

# Senior Strategic Account Lead | Job Description

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 financial advisory and wealth management firms across advisor channels

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

We are an integrated marketing agency specializing in financial services, known for our unique "tribe wheel" client service model. Each client team is led by a Strategic Account Leader, and we partner with a diverse range of financial services clients to deliver results-driven marketing solutions that foster meaningful growth.

Reporting directly to the CEO, we are seeking an experienced **Senior Strategic Account Lead** to oversee all client accounts, ensuring best-in-class strategic direction, client experience, and team development. This role will provide high-level strategic oversight across all accounts while also serving as the direct strategic lead on key client relationships. It's imperative that this role apply our systematic and progressive lens to client work, where the oversight isn't just about quick wins – it's about laying strong foundations, building momentum over time, and creating replicable processes that support sustainable success, guiding clients through intentional evolution rather than

reactive change. Additionally, this individual will drive ongoing enhancements to Ficomm's Client Experience (CX) by keeping a pulse on the market, refining strategies through data, and then lead internal team training initiatives, and support the professional development of people leaders within the organization. The ideal candidate is a highly strategic thinker with exceptional leadership skills, a consultative approach, strong emotional intelligence (EQ), and a passion for developing both teams and clients. This is a pivotal role that will shape the agency's client service approach and contribute directly to business growth.

## WHAT WE'RE LOOKING FOR

- **Strategic Leadership:** A forward-thinking strategist who can see the bigger picture and guide teams toward long-term success that aligns business strategy with marketing strategy in a way that drives growth
- **High-Level Strategic Oversight:** Ability to oversee multiple accounts, ensuring consistency and quality in strategic execution across all client relationships.
- **People & Team Development:** A natural leader who can train, mentor, and develop both strategic account leaders and execution teams to enhance overall team performance.
- **Deep Financial Services Expertise:** Strong understanding of the financial services industry, particularly with financial advisory and wealth management firms across advisor channels, to provide impactful marketing strategies.
- **Problem-Solving Mentality:** A proactive thinker who excels at identifying challenges, synthesizing complex information, and developing innovative solutions.
- **High EQ & Relationship Management:** Strong interpersonal skills to manage relationships with clients and internal teams effectively.

## RESPONSIBILITIES

- **Strategic Oversight & Leadership:**
  - Serve as the senior strategic lead, providing high-level guidance across all client accounts.
  - Act as the primary strategic lead on select key accounts, ensuring alignment with Ficomm's product philosophy and CX frameworks.
  - Consistent strategic oversight across all accounts centered on organic growth, involving a disciplined and forward-thinking approach to unlock long-term value which requires every client initiative aligns with their core business objectives, identifying scalable opportunities, and continuously optimizing based on performance insights
  - Ensure consistency in strategic approaches across accounts while customizing solutions to meet client-specific needs.
  - Embrace Ficomm's systematic and progressive approach to organic growth, demonstrating a commitment to ongoing learning.
- **Enhancing & Refining Client Experience:**
  - Lead ongoing enhancements to the Ficomm Client Experience (CX), ensuring it remains a best-in-class framework for driving client success.
  - Continuously refine and optimize CX frameworks to align with evolving client needs and market trends.
  - Develop and implement strategies that enhance client engagement, satisfaction, and long-term partnership success.
  - Partner with the Head of Client Success to gather and analyze client feedback to drive improvements in service delivery, communication, and strategic planning.
  - Partner with internal teams to create scalable solutions that elevate client experience and ensure consistent execution across accounts.
- **Team Development & Training:**
  - Lead and mentor Strategic Account Leaders, providing training and professional development on Ficomm's CX frameworks and best practices.
  - Develop internal training programs to ensure that teams are equipped with the knowledge and skills necessary to execute at a high level.
  - Foster a culture of continuous learning and strategic excellence within the team.
- **Consulting, Relationship & Account Management:**
  - Act as a trusted advisor across all client accounts, proactively identifying opportunities for growth and delivering strategic guidance.
  - Facilitate strategic discussions with clients, helping them navigate challenges and achieve clarity in their business objectives.

- Communicate complex strategies in a way that is clear, concise, and actionable for both clients and internal teams.
- **Operational Efficiency & Execution:**
  - Partner with cross-functional teams to ensure strategic initiatives are executed with precision and aligned with client goals.
  - Partner with the Head of Client Success to drive continuous improvement in internal processes to enhance efficiency, scalability, and client satisfaction.
  - Maintain a pulse on industry trends, ensuring Ficomm's strategies remain innovative and competitive.
- **Strategy Development:**
  - Lead the creation of tailored client strategies aligned with Ficomm's product offerings and CX frameworks to achieve organic growth goals.
  - Analyze client-specific challenges and opportunities to develop innovative, results-driven approaches.
  - Lead the development of multi-channel lead generation strategies to diversify lead sources – including organic and paid digital campaigns, content marketing, events and sponsorships, referral programs, SEO / SEM, AEO, while collaborating with specialists for earned media and thought leadership collaborations
- **Strategic Thinking & Problem-Solving:**
  - Apply Ficomm's frameworks to synthesize clients' unique situations and connect the dots across different variables.
  - Demonstrate a high level of strategic thinking, offering creative and effective solutions to drive business outcomes.
- **Communication & Documentation:**
  - Clearly articulate strategic thinking across all organizational levels, simplifying complex ideas for diverse audiences.
  - Develop and present client-friendly documentation that makes strategies actionable and accessible.
- **Team Leadership & Execution:**
  - Guide the strategic account team in executing strategies with precision and alignment, creating actionable plans that prioritize ROI for clients.
  - Partner with the Client Success Lead to ensure all initiatives are sequenced for maximum efficiency and effectiveness.

## QUALIFICATIONS

- 10+ years of experience in strategic roles within marketing agencies, consulting firms, or financial services organizations.
- Demonstrated success leading and managing teams.
- Proven ability to develop and implement strategies that drive organic growth in the financial services sector.
- Strong consultative skills with experience navigating complex client challenges and building consensus.
- Exceptional communication and presentation skills, with the ability to distill strategic concepts into clear, actionable steps.
- Demonstrates high EQ, active listening, and the ability to build trust with clients and team members.
- Experience guiding teams in executing strategies, ensuring alignment with client goals and maximizing ROI.
- A proactive learner with a strong desire to understand and apply Ficomm's unique approach to growth.
- Familiarity with organic growth strategies and client experience frameworks.
- Background in working with cross-functional teams to deliver measurable results.

This is an exciting opportunity to join a forward-thinking agency and play a critical role in driving growth for our clients. If you are passionate about strategy, client success, and achieving tangible business results, we want to hear from you!

## 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).