



### **JOB SUMMARY/OBJECTIVES:**

VisiFI is seeking a driven and relationship focused Sales Executive to join our growing team. The Sales Executive is responsible for generating revenue growth within new business pursuits, in addition to third-party partners. This position is responsible for ensuring a clear understanding of the assigned accounts and partners' strategic objectives, our technology solutions, market demands and industry network. The Sales Executive is a member of the sales and marketing team supporting VisiFI and its plans for sustained growth; executing sales strategy to support revenue generation; increasing product usage, direct sales of new products and services and management of distribution channels. This position will report to the VP of Sales & Channel Partners

### **ESSENTIAL FUNCTIONS:**

- Effectively develop and implement customer and partner plans to increase revenue growth, retain and grow business and expand market share, including new sales and services, manage customer and partner relationships.
- Using a consultative sales approach, identify and establish trusting relationships with prospects, and partners, understand their strategy, identify opportunities, and manage, retain, and generate new revenue.
- Effectively communicate with C-Suite and all levels of customers or partners who can influence in the decision making for the organization.
- Assess prospect, customer or partner needs, and present relevant company solutions in a professional and motivating manner.
- Lead interaction between customers, partners, and internal departments; engage subject matter experts only after the lead is qualified and clear objectives are defined.
- Achieve annual revenue growth targets as assigned by your manager and organization.
- Acquire and develop relationships with new customers, channel partners and existing clients.
- Work closely with Sales and Marketing Team, customers, and channel partners to negotiate and close opportunities.
- Effectively manage communications related to contract negotiations between customer/prospect and company legal advisors. Timely and accurately provide required information to VisiFI Legal division for creation of legal documentation.
- Communicate relevant market feedback and input to the company in support of product enhancements and or issues.
- Attend industry events and activities as requested to build market contacts and network.
- Adhere to and manage the approved budget and company spending policies.
- Track sales activity and progress within the company provided contact management software.
- Prepare and maintain a sales pipeline report as directed by the Sales VP
- 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 by management.

### **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:**

Ability to execute sales strategies and plans, understand market and customer, possess strong oral and written communication skills, the ability to learn VISIFI products as well as third part products, close sales and to build strong relationships with teammates, customers, and partners.



## Sales Executive

- Must have proven track record in sales, customer, and partner relationship management, and demonstrate success in business generation of financial technology and software solutions.
- Demonstrated leadership and attention to detail through prior experience at strategic and tactical levels
- Positive attitude and passion for helping others succeed
- A mindset of continuous learning and improvement
- Solid understanding of and established network within the credit union, community bank and fintech industry.
- 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.
- Proven track record of success in revenue growth, closing sales, channel, and partner management and
- Ability to evaluate market and emerging trends, customer demands and collaborate across the organization to develop or partner to deliver innovative solutions.
- 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.
- **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.

### 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.*