



Title: Client Success Manager

Department: Strategic Marketing and Communications

Reports to: Director, Account Management

Status: Full-Time, Exempt

Location: Onsite - Overland Park, KS

Elevate Your Career at CreativeOne!

Looking for a dynamic and rewarding career in financial services? Join us at CreativeOne, where we blend collaboration, innovation, and excellence to forge a path in the financial services industry. We pride ourselves on being a nationally recognized leader, devoted to empowering independent financial advisors with superior services.

Why Join CreativeOne?

- Energetic and fun work environment
- A culture driven by solutions and results
- Opportunities for growth and development

We're Building a Better Financial Future, Together

We take immense pride in our work and are in search of like-minded individuals who are eager to make a significant impact. If you're ready to be a part of a team that's shaping the future of financial services, we'd love to hear from you.

Position Summary:

The **Client Success Manager** plays an integral role within CreativeOne's Strategic Marketing & Communication team. As the primary point of contact for all things marketing, they will work directly with CreativeOne's clients to assess marketing needs, create strategic marketing plans, and manage marketing projects by working in coordination with the entire marketing team to develop and execute traditional and digital marketing initiatives. They proactively respond to client needs, use problem-solving skills to handle issues arising between customers and internal teams, and are responsible for project management from inception to completion.

Duties and Responsibilities include, but are not limited to:

- Manage advisor relationships by working directly, professionally, and collaboratively with Clients, internal teams (sales, digital, creative, etc.), and other cross-functional teams as required to meet client needs.
- Strategically coordinate with clients and marketing team to create strategic marketing plans; hold clients accountable for sticking to plans and hitting goals.
- Ensure completion of digital marketing initiatives including online lead generation campaigns, social media, email nurture, content marketing, video marketing, SEO, website development, etc.
- Drive results with traditional marketing initiatives including logos, identity branding packages, direct mail, radio, TV, brochures, or fliers.

- Follow up with advisors to ensure satisfaction after project implementation and provide reporting metrics of projects and marketing campaigns.
- Input project data into project management software system (Asana)
- Work with compliance and legal department, as necessary.
- Maintain appropriate file documentation based on set guidelines.
- Prepare status reports on a weekly basis.
- Attend meetings with internal clients and external clients.
- Help with outsourcing of print projects.

Critical Skills Sought

- Ability to able to act as problem-solvers for a client.
- Strong ability to multi-task and establish priority of work.
- Strong understanding of digital marketing and strategy
- Adhere to specific process flows as set by Strategic Marketing and Communication team.
- Excellent communication skills
- Provide strategic thinking during project brainstorming sessions.
- This position works in a fast-paced environment, thus qualified candidates must be highly organized and able to juggle multiple responsibilities at the same time.
- Work closely with creative team including graphic designers, copywriters, and program managers as well as digital team including web designers, programmers, media buyer, and content strategist.

Demonstrate and Represent Our Core Values

- *Provide Unreasonably Excellent Service*
- *Love What We Do*
- *Act With Integrity*
- *Collaborate Courageously*
- *Evolve With Purpose*

Preferred Qualifications/Experience

- Bachelor's degree in marketing, related field, or commensurate experience.
- Four (4) years professional marketing experience including:
 - Account management.
 - Leveraging entire marketing mix to successfully promote the organization.
 - Building strong relationships with sales and cross functional groups
- Experience with digital, print, radio, and video projects a bonus.
- Expert proficiency in Microsoft Office Suite (Word, Excel, PowerPoint)

This description covers the major purpose and major functions of the job. It is not intended to give all details or a step-by-step account of the way each task is to be performed. Employees may receive other job-related instructions and be required to perform other job-related duties requested by their supervisor. All requirements are subject to modification to provide reasonable accommodation to qualified individuals with disabilities.

CreativeOne provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state, or local laws.