Charlene is an articulate, accomplished service & technology Sales Leader. With 5+ years consumer sales and 10+ years commercial experience selling application software to enterprise clients. She enjoys brand development, cultivating new business strategy and aligning business strategy with sales execution. She currently manages her financial practice & has previously held senior sales roles with world-class technology innovators.

SKILLS

* Helping individuals & small businesses translate their financial goals into reality
* Master multi-tasker
* Recognized coach & mentor
* Brand Development
* New business development
* Client acquisition & retention
* Financial markets
* Operations Management
* Product & Services Sales
* Enterprise account management
* Territory Management
* Partner business planning & deliverables
* Enterprise software
* Predictive Analytics
* Risk Management
* Business Intelligence
* CRM

Professional History

**Financial Services Sales, 2019 to present**

**New York Life - CA**

* As a licensed Life, Accident & Health Agent, Charlene is building her business for the Silicon Valley General Office. She helps clients create, build & preserve wealth.
* Her financial services practice is focused on the entire sales process, utilizing proven sales methodologies and leveraging social networking to expand reach to high net worth clients & small business prospects.

**Sales Team Leader, Manager, 2015 to 2017**

**Ann, Inc./LOFT/Ann Taylor – CA & NY**

* A master multi-tasker in a high volume sales transaction based retail business
* Collaborates with multi-national clients to understand consumer buying patterns & behavior
* Provides excellence in clienteling, exceeds daily metrics, manages business & financial operations
* Manages a team up to 10 Associates
* Financial responsibility up to $10,000 per day.

**Caregiver, 2014 to present**

**CA**

* Priority decision: healthcare management for aging parents.

**Account Executive Capital Markets, 2010 to 2011**

**Teradata Corporation - NY**

* Competitively selected to develop net new Capital Market accounts
* Key prospects included Barclays Capital, Deutsche Bank, Goldman Sachs and UBS
* Hunter role, new business development driving $2m in revenue in an underdeveloped territory
* Key products to include: Scalable Data Warehousing (Enterprise), database software, compliance/risk management & network infrastructure.

**National Account Manager Capital Markets, 2008 to 2010**

**The SAS Institute - NY**

* Recruited to manage two marquise Capital Market accounts: Lehman Brothers & Merrill Lynch, selling renewal based predictive analytics.
* Team lead on Morgan Stanley, MS/Smith Barney integration 2010 and Barclays Capital, former Lehman Brothers
* $1M quota assignment - Average deal size on Capital Markets team $150K
* 105% quota attainment in 2008 (9 months tenure: Lehman $1.050M)
* 150% quota attainment in 2009 (Morgan Stanley $1.5M)
* 166% quota attainment in 2010 (Morgan Stanley $2.5M).

**Financial Markets Sales Executive, 2006 to 2008**

**Information Builders - NY**

* Recruited to build a financial services market leveraging proven direct & partner sales skills
* Greenfield market selling operational business intelligence and integration software to dormant customers and prospects.
* $1.6M quota assigned to named accounts – Average deal size on team $100K
* First deal closed within 60 days
* 136% quota achievement in 2007 - $2.176M revenue attainment – Average deal $650K
* Built pipeline from $500K to $4.0M in 6 months
* Major accounts include Lehman Brothers ($1M closed), Federal Reserve Bank & Deutsche Bank (300K closed).
* Awards: Quota Club, 2007 Eagles Club, Top 20 Sales Executives in North America 2007, #3 Sales Executive in North America/Q3 2007, #1 Sales Executive Eastern Region/Q3 2007.

# Director NA Partner Sales, 2003 to 2005

# SAP America - PA

# Hired by the Americas CEO to showcase results with partner accounts

# Created and executed a sales plan based on incremental & influential SAP software/partner services revenue

* Started at $18M in partnership revenue. $46M by year two – 250% license revenue growth; 115% attainment
* 38% Cap Gemini services sales growth year over year
* 352% Cap Gemini services pipeline growth year over year
* Built a $98M four quarter rolling pipeline in 6 months; 3X growth in 12 months.

**Senior Director Product Sales, 2000 to 2003**

**Siebel Systems - CA**

* Initially hired as a Product Specialist to market the Siebel PRM solution. Promoted to Area Sales Manager Western Region, then Senior Director
* Exceeded closing $100M in Siebel license revenue on the Microsoft .NET platform to end user named accounts
* Managed a worldwide 10 person sales alliance team
* Drove strategy, alignment & sales execution with Microsoft, HP, Accenture & Cap Gemini, to close business in strategic Fortune 1000 accounts.

**Education**

**B.S.** Business Administration & Marketing

**San Jose State University**

**Accomplishments**

* Managed teams of up to 10 Sales and/or Sales Associates
* Presidents Club (s)
* Retail Awards for consistent performance