and to meet its long-term objectives.
- Provides program management oversight for approved digital/technology projects, monitoring timelines, deliverables, resource allocation, risk management, and contingency planning.
- Manages technology and data budget while achieving stated key performance indicator objectives.
- In partnership with senior leadership, identifies opportunities and risks for delivering FPA's products and services digitally, including identification of competitive services, opportunities for innovation, and assessment of marketplace obstacles and technical hurdles to business success.
- Works with CEO, executive team and staff to development and implement a culture of exceptional member/customer service around technology and digital offerings.
- Maintains strong working relationships with consultants and vendor partners of digital solutions. Interfaces with partners on new projects and planned enhancements/releases to centralize efficient decision-making.
- Manages contracts and ensures that service level agreements and business requirements are met. Holds partners accountable to deliver expected outcomes.
- Maintains up-to-date knowledge of technology standards, industry trends, emerging technologies, and best practices.
- Responsible for the overall technology security posture of the organization.
- Oversees general network, infrastructure, and application support, including helpdesk support and system maintenance.

Qualifications and Experience

- Bachelor's degree in Computer Science or Information Technology from a four-year college or university, or a combination of education and experience which demonstrates the necessary skills and abilities required for the position.
- Seven or more years of progressive experience in an association environment, including program management, vendor management, budgeting, customer support, systems support, as well as customer experience analysis and initiatives.
- Demonstrated experience developing and implementing organization-wide technological, and digital strategies aligned with organizational mission.
- Highly developed interpersonal skills, affinity for networking, and demonstrated high level of confidence and poise with a strong service orientation.
- Expertise in negotiation techniques and fiscal management.
- Ability to anticipate, identify, analyze, and capitalize on growth opportunities.
- Seven or more years of experience with direct oversight of Association Management Systems, Web Content Management Systems, Infrastructure, and ancillary support systems.
- Must maintain current knowledge and understanding of industry trends, current practices, new developments and applicable technologies regarding the use of technology in associations.

FPA as a Learning Organization

By committing to be a learning organization, we believe in learning from experience and experimentation. We support the creation, acquisition and transfer of knowledge and commit to modifying our behaviors and protocols to reflect new knowledge, insights and strategies. We believe that acquiring knowledge and innovating fast enough is the key to thriving in a rapidly changing

environment. We promote a learning organization work environment that is open to creative thought. We embrace the concept that solutions to ongoing work-related challenges are available inside each one of us. We cultivate and champion the ability to think critically and creatively, the ability to communicate ideas and concepts, and the ability to engage others in healthy cooperative processes that result in exquisite inquiry and action.

To realize the above, we believe in the following five core cultural values:

- A. Communication**
- B. Engagement**
- C. Courage**
- D. Transparency**
- E. Analysis**