

Title: Sales Executive

Overall Job Description:

Responsible for prospecting, qualifying and closing new sales opportunities across the country for our consulting lines of business. This position will target credit unions who may need assistance in evaluating and selecting vendors based on their strategic goals. The ideal candidate will have established credit union executive relationships across the country and experience in selling Payments related products (Credit, Debit, PIN Networks, Loyalty) or Online/Mobile Banking.

Responsibilities Include:

- Developing new business via cold calling, email and social media
- Generating leads by attending industry events (tradeshows)
- Conducting industry webinars educating the market on our services
- Establishing executive level relationships with credit unions of all sizes
- Conducting needs analysis to identify a credit union's challenges and align with CU Engage services
- Work closely with marketing resources to leverage marketing campaigns
- Manage all sales activity in internal CRM system for reporting
- Travel 50% or more nationwide

Experience:

- 5 or more years of experience in the credit union/banking industry with preference given to sales related to credit/debit card processing, electronic banking, bill pay and/or mobile banking.
- Knowledge of Credit Card Processing, Debit Card Processing and Online Banking, vendors, tools and processes
- Facilitate creative problem-solving sessions with all levels of leadership teams across different line of business disciplines.
- Present complex solutions to senior leadership teams.

Skills/Competencies

- Exceeding Sales Goals – Demonstrated ability to meet or exceed sales goals annually
 - Self-Managed – ability to drive oneself toward established goals
 - Problem Solving - Identifies and resolves problems in a timely manner. Gathers and analyzes information skillfully. Works well in group problem solving situations. Uses reason even when dealing with emotional topics
- (continued)



(rev. 11.19.2018)

CU Engage
450 Carillon Pkwy Suite 130
Saint Petersburg, FL 33716
727-698-9973
info@cuengage.com

- Collaboration - Effectively builds and maintains partnerships with clients, prospects and people at all levels across the company. Contributes to team and company success. Maintains flexibility and reacts to change appropriately. Communicates and shares information with candor that builds trust and enhances relationships.
- Communication - Creates and sustains ongoing forums that encourage two-way communication opportunities. Demonstrates and promotes positive prospect, client, and work relationships. Proactively addresses and manages conflict and disputes. Works to achieve constructive resolution.
- Planning/Organizing - Prioritizes and plans work activities. Uses time efficiently. Plans for additional resources. Sets goals and objectives. Organizes or schedules other people and their tasks. Develops realistic action plans.
- Quality - Demonstrates accuracy and thoroughness. Looks for ways to improve and promote quality. Applies feedback to improve performance. Monitors own work to ensure quality.
- Technical Skills - Assesses own strengths and weaknesses. Pursues training and development opportunities. Strives to continuously build knowledge and skills. Shares expertise with others.
- Professionalism – Approaches others in a tactful manner. Reacts well under pressure. Treats others with respect and consideration regardless of their status or position. Accepts responsibility for own actions. Follows through on commitments.
- Adaptability – Adapts to changes in the work environments. Manages competing demands. Changes approach or method to the best fit the situation. Able to deal with frequent changes, delays, or unexpected events.
- Time Management - Ability to multi-task and prioritize conflicting tasks and requests.
- Presentation - Confident and compelling presentation skills, with proven ability presenting to senior leadership.
- Negotiation – Ability to broker the negotiation of complex deals to a successful resolution.
- Software Planning and Presentation Tools - Proficient in Microsoft Office and other project mgmt. software experience

Education/Training:

- Bachelor's Degree - Preferably in business, communications or marketing

Benefits:

CU Engage is a boutique consulting firm that works hard and plays hard! We are looking for someone who can lead our sales initiatives and continue to foster the amazing growth we have had over the last 5 years – continually growing 150% on average in revenue. We offer tons of perks!

- Competitive medical, dental and vision plans
- Flexible Spending Accounts and Dependent Care Coverage
- Generous 401k matching
- Great team building activities
- Collaborative team environment
- Gym Membership (for St Pete office only)
- Generous Comp Plan



(rev. 11.19.2018)

CU Engage
450 Carillon Pkwy Suite 130
Saint Petersburg, FL 33716
727-698-9973
info@cuengage.com