



**Title:** Account Manager, Client Success

**Department:** Strategic Marketing and Communications

**Reports to:** Director, Client Success

**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.

### **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 Manager, Client Success is a strategic partner and relationship leader for CreativeOne's advisor clients. In this role, you will lead marketing strategy development, guide clients through customized marketing plans, and collaborate with internal teams to execute multi-channel initiatives that drive measurable results.

You'll serve as the primary point of contact—trusted advisor, project manager, strategic thinker, and problem-solver—ensuring every marketing initiative is aligned with client goals and executed with excellence. This role requires strong communication, marketing insight, organization, and a proactive, partnership-focused mindset.

### **Duties and Responsibilities include, but are not limited to:**

- Build and maintain strong advisor relationships by serving as the strategic marketing partner and primary point of contact.
- Lead strategic planning with clients, including developing annual and quarterly marketing plans aligned to their business goals.
- Hold clients accountable to milestones, deliverables, and the execution of agreed-upon plans.
- Coordinate and oversee digital marketing initiatives including: online lead generation campaigns, social media strategy, email nurture sequences, content marketing, video, SEO, and website development.
- Oversee traditional marketing initiatives including branding, logo development, identity packages, direct mail, radio, TV, brochures, and print materials.
- Partner with the internal marketing team (creative, digital, programs) to ensure seamless project execution.
- Provide insights and reporting on campaign performance, optimize plans, and guide next steps.

- Manage internal workflow using Asana and maintain accurate project documentation.
- Partner with compliance and legal teams to submit marketing materials and implement feedback.
- Prepare weekly status updates for clients and internal stakeholders.
- Coordinate outsourced print and media projects when needed.
- Support a positive, collaborative relationship between Client Success, Sales, and Marketing.

### **Critical Skills Sought**

- Strong strategic thinking with the ability to translate client goals into clear marketing plans.
- Exceptional relationship-building skills with a client-first mindset.
- Strong understanding of digital marketing tactics, best practices, and performance metrics.
- Excellent communication skills—verbal, written, and presentation.
- High level of organization, with the ability to manage multiple priorities in a fast-paced environment.
- Problem-solving mindset; able to proactively identify challenges and create solutions.
- Ability to collaborate effectively across creative, digital, and program teams.
- Comfortable leading conversations, setting expectations, and guiding clients through the marketing process.

### ***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, communications, business, or equivalent experience
- 4+ years of professional marketing experience, including account management or client-facing roles
- Experience developing and executing integrated marketing plans
- Experience working closely with creative, digital, and cross-functional teams
- Familiarity with financial services (bonus but not required)
- Proficiency in Microsoft Office Suite

*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.*