



Title: Marketing Operations Specialist
Department: Strategic Marketing and Communications
Reports to: Digital Marketing 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 Operations Specialist** is a digital channel generalist who owns the delivery of marketing across email, automation, social publishing, CRM, and integration platforms. This role serves as the primary owner of CreativeOne's advisor-facing platforms—including EngageOne (powered by Snappy Kraken) and Levitate—while flexing across the full spectrum of digital marketing channels as business needs evolve. Marketing Operations is the team where digital execution lives, and this role is at the center of it.

The ideal candidate is a detail-oriented executor who is equally comfortable managing a vendor-provided advisor program, building automation workflows, deploying social content, and using AI tools to accelerate work and build lightweight marketing tools. No formal coding background is required, but a genuine curiosity for how platforms connect, a fluency with AI-assisted workflows, and a bias toward getting things done are essential.

We are looking for a person who:

- Is a detail-oriented executor who follows established processes and asks smart questions when things don't look right.
- Understands how marketing automation workflows, email sequences, and platform integrations fit together.
- Can manage a vendor-provided advisor program with professionalism and responsiveness.
- Is comfortable working across multiple platforms and learning new tools quickly.
- Thrives in a structured environment with clear SOPs, defined ownership, and accountability.
- Uses AI tools as a natural part of their workflow to move faster, think through problems, and build things that would otherwise require a developer.

Duties and Responsibilities include, but are not limited to:

- **Advisor Platform Management:** Own the end-to-end management of CreativeOne’s advisor-facing marketing platforms, including EngageOne (white-labeled Snappy Kraken) and Levitate. Onboard new advisors, provide ongoing support, resolve tickets, manage content scheduling, and serve as the primary point of contact for advisors regarding their email nurture and social media content needs. Maintain advisor rosters across platforms and ensure all content remains compliant with industry regulations.
- **Email Marketing Execution:** Build and send marketing emails in HubSpot as assigned, following established templates, brand guidelines, and quality standards. Support A/B testing, list segmentation, and email performance tracking under the direction of the Marketing Manager.
- **Marketing Automation:** Configure and build marketing automation workflows in HubSpot and GoHighLevel. Own assigned workflows end-to-end and collaborate with the Marketing Automations Specialist on larger build-outs as needed.
- **Zapier Building and Monitoring:** Build new Zaps when tasked, monitor existing Zaps for errors, troubleshoot broken connections, and escalate systemic issues. Follow established patterns and documentation for Zap construction.
- **Social Media Publishing:** Schedule and deploy social content across platforms (LinkedIn, Facebook, etc.) using approved content provided by the creative team. Maintain publishing calendars, monitor for errors, and ensure timely delivery across advisor and brand accounts.
- **Vendor Relationship Support:** Serve as the day-to-day contact with platform vendors including Snappy Kraken and Levitate. Escalate platform issues, coordinate feature requests, and relay relevant updates to the Marketing Manager.
- **Process Documentation:** Maintain and update SOPs for all owned processes. Document new procedures as they are established. Use Scribe for visual walkthroughs paired with written documentation.
- **AI-Assisted Execution and Tool Building:** Use AI tools (such as Claude, ChatGPT, or comparable) as part of everyday marketing workflows to accelerate execution, improve output quality, and solve problems faster. Apply AI-assisted development (vibe coding) to build lightweight marketing tools, custom platform modules, and mini-apps that serve other teams—without requiring formal coding experience.
- **Cross-Channel Digital Execution:** Flex across digital marketing channels as business needs evolve. As new channels, platforms, and capabilities come online within Marketing Operations, take ownership of delivery and execution within those areas.
- **Marketing Analytics and Reporting:** Track and report on performance metrics across owned channels. Pull standard reports, flag anomalies, and contribute to the team’s growing analytics and reporting capabilities.

Critical Skills Sought

- Hands-on experience with marketing automation platforms (HubSpot, GoHighLevel, ActiveCampaign, or comparable).
- Strong understanding of email marketing fundamentals: deliverability, segmentation, workflows, A/B testing, and performance metrics.
- Ability to configure automation workflows and understand trigger/action/condition logic.
- Comfort managing integrations between platforms (Zapier experience strongly preferred).
- Detail-oriented with strong organizational and follow-through skills.
- Excellent written and verbal communication skills.
- Ability to manage multiple concurrent tasks and prioritize effectively.
- Professional and responsive demeanor when working with advisors and vendors.
- Demonstrated use of AI tools (ChatGPT, Claude, or similar) in a professional or project context to accelerate marketing work.
- Ability to use AI-assisted development (vibe coding) to build functional marketing tools—strong prompting skills required; no formal coding language proficiency needed.
- Comfort working with data and marketing performance metrics; ability to pull reports and identify trends across channels.

Preferred Background/Experience

- 3–5 years of experience in marketing operations, email marketing, or marketing automation.
- Hands-on experience with HubSpot or a comparable marketing automation/CRM platform.
- Experience managing a vendor-provided program, white-labeled service, or client-facing marketing platform.
- Experience with Zapier or similar integration/automation tools.
- Project Management Tools such as Asana, Monday.com, ClickUp, etc.
- BA or BS in Marketing, Business, Communications, or related field preferred.
- Bonus: Experience in financial services, insurance, or a regulated industry.
- Demonstrated use of AI tools 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.

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.