



INSURANCE • SECURITIES • WEALTH

Title: Senior 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 **Senior Account Manager** is a high-impact, client-facing strategist responsible for leading key advisor relationships, developing advanced marketing plans, and ensuring seamless execution across CreativeOne's full suite of marketing capabilities. This role demands a proactive advisor mindset, excellent communication skills, and the ability to think strategically across channels. You will collaborate closely with digital, creative, and media teams to deliver high-caliber marketing that drives measurable business growth for clients. **Senior Account Managers** operate with autonomy, lead client conversations with confidence, and mentor junior team members on strategy and best practices.

Key Responsibilities:

Strategic Leadership

- Serve as the primary strategic partner and trusted advisor to high-value accounts.
- Develop sophisticated annual and quarterly marketing plans tailored to advisor goals, audience, and growth stage.
- Proactively identify opportunities, challenges, and optimization strategies for each client's marketing roadmap.
- Lead marketing strategy presentations, performance reviews, and business discussions.

Client Relationship Management

- Build deep, credibility-rich relationships with advisors—understanding their business models, revenue drivers, and market positioning.

- Confidently guide clients through decision-making, expectations, and prioritization.
- Hold clients accountable to deadlines, deliverables, and strategic plans.

Cross-Functional Project Leadership

- Oversee and coordinate multi-channel execution across digital, creative, content, video, media, and program teams.
- Ensure flawless execution of marketing initiatives such as:
 - Digital lead generation
 - Facebook and Google campaigns
 - Website redesigns
 - Brand development
 - Video and media production
 - Email nurture and automation
 - Social and content strategies
- Provide direction and clarity to internal teams, ensuring alignment on goals and deliverables.

Performance, Reporting & Optimization

- Review key performance data and translate insights into clear next steps for clients.
- Lead optimization discussions and regularly update marketing plans based on results.
- Prepare and present reporting that is high-level, client-friendly, and strategy-focused.

Internal Leadership & Mentorship

- Model high performance, strategic thinking, and client communication best practices.
- Mentor junior account managers and support their development.
- Contribute to refining Client Success processes, playbooks, and workflows.
- Act as a strategic bridge between Client Success, Sales, and Marketing leadership.

Critical Skills Sought

- Strong strategic thinking and business acumen.
- Exceptional communication and presentation skills.
- Deep understanding of digital marketing and integrated marketing strategy.
- Ability to guide clients through complex decisions with confidence and empathy.
- Highly organized with strong project management discipline.
- Proven ability to influence, persuade, and build trust with clients and internal teams.
- Ability to thrive in a fast-paced environment supporting multiple high-value accounts.

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 related field
- 5-7+ years of professional marketing experience, including:

- Strategic account management
 - Providing marketing consulting or advisory services
 - Managing integrated marketing plans
- Experience leading or mentoring account managers
- Experience working with creative, digital, or agency teams
- Experience in financial services is a plus (but not required)
- Strong proficiency in Microsoft Office; familiarity with Asana is a bonus

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.

No unsolicited agency or recruiter inquiries, please.