

# Client Success Lead

FiComm Partners ("FiComm") is an integrated communications consulting firm serving financial services companies with a #NewSkool approach, specializing in the independent financial advisory and wealth management communities. Our strategic communications programs include branding, marketing, digital outreach, public relations, business consulting, and advisor education.

FiComm's clients include independent registered investment advisory (RIA) firms.

At FiComm, our competitive advantage is built on the strength of our relationships and our reputation in the industry, our enjoyment collaborating with each other and for what we do, and our desire to build a new and improved communications approach. Our culture is collaborative, high-intensity, and fully engaged, which we maintain by investing in highly motivated, enthusiastic people interested in being a part of something different and exciting.

## OUR VALUES

### **Integrity Without Compromise**

We keep our word, do what we say, and always strive to do the right thing every day.

### **Intentionally High Standards**

We're high performers with high expectations for ourselves, our work, and our clients. We create an environment where all Ficommers can continuously perform at the top of their game, recharge when they need it, and come back twice as strong.

### **Tenacious Growth Mindset**

Complacency has no place here. We are constantly seeking forward-thinking, disruptive, and innovative ideas to drive internal and external growth. We're tenacious about this, even when it's hard, because that is when the real growth happens.

### **Earned Optimism**

Our genuine optimism comes from our confidence. We know exactly what's possible because we know what we're capable of. That confidence lifts our clients and our coworkers and reassures them we can do almost anything, because we bring everything we've got to the table.

### **Team Before Self**

We're happy to leave our egos at the door, humbly accept feedback, learn with enthusiasm, embrace the gifts that others bring, and work together toward a common goal.

### **Industry Believers**

We're obsessed with our industry and possess a genuine belief in the power of financial advice to do good.

## POSITION OVERVIEW

**Location:** Remote

We are an integrated marketing agency specializing in financial services. Our unique client service model operates in "tribe wheels," where each team is led by a strategic account leader. We work with a diverse range of clients, focusing on delivering results-driven marketing solutions.

We are seeking a motivated **Marketing Client Success Lead** to serve as a client relationship lead across multiple client accounts within the financial services sector. As part of our "tribe wheel," you will collaborate closely with a Strategic Account Leader and others on tribe to ensure smooth project execution, deadlines are met, and high-quality deliverables are produced for clients.

## WHAT WE'RE LOOKING FOR

- **Proactive and Independent Thinker:** Someone who takes initiative, figures things out, and solves problems independently.
- **Hungry and Ambitious:** A driven individual eager to learn and grow, with the potential to take on larger roles in 5+ years.
- **Polished and Professional:** Client-facing polish with strong communication skills and a high level of professionalism.
- **Coachable and Trainable:** Open to feedback, eager to develop, and willing to learn new skills.
- **High EQ:** Strong emotional intelligence to manage client relationships effectively and navigate nuanced situations.
- **Organized and Detail-Oriented:** Able to juggle multiple tasks, manage schedules, and keep things moving smoothly.
- **Interest in Marketing and Operations:** Doesn't need a deep marketing background but should have a curiosity and willingness to learn about marketing and account operations.
- **Communicate complex information clearly and simply.**

## RESPONSIBILITIES

- **Client Communication:** Serve as the primary point of contact for clients outside live calls, ensuring they feel supported and informed.
- **Day-to-Day Account Operations:** Act as the "COO" of client accounts, driving deliverables and ensuring deadlines are met.
- **Synthesis and Note-Taking:** Take live notes during meetings, synthesize information into actionable next steps, and ensure clarity across teams.
- **Connect Dots Across Teams:** Facilitate communication between clients and internal/external teams, ensuring alignment and progress.
- **Proactive Problem Solving:** Anticipate issues and proactively address them before they escalate.
- **Execution-Focused:** Manage tactical day-to-day tasks, ensuring smooth account management and client satisfaction.

## QUALIFICATIONS

- 7+ years of experience in marketing execution, project management, or related roles.
- Excellent client relationship skills
- Strong English communication skills, both written and verbal.
- Familiarity with digital marketing, content creation, and financial services is a plus.
- Proactive, organized, and able to manage multiple projects in a fast-paced environment.
- Strong teamwork and client-facing skills.
- Experience with Outlook, Slack and Project management platforms like Wrike

## QUALIFIED APPLICANTS

Please send your resume and cover letter illustrating why you're the right fit for FiComm Partners to [connect@ficommpartners.com](mailto:connect@ficommpartners.com).