



Title: **Marketing Analytics Senior Manager**

Location: Any Location/Hybrid/Remote

### **JOB SUMMARY**

As the Marketing Analytics Senior Manager at Creative Planning, you will be the strategic architect of our data-driven growth engine. You will bridge the gap between complex data science and executive-level marketing strategy, providing the insights necessary to optimize our brand presence, client acquisition, and long-term retention.

As a direct report to the Chief Marketing Officer, you will oversee the development of our analytics framework, converting raw data into comprehensive insights that inform multi-million dollar budget decisions and improve the fiduciary services provided to our clients.

### **JOB DUTIES**

#### **Marketing Acquisition & Performance Analytics**

- **Attribution Modeling:** Design and manage multi-touch attribution (MTA) models to accurately assign value to various channels (Digital, Print, TV, Events, and Referrals).
- **Media Optimization:** Partner with the growth team to analyze channel performance, identifying high-yield opportunities to lower Client Acquisition Costs (CAC) while increasing lead quality.
- **Funnel Velocity:** Monitor the lead-to-client lifecycle, identifying bottlenecks in the conversion process and recommending interventions to increase sales velocity.

#### **Retention & Client Lifecycle Analytics**

- **Churn Mitigation:** Develop predictive models to identify "at-risk" clients and provide actionable insights to the wealth management teams to improve AUM retention.
- **Cross-Sell & Share of Wallet:** Analyze client portfolios and behaviors to identify opportunities for additional services (Tax, Estate Planning, Trust Services), driving deeper household penetration.
- **LTV Analysis:** Calculate and track Lifetime Value (LTV) across various client segments to guide long-term strategic investments.

#### **CX (Customer Experience) Analytics**

- **Journey Mapping:** Utilize data to visualize and analyze the end-to-end client journey, identifying "moments of truth" that impact client satisfaction.
- **Sentiment & Feedback:** Lead the analysis of NPS (Net Promoter Score), CSAT, and qualitative client feedback, correlating these metrics with business outcomes.
- **Digital Experience:** Collaborate with product and web teams to analyze user behavior on digital portals, optimizing for engagement and ease of use.

#### **Marketing Planning & Strategic Finance**

- **Budgeting & MMM:** Lead the annual and quarterly marketing budgeting process using Media Mix Modeling (MMM) to forecast the impact of spend on firm growth.
- **KPI Framework:** Establish and maintain the "Marketing Command Center"—a suite of executive dashboards that provide real-time visibility into marketing ROI.
- **Strategic Advisory:** Act as a primary advisor to the CMO on resource allocation, market trends, and competitive positioning based on data-driven forecasts.

### **Leadership & Soft Skills**

- **Data Storytelling:** Translate "rows and columns" into a compelling strategic narrative for the CMO and Executive Planning Committee.
- **Fiduciary Mindset:** Uphold data integrity, accuracy, and confidentiality standards, ensuring alignment with wealth management industry regulations and fiduciary responsibilities.
- **Collaborative Influence:** Partner cross-functionally with IT, Finance, and Legal/Compliance teams to ensure data accessibility and accuracy.
- **Agility:** Operate effectively in a fast-paced environment where the ability to pivot based on new data is essential.

### **REQUIRED EXPERIENCE / QUALIFICATIONS**

- **Experience:** 8–12+ years in marketing analytics, business intelligence, or data science, ideally within Financial Services, Wealth Management, or a high-growth Professional Services environment.
- **Education:** Bachelor's degree in a quantitative field (Statistics, Economics, Finance, Data Science). Master's degree or MBA preferred.
- **Data Stack:** High proficiency in SQL and experience with BI tools (Tableau, Power BI, or Looker). Experience with Snowflake or similar cloud data warehouses is a plus.
- **MarTech:** Familiarity with Salesforce (CRM), marketing automation platforms (HubSpot/Marketo), and Google Analytics 4.
- **Statistical Modeling:** Experience with Python or R for predictive modeling and advanced statistical analysis.