



INSURANCE • SECURITIES • WEALTH

Title: Client Success Traffic & Operations Manager
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.

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 Traffic & Operations Manager** is responsible for traffic control, intake quality, and workflow movement within CreativeOne's project management system (Asana). This role ensures that new work entering Asana is properly documented, prioritized, assigned, and positioned for successful execution.

The **Traffic & Operations Manager** supports Client Success Managers by maintaining momentum across active projects, strengthening clarity and consistency in project intake, coordinating internal workflow progression, and supporting timeline visibility. The ultimate goal of this role is to improve throughput, reduce bottlenecks, and drive faster, clearer execution by optimizing internal project intake and workflow management across client-facing work.

Core Responsibilities

- **Asana Traffic & Workflow Management**
 - Intake and/or build new projects in Asana as needed (apply templates, create tasks, assign owners, set due dates, and confirm required fields).
 - Review new requests/projects/tasks in Asana to ensure all necessary details are included before work begins (deliverables, deadlines, links/assets, priority, compliance needs).
 - Own the project/task queue by monitoring work in progress, ensuring visibility and prioritization, and maintaining clean handoffs between teams.

- Help balance workload across resources through traffic coordination, communication, and timely escalation of capacity conflicts.
- Drive workflow movement by identifying stalled items, flagging blockers early, and coordinating next steps to prevent bottlenecks.
- Maintain accurate statuses/stages in Asana and close/archive completed work to support accurate reporting.
- **Process Improvement & Reporting**
 - Maintain and improve internal workflow standards in Asana by documenting and reinforcing best practices for project setup, required fields, naming conventions, statuses, and handoffs.
 - Identify recurring intake gaps, bottlenecks, and sources of rework; recommend and implement process updates (templates, checklists, intake requirements, stage definitions) to improve throughput and on-time delivery.
 - Monitor project health and performance in Asana (e.g., aging tasks, overdue items, workload distribution) and escalate risks or capacity constraints to the Director of Client Success and/or Client Success Managers.
 - Support reporting needs by helping track project status and outcomes, consolidating metrics, and assisting with campaign reporting/analytics as needed.
 - Ensure project documentation is complete and consistent to support visibility, accountability, and accurate reporting across teams.
- **Timeline & Scheduling Support**
 - Support scheduling and timeline coordination by partnering with Client Success Managers and internal teams to align due dates and expectations.
 - Identify and communicate priority conflicts, risks, or capacity constraints early to prevent project delays.
 - Help maintain realistic due dates and milestone tracking in Asana to support on-time execution.
- **Coordination, Execution & Compliance Support**
 - Support internal team in fulfilling marketing requests from CreativeOne's producers.
 - Serve as a liaison between internal clients (producers) and the Strategic Marketing team.
 - Coordinate the intake, routing, and execution support of traditional and digital marketing initiatives as needed (logos/identity, direct mail, radio/TV, brochures/fliers, social, web, landing pages, content, email nurture, SEO, paid media).
 - Assist with compliance and legal coordination as needed by routing deliverables for review, ensuring required information is included, tracking approvals in Asana, and following up to keep work moving—while partnering with the Client Success Managers/Director on final compliance direction and approval.
 - Maintain appropriate file documentation based on internal guidelines.
 - Assist the Director of Client Success and Client Success Managers with day-to-day operational support (reporting, analytics, follow-up, project coordination).
 - Serve as backup support for Client Success Managers as needed.

Critical Skills Sought

- Strong attention to detail and process discipline (especially in task intake and tracking).
- Highly organized and able to manage many moving projects at once.
- Strong communication skills—comfortable nudging work forward across teams.
- Ability to prioritize work and identify urgency vs. importance.
- Ability to collaborate with the digital and automations team to understand evolving workflows, support process improvements, and adopt new tools and system enhancements.
- Confident working in structured workflows and improving them over time.

- Strong problem-solving skills to prevent delays and reduce inefficiencies.
- Comfortable partnering with creative and digital teams to support execution.

Qualifications / Experience

- Bachelor’s degree in marketing, communications, or related field (or commensurate experience).
- 2+ years professional experience in marketing project coordination, account support, or operations.
- Familiarity with traditional and digital marketing deliverables strongly preferred.
- Proficiency in Microsoft Office (Word, Excel, PowerPoint).
- Strong experience using project management tools (Asana preferred).

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 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.