

# Omar Al-Bakri

## Strategic Account Executive | Banking & Financial Services | FinTech | SaaS

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### INTRODUCTION & OVERVIEW:

Highly motivated and adaptable sales executive with a 15+ year record of accomplishment in driving revenue growth across diverse industries, including banking, financial services, FinTech, and SaaS. Proven ability to quickly learn new products and markets, leveraging transferable skills in relationship building, strategic thinking, and problem-solving to consistently exceed quotas, develop new territories, and cultivate strategic partnerships for accelerated growth.

Passionate about staying at the forefront of industry trends, with hands-on experience in cloud computing, AI, and app development. Adept at collaborating with cross-functional teams to enhance customer acquisition and drive innovation, and well-honed interpersonal skills. Seeking to bring a unique blend of sales excellence, adaptability, and technical expertise to a dynamic, growth-oriented organization.

*"Driven by an innate passion for technology driven solutions, I am eager to leverage my 15+ years of sales excellence to accelerate growth and achieve key milestones. My strategic approach, deep understanding of client needs, and commitment to building strong partnerships consistently deliver outstanding results. A focus on transparency, collaboration, and relentless value creation are important values to foster success."*

### KEY SKILLS & ACHIEVEMENTS:

#### Extensive Sales Experience in Banking, Financial Services and Fintech:

- Over 15 years of experience working for and selling into the banking and fintech industry, with a strong background in coverage and relationship management roles at leading global banks, including Bank of America and BNP Paribas.
- Leverages deep understanding of financial markets, banking infrastructure, and the unique challenges faced by global financial institutions to identify opportunities for innovative technology solutions, such as storage, data management, cloud, and AI.

#### Building New Territories and Securing Major Deals

- Successfully built out new territories in the UK and EMEA, leveraging a strategic approach to prospecting and relationship building.
- Adept at winning new clients across a broad range of industries, highlighted by generating 5x new opportunities through strategic prospecting and targeted lead generation campaigns.

#### Securing Major Deals & Winning New Accounts:

- Demonstrated dedication and integrity in building long-term relationships with key decision-makers in the financial services sector.
- Expert at handling the end-to-end sales cycle and navigating complex negotiations. Secured a £1M deal with a leading global bank, demonstrating the ability to create mutually beneficial outcomes and drive revenue growth in new markets.

#### Collaborative Approach to Improving Sales Cycle:

- Collaborated with cross-functional teams, including product, support, and sales engineering, to identify and implement improvements to the sales development cycle, resulting in increased efficiency and accelerated customer adoption.
- Developed and executed targeted lead generation campaigns, providing momentum around campaign delivery and consistently exceeding KPIs by employing engaging communication skills.

#### Proactive Customer Engagement

- Drove a 50% reduction in onboarding time and enhanced client payment volumes by 30% through continuous engagement, data analysis, and a deep-seated commitment to improving customer satisfaction and success throughout the sales cycle.
- Proactively engages with customers to understand their unique needs and challenges, leveraging insights to develop tailored solutions that drive business value and foster long-term relationships.

## **PROFESSIONAL EXPERIENCE**

### **FOUNDER / DEVELOPER**

#### **PayFac.ai, Timelineai.co, Ecofootprint (Personal Projects)**

Oct 2023 – Present

Passionate about cutting-edge technology, IoT and continuous learning, I dedicated the past 6 months to self-directed study and hands-on development in AI, machine learning, and innovative software. During this time, I have started four projects below, completed a python bootcamp and the online course through y-combinator school for startups, whilst also expanding my network:

- PayFac – An AI-powered payment gateway that enhances transaction processing and customer interactions for businesses.
- Timeline|Ai – A self-improving AI NLP calendar management assistant that streamlines scheduling and boosts productivity.
- Ecofootprint – An application that helps users measure and reduce their carbon footprint, promoting sustainability.
- Crypto and FX Price Prediction Bot – Utilizes machine learning and AI to provide accurate predictions for cryptocurrency and foreign exchange markets.

### **SENIOR ACCOUNT MANAGER**

#### **BANKING CIRCLE - LONDON, UK (FINTECH SAAS – P.E. BACKED)**

March 2023 – September 2023

- Achieved 120% of the yearly sales by the half year doubling MoM revenue to €500k, by driving a front and centre approach to client relationships.
- Using Salesforce data, developed an innovative payment solution which effectively provided a mechanism to incentivise clients to use additional products, further deepening relationships and initiating a way in which to give back to clients
- Successfully boosted customer success and satisfaction by 25%, by reducing overall onboarding time by almost 50%. effectively implementing a focus on being the voice of the customer internally.
- Spearheaded a client portfolio expansion strategy that resulted in a 35% revenue increase by identifying key pain points with existing clients, fostering lasting relationships through exceptional account servicing.

### **HEAD OF BANK SALES, PAYMENTS, FINANCIAL INSTITUTIONS, EMEA (01/2022 – 02/2023)**

#### **CONVERA - LONDON, UK (FINTECH SAAS PAYMENTS)**

February 2022 – February 2023

- Secured a 5x increase in qualified sales opportunities within the major banks space, exceeding annual targets and establishing a strong pipeline for future growth.
- Closed a £1M deal with a top-tier financial institution, strategically leveraging data analytics to identify key pain points and negotiate a solution that delivered exceptional value to the client.
- Built strong rapport with key decision-makers at 10 major banks, positioning myself as a trusted advisor.

### **SENIOR BUSINESS DEVELOPMENT MANAGER, FI (02/2021 – 12/2021)**

#### **CONVERA - LONDON, UK (FINTECH SAAS PAYMENTS)**

February 2021 – February 2021

- Accelerated merchant acquisition by forging strategic partnerships with key industry players, expanding our reach into new markets, and significantly increasing the merchant base.
- Built a strategy for the EMEA banks business through a mechanism of collaboration and customer alignment, driven by a steadfast rule of holding a min 30+ key stakeholder and client meetings per month.
- Facilitated cross-functional collaboration between internal teams, streamlining processes and improving client satisfaction by 20%.
- Delivered insightful presentations at industry events, enhancing brand reputation, and attracting new business opportunities.

### **EARLIER ROLES SUMMARISED:**

Relationship Manager/Analyst/Associate at global banks (Bank of America, BNP Paribas) and executive search experience

### **EDUCATION:**

- Python 3 Software Developer Bootcamp, HyperionDev (10/2023 - 03/2024)
- B.Sc. (Hons) Physiology/Pharmacology, Nottingham Trent University