



INSURANCE • SECURITIES • WEALTH

Title: Marketing Automation & Operations Manager
Department: Strategic Marketing and Communications
Reports to: Digital Strategy Manager
Status: Full-Time, Exempt
Location: 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.

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 are ready to be a part of a team that's shaping the future of financial services, we would love to hear from you.

Position Summary:

Help leverage the latest technology to automate our company's marketing efforts while overseeing our campaign production, process management, and data analytics. Your core responsibilities will revolve around setting up an efficient, streamlined marketing infrastructure and training our marketing team members on utilizing new solutions.

As a **Marketing Automation & Operations Manager** at CreativeOne, you will be tasked automating manual processes and workflows, help lead our corporate email marketing strategy, and serve as a liaison between marketing, sales and key stakeholders teams to efficiently launch campaigns for both our corporate brand and our clients.

Our ideal candidate is a strategic thinker with a passion for automation, process improvement, and data-driven decision-making. You should have expertise in marketing automation tools like HubSpot, as well as project management tools like Asana, and proficiency with customer relationship management (CRM) software. A strong understanding of marketing technology platforms (such as HubSpot, GoHighLevel, Zapier, and Asana) is essential, along with the ability to collaborate cross-functionally with marketing, sales, and leadership teams.

Duties and Responsibilities:

- **Marketing Automation & Project Management:** Responsible for the implementation and maintenance of marketing automation and project management software, driving efficiency and effectiveness across all marketing initiatives.
- **Digital Marketing Strategies:** Create and implement digital marketing automation strategies to increase leads, improve campaign performance, and maintain customer databases, contributing directly to revenue growth.
- **Email Marketing:** Develop, manage, and optimize email marketing campaigns to enhance engagement, nurture leads, and drive conversions, ensuring best practices in deliverability, segmentation, and personalization.

- **Best Practices:** Ensure our marketing automation campaigns align with industry best practices to maximize effectiveness and return on investment.
- **CRM Utilization:** Utilize customer relationship management (CRM) software to develop lead generation and sales strategies that enhance customer acquisition and retention.
- **Data Analysis:** Review and analyze data to identify trends and create data-driven strategies that inform our marketing projects, ensuring they are both impactful and aligned with business objectives.
- **Cross-Functional Collaboration:** Oversee the planning and execution of marketing initiatives, serving as a liaison between marketing, sales, and leadership teams to ensure cohesive and successful campaigns.
- **Process Improvement:** Continuously analyze and suggest improvements to our processes, ensuring they are optimized for efficiency and effectiveness.
- **Stakeholder Reporting:** Report to upper management to keep all stakeholders informed and aligned with our marketing goals and achievements.
- **Technology Oversight:** Oversee the technology infrastructure supporting our marketing efforts, ensuring it is robust and scalable.
- **Deadline Management:** Ensure that all deadlines are met, maintaining the timely and successful execution of all marketing initiatives.

Preferred Requirements:

- Bachelor's degree in Marketing, Business, Communications, or a related field
- At least 5 years of marketing automation experience
- Sound knowledge of using automation tools like Hubspot, Marketo, Salesforce Marketing Cloud, Keap and Mailchimp.
- Understanding of lead generation procedures and customer life cycle.
- Proficient in audience segmentation.
- Strong understanding of digital marketing techniques like A/B testing.
- Ability to collaborate with team members from other departments.
- Exceptional interpersonal, communication, analytical, optimization, problem-solving and project management skills.
- Experience integrating APIs and building automated workflows using tools like Zapier to connect marketing technologies and streamline processes.
- Analytical and driven by data metrics.

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 possible 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.

No unsolicited agency or recruiter inquiries, please.