



Client Engagement Manager

General Description:

We are looking for an energetic client engagement manager to develop, influence and manage marketing programs. Execute a marketing strategy that captures the Heritage Planning Partners brand and focuses on growing the business, foster client growth, and retention by using data to drive the strategy. Provide sales and branding support to all our advisors. Specific responsibilities include but are not limited to:

Client Experience:

- Provide an exceptional onboarding experience for Heritage Planning Partners clients
- Manage Client Segmentation
- Deepen client relationships via firm initiatives and high impact client appreciation events

Branding & Communication:

- Influence and deliver on value proposition, brand identity
- Develop and implement a Marketing Communication Plan
- Broaden Heritage Planning Partners exposure within professional advisor networks
- Build and maintain a strong and consistent brand through a range of online and offline marketing channels

Marketing Strategy:

- Develop and implement marketing strategy
- Maintain client management systems with accurate data to assess and execute marketing efforts
- Vendor Management
- Manage social media
- Project management

Skills:

- Project focus agility (strong project management)
- Strong executional capabilities
- Exemplary written and oral communications
- Collaborations
- Superior Social media and internet management
- Problem solver & agile (on the fly projects)
- Strong client focus, excellent listening skills and attention to details
- Change Champion
- Team oriented

Minimum Requirements:

- Bachelor's degree
- 2-5 years-experience in client engagement and/or marketing
- Financial industry experience (preferred)
- Expert in office management systems and MS Office suite

<https://heritageplanningpartners.nm.com>