

**JOB SUMMARY/OBJECTIVES:** VisiFI is seeking a Solution Consultant to join our growing team. The Solution Consultant is a member of our sales team and is responsible for supporting revenue generation within new business pursuits. The role is responsible for being a solution platform expert with strong business aptitude, technical expertise and competitor and industry knowledge. The position will be supporting new sales, utilizing our sales methodology, involving demos, needs assessment, and competitive analysis. You will be a cross-functional resource for VisiFI's sales, marketing, product teams so that you better understand our digital, core platforms, and deliver tailored solutions that address the specific needs of our Credit Union and Community Banking clients. This position reports to the VP of Sales and Channel Partners.

**ESSENTIAL FUNCTIONS:**

- Engage in consultative conversations with financial institutions as they assess their own capabilities, needs, and ability to evaluate our technology platforms
- Lead pre-sales and be the expert for core and digital solutions, prepare pre-sales meeting content, including demo environment, solution collateral, and position and demonstrate how the products address specific customer needs and pain points.
- Effectively communicate with C-Suite and all levels of customers or partners who can influence in the decision making for the organization
- Effectively manage complex technical concepts and communicate them effectively to both technical and non – technical stake holders in a professional and motivating manner.
- Display a deep understanding of core and digital platform's features and functionality, as well as a comprehensive understanding of financial products, services, and market trends
- Be a consistent part of the sales engagement team and actively participate in relevant site-visit and remote in pursuit of new business.
- Strong technical acumen to understand and articulate VisiFI solutions, staying extremely on top of product roadmap and ongoing releases
- Be the internal liaison between Product, Technology, and Sales and collaborate with the leads, sharing competitive and market intel, and supporting product enhancements and/or issues
- Achieve annual revenue goals set for the position by your manager
- Aid in RFP responses to RFP processes where the organization chooses to engage
- Be an expert in competitor and partner solutions similar to our core and digital platforms
- Commitment to ongoing professional development and staying abreast of industry best practices
- Awareness of international financial markets and perspectives on Fintech trends
- Attend industry events and activities as requested to build market contacts and network.
- 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.
- Other duties as assigned.

**TECHNOLOGY/SOFTWARE USED:**

Dynamics  
Salesforce  
JIRA  
Microsoft Office Suite, including Outlook, SharePoint, Excel, PowerPoint  
VISIFI applications as required

### **KNOWLEDGE, ABILITY AND SKILLS YOU MUST BRING:**

Candidate must possess excellent oral and written communication skills, possess ability to learn and be expert with our digital and core solutions, third party products as well as a demonstrated ability to build relationships, assess needs thorough demonstrations of product and ability to understand and resolve customer issues.

- Strong experience in support sales and support revenue generation teams, consulting and demonstrating success in new business generation of financial technology and software solutions.
- 4-6+ years working for a B2B SaaS-based technology company as a Solutions Consultant, Sales Engineer, or related technical product demonstration capacity
- Experience working with financial institutions (preferred credit unions and community banks)
- Positive attitude and passion for helping others succeed.
- A mindset of continuous learning and improvement
- A strong interest in technical or software sales, and especially digital and core banking
- Strong technical or product foundation, with the ability to learn technical concepts quickly and convey complex technical information in a clear and concise manner
- High-energy, results-driven sales consultant with sound business acumen and technical aptitude
- Strong understanding of and established network within the credit union, community bank and fintech industry.
- Deep understanding of market dynamics, competitors, trends and operations
- Ability to evaluate market and emerging trends, customer demands and collaborate across the organization to develop and/or partner to deliver competitive solutions
- Excellent verbal and written communication skills
- Analytical problem solver
- Sense of ownership, urgency, efficiency, and accountability
- Critical thinking and ability to exhibit excellent judgment
- Thrives in a fast-paced environment
- Experience using CRM Systems (Dynamics preferred)
- Willing to travel up to 30%– onsite mtgs, trade shows, etc.

### **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.
- **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.



**Solution Consultant**

**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 ten years of successful sales experience and/or training 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 \_\_\_\_\_