



Platform Engagement Coordinator

Role based in New York, NY

CREO is a NYC-headquartered not-for-profit with a mission to mobilize and catalyze high-impact capital to drive the necessary transition to a low-carbon, sustainable, and prosperous future for all.

To achieve our mission, CREO works with a large ecosystem of global stakeholders, including Members (family offices, family foundations, and family-owned enterprises) and Affiliates (other investors), and provides knowledge and confidence-building through shared insights, research, and programming that focuses on the question of *how* to invest in the decarbonization transition.

CREO seeks a confident, service-minded, and technically curious **Platform Engagement Coordinator** to drive engagement, adoption, and recurring use of CREO's Data Platform. This member-facing role combines direct engagement with CREO Members and other external users with the day-to-day support and administration necessary to deliver a strong Platform experience.

The Platform Engagement Coordinator will lead demonstrations and onboarding, answer questions, help users identify relevant Platform capabilities and investment opportunities, and proactively encourage continued use. The role requires the Platform fluency and understanding of CREO's investment ecosystem necessary to engage credibly with users and respond confidently to questions in real time, while also supporting troubleshooting, data quality, testing, and documentation. This position reports to the Chief Operating Officer and works closely across the organization.

Primary Objectives

1. Member Engagement & Platform Adoption

- Lead audience-specific Platform demonstrations for prospective and existing Members and other external audiences, adapting discussions based on user interests, priorities, and questions.
- Serve as a primary point of contact for Members and other users, answering questions, identifying relevant Platform capabilities and investment opportunities, and guiding ongoing use.
- Monitor Platform activity and support targeted outreach, training, and re-engagement efforts to increase adoption, recurring usage, and deal activity.
- Develop strong Platform and investment ecosystem knowledge to communicate the Platform's value credibly to sophisticated investor audiences.



2. User Support & Platform Operations

- Manage Platform onboarding and administration, including account setup, access permissions, user records, form responses, and related workflows.
- Provide first-line support for internal and external users experiencing access, functionality, and data issues, resolving routine problems and escalating complex technical issues to Development.
- Support workflows connecting Salesforce and the Data Platform and maintain accurate, consistent information across systems.
- Conduct routine data maintenance and quality control, including tagging, deduplication, matching, validation, and discrepancy resolution.

3. Platform Testing & Improvement

- Conduct beta and user acceptance testing of new features and workflows, documenting errors and user-experience issues for Development.
- Gather and synthesize feedback from Members and internal users, identifying recurring questions, pain points, and feature requests and communicating actionable themes to the appropriate teams.
- Support feature rollouts and translate new capabilities into clear benefits and practical use cases for Members and other users.

4. Internal Enablement & Documentation

- Develop resources and guidance that help colleagues across CREO confidently communicate the Platform's capabilities, value, and common use cases.
- Maintain current user guides, training materials, FAQs, administrative procedures, and other Platform documentation.

Desired Qualifications

- At least 3 years of experience in client or member success, relationship management, platform support, or a related externally facing role; experience with investment or financial-services audiences is preferred.
- Strong communication and presentation skills, with the confidence and judgment to lead live demonstrations and respond effectively to sophisticated external audiences.
- Strong interpersonal and service orientation, with the ability to build relationships, understand user needs, and communicate product value.
- Strong technical aptitude and curiosity, including comfort learning new systems and troubleshooting routine user issues; Salesforce or similar CRM experience is preferred.
- Highly organized and detail-oriented, with an interest in CREO's membership, investment ecosystem, and climate-positive investment opportunities.

Compensation & Benefits

This role will be paid a base salary between **\$80,000 and \$95,000** in the NYC market, commensurate with experience. This role is also eligible for performance bonuses of up to 5% of base salary.



CREO relies on ADP as our employer of record. Medical, dental, and vision insurance plans are available through ADP for team members plus their spouse, children, or whole family; CREO contributes a monthly flat fee toward premiums. CREO also provides Basic Life and AD&D coverage at no expense to team members, equal to 1x Annual Base Earnings.

CREO offers a generous time-off package, including PTO and sick leave, week-long org-wide breaks in August and December, observance of federal holidays, and a Summer Friday program.

After six months of service, team members are eligible to participate in the company 401(k) plan, and CREO matches up to 4% on a payroll-by-payroll basis. Team members also have access to 12 weeks of paid family leave for qualifying life events after six months of service.

To apply, please send your resume and a note expressing your interest to hiring@creosyndicate.org.

Authorization to work in the United States is required.

More about CREO

All team members are partners in further engaging, supporting, and activating CREO's growing membership across two Global Hubs – the Americas and EMEA – and 30+ countries to advance CREO's goal of catalyzing \$1T of capital by 2029.

CREO is not, and does not provide services as an investment advisor, investment analyst, broker, dealer, market-maker, investment banker, or underwriter.

CREO strives to be a diverse, equitable, and inclusive workplace. As an Equal Opportunity Employer, we are committed to providing employees with a work environment free of discrimination and harassment. All employment decisions are based on business needs and job requirements. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.