

# James Charanis

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## Sales Executive & Director

*Technology Motivator: Leader & Catalyst in Financial Services Market*

### Executive Summary

Market leader with 25 years of innovative experience in team management, sales, marketing and product strategy. Solid foundation in direct selling and technology solution design. Offering winning strategies and analysis in the marketing and delivery of complex software solutions to “C” level executives in banking and enterprise clients. Unique background of success as an individual contributor, leader, executive and a founder in the software and online services business. Reputation for superior executive engagement, presentations and contract negotiation.

- ▶ **Leads innovative development of go-to market strategies for online banking and cash management sales.** Leverages combination of success in enterprise sales to financial services companies and knowledge of business banking solutions to deliver fast market assessment and key market insights. Strategies include opportunity-based sales, business value initiatives, executive engagement, custom enterprise solutions, building brand architecture and building business partnerships.
- ▶ **Leads national, cohesive, cross-functional teams to optimal performance.** Develops high-performing rising stars by facilitating executive engagement and empowerment. Excels in setting sales goals, commission plans and territory plans, as well as leading teams in product, strategy and planning.

### Professional Experience

#### Intuit

2005-Present

#### **MANAGER, KEY ACCOUNTS** (2010-Present)

Drove corporate strategy, leading a team of relationship managers to achieve recurring revenue growth, contract renewals and add-on sales. Trained, coached and developed a team with a focus on building a culture of executive engagement and driving new business. Transitioned team focus from territory development and ongoing account management to strategic opportunity-based sales and account growth. Motivated team to support customers during conversion of customer base to a new technology platform. Leverage cash management expertise to engage with cross-functional product and marketing teams to develop business banking products. Coach extended sales teams to accelerate growth and facilitate innovation.

- ✓ Promoted to lead Key Accounts team of 7, working with existing customers in relationship management to grow and protect over \$85M annual revenue. Increased recurring revenue over 14% each year over the past 3 years as a manager (fiscal year runs August until July). The total number of accounts has been redistributed to other teams for increased engagement from 105 to 85 over the years but the average revenue per account continues to increase – now at \$1,000,000 per account per year. Exceeding cross sell and contract renewal goals, driving both customer retention and end-user growth.
- ✓ Lead dedicated, cohesive team of top account performer in FY2013 (ending in July, 2013), exceeding sales and revenue growth goals with mobile banking product sales at more than 200% of quota exceeding 85% penetration of that net-new solution. 4/7 team members qualified for CEO club, top leader qualifying for CEO club this year (FY2013)
- ✓ Develop high-performing teams by empowering relationship managers to take leadership roles with their clients. Promoted 3 of my team members to the National Account team over 3 years.
- ✓ Achieved 102% of revenue goals of 14% growth with over \$85M total billings for FY2011. Exceeded FY2012 sales, revenue and retention goals building on a strong first year in leadership earning Outstanding Achiever Award.

#### **SENIOR SALES EXECUTIVE, NATIONAL ACCOUNTS** (2005-2010)

Developed enterprise sales opportunities and closed them with sustained customer satisfaction. Specialized in executive engagement and discovery. Participated in several cross-functional teams with product, strategy and planning. Coached and partnered with sales staff to develop business-banking opportunities.

- ✓ Summit Club (CEO) Winner for achieving over 120% of quota in FY2008, MVP (Top Seller) in FY2009. Promoted to National Sales executive in FY2010.
- ✓ Closed several multi-million dollar sales in each territory role including Bank of Nevada, Bangor Savings Bank, Firsttrust and Hudson Valley.
- ✓ Created a new opportunity in business-banking and commercial banking marketplace as a player coach developing a pipeline of \$52M in corporate banking opportunities and closing big name accounts such as BankUnited, Beneficial and Mainsource.
- ✓ Developed best practices and processes for business-banking sales and marketing, including team training.

### **Financial Fusion (Sybase, Inc.)**

2002-2005

#### **SOLUTIONS SALES MANAGER**

An Independent Consultant brought in to establish credibility and closed more than \$3M in revenue. Served as a subject matter expert (SME) for product development and implementation projects while continuing sales efforts. Hired by the company to lead direct sales effort, selling new cash management services and products to existing and new customers. Developed and sold new business to some of the largest financial institutions in the country utilizing complex, in-house custom implementations of integrated online banking solutions for retail, small business and commercial bank customers.

- ✓ Developed strategic marketing and sales strategy for a new commercial banking product.
- ✓ Exceeded goals for new corporate banking customer sales with 7 new customers from 2003 to 2004.

### **Docucorp International (Acquired by Oracle, Inc.)**

2001-2002

#### **PRACTICE LEADER, BANKING TEAM**

Hired and managed Geographic Sales Team, setting sales goals, commission and territory plans. Collaborated with the marketing team to build brand architecture for targeting financial services industry.

- ✓ Top performer with sales increase over 100% from FY01 to FY02.
- ✓ Collaborated to initiate a vertical market for the banking industry including marketing and product development.

### **Zyman Marketing Group**

2000-2001

#### **VICE PRESIDENT, SALES**

Worked with Sergio Zyman, former Chief Marketing Officer for the Coca Cola Company, for this “.com” start-up.

### **Magnet Communications, Inc. (Now Bottomline/Intuit)**

1997-2000

#### **VICE PRESIDENT, SALES & SALES SUPPORT**

Founder, responsible for the initial development of Direct and Channel Sales organization. Developed the marketing strategy for business partners and strategic alliance while closing the majority of the new business in 1997 and 1998. This was until a formal sales and sales support operation was implemented in mid 1998 when I was promoted to team lead.

- ✓ Consistently on target, exceeding revenue booking goals and achieving MBO goals, growing revenue from \$200K to \$8M in three years.
- ✓ Managed direct sales team of 5 sales representatives and 4 sales engineers through rapid growth.
- ✓ Developed strategic reseller and alliance business development partnerships, trained and supported their sales efforts resulting in \$1M in additional, indirect revenue.
- ✓ Hired, managed and led Sales Support team, set MBO and sales goals. Trained and managed the group in 1999 and 2000, eventually promoting a team member to management responsibilities.
- ✓ Directly involved with the President, Board of Directors and investors through 3 rounds of VC funding.

**Additional: MAJOR ACCOUNTS MANAGER** – Mobius Management Systems, Inc.; **DISTRICT MANAGER** – Microdynamics, Ltd.

## **Education & Professional Development**

### **University of Maryland College of Business and Management**

Bachelor of Science, Marketing/Decision & Information Sciences

## **Technical Skills**

Proficient in MS Office, Spreadsheet & Database Design/Modeling, HTML/Web Design, Literate in Cloud, Internet & SaaS