



JOB SUMMARY/OBJECTIVES:

The Strategic Account Manager is responsible for account growth, retention, lead and monitor the service experience in key accounts. This role will partner with the Strategic Sales Executive in managing both new sales, growth and retention in key accounts. This individual will be responsible for building and maintaining strong relationships with our customers, understanding their unique needs and challenges, and ensuring that they are utilizing VisiFI's product suites to their fullest potential. This role is a member of the sales and marketing team supporting VisiFI and its plans for sustained growth, increasing product usage, direct sales of new products and services and delivering exceptional service. This position will report to the VP Core Product Management and Customer Experience.

ESSENTIAL FUNCTIONS:

- Collaborate closely with sales executives to develop and execute strategic account plans for key credit union clients, including identifying new sales opportunities, increasing product usage, and monitoring customer satisfaction
- Serve as the primary point of contact for assigned accounts –building and nurturing strong relationships with key stakeholders, specifically focused on existing business, ensuring successful product launch, solution performance, utilizing the product suites fully and effective communication
- Serve as the point person for service issues and escalations, working closely with tier 1 and tier 2 support and other team leads throughout the organization to ensure that customer needs are addressed in a timely manner
- With the Sales Executive, conduct regular business reviews with clients to assess their needs, identify opportunities for growth, address any concerns or challenges and customer satisfaction.
- Monitor and initiate contract renewal and new sales efforts in conjunction with the Sales Executive and Director of Account Management.
- Coordinate cross-functional teams within the organization to deliver exceptional service and support to customers, ensuring that their needs are met in a timely and efficient manner.
- Stay abreast of industry trends, market developments, and competitor activities to identify new opportunities and potential risks within the credit union sector.
- Provide feedback to product development teams based on customer feedback and market insights to continuously improve our offerings and stay ahead of the competition.
- Track opportunities for new sales activities and progress according to company's sales process and within the company provided contact management software.
- Represent the company in an ethical and professional manner that is representative of the company brand image and market expectations.
- Follow and adhere to all policies as outlined in the Employee Manual.
- Adhere to and manage the approved budget and company spending policies
- Other duties as assigned by management.

TECHNOLOGY/SOFTWARE USED:

FI Navigator

Salesforce

JIRA

Microsoft Office Suite, including Outlook, SharePoint, Excel, PowerPoint

VISIFI applications as required



Strategic Account Manager

KNOWLEDGE, ABILITY AND SKILLS YOU MUST BRING:

Ability to execute sales strategies and plans, understand market and customer, possess strong oral and written communication skills and the ability to manage complex matters, learn VISIFI and third-party products, close sales, proactively solve problems and to build strong relationships with teammates, customers, and partners.

- Proven track record in relationship management and service excellence; demonstrate success in cultivating business generation of financial technology and software solutions
- Previous management experience(preferably C-level) with sound business acumen in financial services (banking or credit unions)
- Demonstrated leadership and attention to detail at strategic and tactical levels
- Positive attitude and passion for helping the full team succeed
- A mindset of continuous learning and improvement
- General understanding of the financial services market, challenges, trends, and operations
- Possess ability to think strategically and make sound business decisions. Ability to learn intricacies of the industry, company products, third-party products and communicate proper practices and customer benefits.
- Ability to manage customer's expectations, align solutions to customer needs, and internal timeliness and commitments
- Ability to manage difficult situations in a tactful, polite, and patient manner
- Excellent verbal and written communication skills
- Sense of ownership, urgency, efficiency, and accountability
- Critical thinking and ability to exhibit excellent judgment
- Experience using CRM Systems

COMPETENCIES:

- **Analytical**--Synthesizes complex or diverse information; Collects and researches data; Uses intuition and experience to complement data; Designs workflows and procedures.
- **Customer Service**--Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service; Meets commitments.
- **Interpersonal Skills**--Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things.
- **Consultative Sales Skills**—Engages industry contacts easily and builds their trust and confidence; discipline and organization to drive consistent habits and sales activity; ability to define sales strategy at an account level to determine best approach for successful revenue; ability to foresee and respond to sales objections as they arise.
- **Problem Solving**--Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.
- **Teamwork**--Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.
- **Motivation**--Sets and achieves challenging goals; Demonstrates persistence and overcomes obstacles; Measures self against standard of excellence; Takes calculated risks to accomplish goals.
- **Leadership**--Exhibits confidence in self and others; Inspires and motivates others to perform well; effectively influences actions and opinions of others; Accepts feedback from others; Gives appropriate recognition to others.



Strategic Account Manager

WORK ENVIRONMENT: REMOTE

Work involves everyday risks or discomforts which require normal safety precautions. This position requires frequent travel with the potential for 10 or more days per month, including weekend and overnight travel.

PHYSICAL DEMANDS:

Work is essentially sedentary but may require frequent standing and walking.

COMPENSABLE QUALIFICATIONS:

Bachelor's degree in business or equivalent with at least three years of successful sales experience and customer services, preferably in technology software in the financial services industry, or equivalent of education and experience.

The above is intended to describe the general content of and requirements for the performance of this job. It is not to be construed as an exhaustive statement of duties, responsibilities, or physical requirements. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee signature below constitutes the employee's understanding and agreement of the requirements, essential functions, and duties of the position.

Employee _____ Date _____
Witness _____ Date _____