



Title: Account Coordinator, Client Success
Department: Strategic Marketing and Communications
Reports to: Director, Client Success
Status: Full-Time, Non 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 **Account Coordinator, Client Success** plays a vital supporting role within CreativeOne's Client Success team, partnering directly with Senior Account Managers and Account Managers to ensure smooth, timely, and high-quality execution of marketing initiatives across multiple internal sales and distribution teams.

This **Account Coordinator** role is the operational backbone of the account team—owning project workflow in Asana, coordinating marketing deliverables across channels, serving as a secondary point of contact for clients, and keeping projects on track from intake through completion.

The ideal candidate is organized, detail-oriented, proactive, and thrives in a fast-paced, collaborative environment.

Duties and Responsibilities include, but are not limited to:

- **Account & Client Support**
 - Support Senior Account Managers and Account Managers with day-to-day client operations across cross-functional teams as well as the assigned internal sales teams.
 - Serve as a secondary point of contact for routine client communications, including marketing orders, follow-ups, status updates, and coordination of next steps.
 - Attend internal and client-facing meetings as needed; help prepare agendas, notes, and follow-up action items.
 - Assist with the preparation of client-facing materials, including status reports, project summaries, and presentations.
 - Assist with preparing and distributing weekly reports and updates for assigned internal sales teams.
 - Follow up with clients after campaign implementation to gather data-centric feedback, including event attendance and overall campaign performance.
- **Project & Workflow Management (Traffic)**
 - Own project intake in Asana: build new projects using established templates, create and assign tasks, set due dates, and confirm all required fields are complete before work begins.
 - Review incoming requests to ensure all necessary details are present (deliverables, deadlines, assets, priority, compliance needs) prior to work kickoff.

- Monitor active project queues across account teams to ensure visibility and prioritization; identify stalled items, flag blockers early, and drive workflow forward to prevent bottlenecks.
 - Maintain accurate project statuses and stages in Asana; close and archive completed work to support clean, accurate reporting.
 - Help balance workload visibility across active accounts; communicate priority conflicts or capacity risks to Account Managers in a timely manner.
- **Marketing Coordination & Execution**
 - Assist with coordinating all creative requests including logos, brand kits, websites, and print materials.
 - Coordinate digital marketing campaigns including seminars, custom digital campaigns, and email campaigns.
 - Assist with ordering and coordinating print orders, ensuring accurate specifications, timelines, and delivery.
 - Route marketing deliverables through compliance review as needed; track approvals in Asana and follow up to keep work moving.
 - Maintain appropriate file documentation in accordance with internal guidelines.
- **Reporting & Analytics Support**
 - Assist with compiling and distributing campaign performance reports and analytics for Account Managers and clients.
 - Support the preparation of weekly status updates for clients and internal stakeholders.
 - Track project outcomes and consolidate metrics to support team reporting needs.
- **Internal Collaboration & Operations**
 - Partner closely with creative, digital, program, and compliance teams to support seamless project execution.
 - Provide backup support for Account Managers as needed during periods of high volume or absence.
 - Contribute to process improvement efforts by identifying recurring workflow gaps and suggesting improvements to templates, checklists, or intake requirements.

Critical Skills Sought

- Highly organized with strong attention to detail and the ability to manage multiple projects simultaneously in a fast-paced environment.
- Strong written and verbal communication skills; comfortable communicating clearly with both internal teams and external clients.
- Proactive problem-solver who can anticipate challenges, identify blockers, and coordinate solutions before they become delays.
- Process-oriented with the ability to follow established workflows and improve them over time.
- Ability to prioritize work effectively—understanding urgency vs. importance across competing projects and accounts.
- Strong collaboration skills; comfortable working across creative, digital, compliance, and sales teams.
- Familiarity with digital and traditional marketing deliverables and the ability to coordinate across channels.
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint); experience with Asana or similar project management tools is preferred, but not required.

Preferred Qualifications/Experience

- Bachelor's degree in marketing, communications, business, or related field (or commensurate experience).
- 2–4 years of professional experience in marketing coordination, account support, project management, or a related role.
- Experience coordinating or supporting both traditional and digital marketing deliverables preferred.
- Strong proficiency in Microsoft Office Suite.
- Experience with project management tools; Asana strongly preferred.
- Familiarity with financial services is a plus but not required.

Demonstrate and Represent Our Core Values

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

About CreativeOne

CreativeOne is an industry-leading marketing and consulting firm that helps independent financial advisors grow their businesses. We combine deep financial expertise with full-service creative and media capabilities, delivering tailored marketing that drives measurable growth. With over 40 years of innovation behind us, we’re building the next generation of advisor marketing—and we’re looking for top talent to help lead the way.

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.

Our company does not currently sponsor employment visas. Applicants must be authorized to work for any employer in the U.S.