



INSURANCE • SECURITIES • WEALTH

**Title:** Marketing Automation Strategist

**Department:** Strategic Marketing and Communications

**Reports to:** Digital Strategy and Operations Manager

**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 **Marketing Automation Strategist** builds and maintains the systems behind how CreativeOne's marketing function operates day to day. The work spans HubSpot, GoHighLevel, Zapier, and the Asana environment that powers the marketing team. It supports advisor-facing programs, corporate marketing campaigns, and the internal workflows that connect both. The role also builds the campaign funnels those automations power: landing pages, forms, and email nurture sequences, assembled and connected end to end.

The day-to-day is hands-on and build-focused, and this is a strategist's seat. We're looking for someone motivated to evolve the infrastructure, not just maintain it — the kind of person who sees a gap and strategizes a plan to close it. No formal coding background is required. You'll need to understand how platforms talk to each other, and you'll use AI tools every day. Follow-through is non-negotiable.

### **We are looking for a person who:**

- Has personally designed and built multi-step automation workflows and can explain both how one runs end-to-end and why it's structured that way.
- Has built complete campaign funnels, including the landing page, form, email sequence, and the automation connecting them.
- Has hands-on experience fixing integrations when they break, including diagnosing root cause across multiple platforms.
- Sees automation workflows, CRM logic, project management, and platform integrations as one connected stack, and can design across it.
- Has operated a work management system (Asana, Monday.com, or comparable) at depth, including templates, automations, rules, custom fields, and portfolio structure.

- Is comfortable managing work across multiple platforms at once and picks up new tools quickly.
- Improves SOPs where they fall short and writes new ones where none exist.
- Moves work quickly through to completion and is comfortable with fast turnaround on campaign builds and integration deliverables.
- Spots gaps in the infrastructure and brings a proposed solution along with the problem.
- Uses AI tools daily and has built something functional with AI in the last 90 days.

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

- **Marketing Automation, Funnels & Integration:** Build and maintain automation workflows in HubSpot and GoHighLevel, including triggers, branching logic, delays, send conditions, and CRM enrollment. Build automations for corporate marketing campaigns, advisor campaigns, and internal team workflows. Build campaign funnels end to end: landing pages, forms, email nurture sequences, and the automation logic that connects them to the CRM. Build and send email campaigns and nurture sequences including list segmentation, send logic, and deliverability hygiene, working from copy and strategy direction provided by the team. Build landing pages and forms and connect them to downstream automation. Build and maintain Zapier integrations across the tech stack. Troubleshoot integration errors when they break and diagnose root cause across the stack.
- **Asana Work Management Operations:** Operate the Asana environment that powers the marketing team, including portfolios, project templates, custom fields, automation rules, naming conventions, and intake forms. Maintain the AI agents inside Asana that monitor workload, manage task hygiene, and track campaign timing. Run the intake workflow that turns incoming form submissions into configured projects. Maintain templated projects for advisor, corporate, and team projects.
- **Platform & Vendor Operations:** Run the automation behind CreativeOne’s advisor-facing platforms including trigger logic, approval workflows, and monthly campaign delivery. Serve as the day-to-day technical contact for advisors using these platforms. Be involved in the relationship with platform vendors including escalations, feature requests, and tracking product changes that affect downstream automation. Keep platform automation compliant with industry regulations.
- **AI-Assisted Execution & Tool Building:** Use AI tools (Claude, ChatGPT, or comparable) daily for drafting, debugging, and accelerating builds. Operate within the AI infrastructure the organization has built, including Claude skills, compliance frameworks, and campaign architecture standards, and help improve that infrastructure as the stack evolves. Use AI-assisted development (vibe coding) to build small marketing tools and helpers for internal teams without needing formal coding experience.
- **System Health & Documentation:** Monitor the health of owned automations and integrations, including Zap error rates, workflow uptime, and integration failures. Flag operational anomalies and escalate before they become campaign-impacting problems. Maintain SOPs for all owned processes and document workflows, Zaps, and integrations so they can be picked up by others.

**Critical Skills Sought**

- Hands-on experience building marketing automation workflows in HubSpot, GoHighLevel, ActiveCampaign, or comparable platforms.
- Experience building and sending email campaigns and nurture sequences, including list segmentation and send logic.
- Experience assembling funnels: landing pages and forms connected to email sequences and CRM automation.
- Production experience operating a work management system (Asana, Monday.com, ClickUp) at depth, including templates, automations, rules, custom fields, and portfolio structure.
- Fluency in trigger, action, and condition logic, including designing branching workflows from scratch.
- Experience extending or improving an automation stack they didn’t originally build.
- Multi-step Zapier (or comparable) experience including conditional logic, filter steps, formatters, and lookup tables.
- Comfortable debugging integrations and diagnosing root cause when something breaks.

- Comfortable managing work across multiple platforms simultaneously.
- Documentation habits that allow another person to pick up the work without asking questions.
- Capable of moving multiple concurrent automation builds quickly through to completion.
- Daily use of AI tools (Claude, ChatGPT, or comparable), including at least one specific artifact built with AI assistance in the last 90 days.
- AI-assisted development (vibe coding) skills, including strong prompting fluency. No formal coding experience needed.

**Preferred Background/Experience**

- 5+ years of hands-on experience in marketing automation, marketing operations, or platform integration work.
- Production experience building and owning workflows in HubSpot or a comparable marketing automation platform.
- Production experience operating Asana, Monday.com, or comparable work management systems at scale.
- Cross-platform integration debugging in Zapier, Make, or comparable.
- Working knowledge of email deliverability, list hygiene, and conversion tracking across a funnel.
- Experience managing a vendor-provided program, white-labeled service, or client-facing marketing platform.
- Working knowledge of additional CRM platforms: GoHighLevel, Salesforce, Wealthbox, ActiveCampaign, or Keap.
- BA or BS in Marketing, Business, Communications, or related field preferred.
- Bonus: Financial services, insurance, or regulated industry experience.
- Code-by-Zapier (JavaScript) or webhook construction experience.
- Demonstrated AI tool use in a professional or project setting, whether for everyday marketing tasks or building something functional with AI assistance.

**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.

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*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.*