

Sam Schuemacher

Solution Consulting & Sales Engineering Leadership | Microsoft 365 & Cloud | Regulated Financial Services
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SUMMARY

Solution consulting leader with ten years of progressive experience at a PE-owned managed service provider serving regulated financial services clients. Led a five-person Solution Consulting team, carried the company MRR/NRR/OTC quotas, and achieved a 30% net-new win rate across financial services opportunities. Led discovery, solution and commercial design, Microsoft 365 licensing strategy, and executive proposal development for cloud, cybersecurity, identity, data governance, and professional services engagements. Served as technical lead on a \$4.2M ARR enterprise agreement covering 600+ customers and co-authored a Microsoft 365 Copilot readiness and governance framework for regulated clients.

CORE SKILLS

Solution Consulting & Pre-Sales: Consultative Discovery, Stakeholder Mapping, Current-State Environment Review, Solution Architecture Co-Design, Solution Scoping, Commercial Packaging, Proposal Development, Pricing & Configuration, Executive Presentations, RFI Response, Cross-Functional Deal Execution

Cloud, Microsoft & Security: Microsoft 365 Licensing & Tenant Management, Public & Private Cloud, Identity & Access Management, MFA, Conditional Access, Zero Trust, BCDR, Microsoft 365 Copilot Readiness & Governance

Managed Security & Portfolio Strategy: Service Portfolio Rationalization, RMM, MDR, SIEM, Third-Party SOC Service Models, SaaS Backup, Competitive Analysis, Sales Enablement

Leadership & Delivery: Solution Consulting Team Leadership, Professional Services Packaging, Technology Roadmaps, Statements of Work, Implementation Planning, Service Delivery Handoffs

PROFESSIONAL EXPERIENCE

Independent Consultant | Remote

Mar 2026 – Present

AI GTM, Microsoft Marketplace and Partner Strategy

- Advise early-stage technology companies on go-to-market strategy, enterprise buyer needs, and commercial value positioning.
- Configured Azure Marketplace listings, private offers, and transaction workflows for early-stage software clients.
- Directed production deployment of a Claude-based multi-agent "virtual C-suite" workflow that routes Slack- and Claude-initiated requests across specialized agents for contract review and drafting, competitive analysis, product positioning, code review, and sales-content development; standardized brand-guideline adherence, reduced manual rewrites, and cut first-draft content-development time by approximately 90% for the primary user.

Visory, formerly Swizznet | Remote

Mar 2016 – Mar 2026

Four promotions in ten years, from Inside Sales Account Manager to Senior Director.

Senior Director, Solution Consulting

Jan 2025 – Mar 2026

- Led a five-person Solution Consulting team while carrying the company revenue quota, with a 30% net-new win rate across financial services opportunities.
- Led discovery, stakeholder mapping, and current-state environment reviews for complex client opportunities, translating business needs, technical constraints, and operational concerns into solution and commercial recommendations.
- Co-designed public and private cloud solution architectures with solution engineers, the CTO, engineering, system administration, and Microsoft technical resources; shaped Microsoft 365 licensing, tenant management, identity, data access, security, BCDR, and implementation recommendations.
- Led commercial scope, service packaging, proposal development, pricing and configuration models, solution diagrams, statements of work, technology roadmaps, and executive presentations for complex client and professional-services engagements.
- Presented and defended solution recommendations with C-suite, finance, legal, compliance, and internal IT stakeholders, positioning Visory as a collaborative partner alongside client IT teams.
- Led recurring formal private-cloud proof-of-technology engagements to address client cloud-adoption and user-experience concerns: defined pilot scope, coordinated Engineering and System Administration buildout,

managed the client handoff, and transitioned successful pilots to onboarding, multi-year contracts, and expansion.

- Planned implementation approaches and led handoffs to Service Delivery and onboarding teams, aligning solution scope, client expectations, technical dependencies, and deployment planning.

Director, Product and Solutioning

2023 – 2025

- Served as the consultative technical lead for the company's largest enterprise agreement, \$4.2M ARR, covering 600+ customers.
- Owned the Microsoft 365 Copilot readiness and governance initiative and its output for regulated financial services clients, and co-authored the framework covering architecture validation, security, compliance, information governance, and deployment readiness.
- Established and led the Technical Account Management function, the day-to-day liaison between clients, engineering, product, and support.
- Owned consolidation of four companies' fragmented service portfolios (the core company and three acquisitions), inventorying offerings, coordinating vendor comparisons and service definitions, and guiding executive decisions on packaging, bundling, scalability, supportability, and commercial viability.
- Reduced hundreds of individual SKUs to a unified portfolio of fewer than three dozen service offerings, built the NetSuite SKU-cleanup plan, and introduced pre-approved pricing levers by volume and commitment term, reducing pricing exceptions and improving margin visibility and quoting consistency.
- Led portfolio-level enablement for managed security and resilience offerings, including RMM, SentinelOne-based MDR, SIEM alerting supported by a third-party SOC, filtering, zero-trust technologies, and SaaS backup, delivered virtually and in person to Sales, Support, Operations, Engineering, executives, Client Success, and channel partners.

Product Manager, Sales Enablement

2021 – 2023

- Expanded Visory's partner certification and competency program, partnering with cross-functional managers and C-suite sponsors on incentive design and positioning.
- Built vertical-specific solution frameworks and demo templates for wealth management and accounting pre-sales, cutting new-hire ramp time by 50% across a 12-person pre- and post-sales organization.

Senior Manager, Sales and Client Success

2019 – 2021

- Built the Client Success function, formalizing onboarding, renewal governance, and lifecycle engagement.
- Scaled a partner-led sales motion that generated approximately 60% of new deals across direct and channel-sourced revenue.

Inside Sales Account Manager

2016 – 2019

- Managed full-cycle SMB and mid-market sales and designed a two-day Partner University onboarding workshop for channel partners.

PRIOR EXPERIENCE

Sykes Enterprises | Customer Care Supervisor | Remote | 2014–2016. Led high-volume contact center operations, introduced chat support, and reduced average resolution time by 25%.

Aaron's Sales and Lease Services | General Manager | West Palm Beach, FL | 2006–2010. Managed location operations and staff, improving profitability by 28% in under a year.

EDUCATION

Master of Business Administration, Project Management - Louisiana State University Shreveport

Certificate in Product Strategy - Kellogg School of Management, Northwestern University

Bachelor of Arts - Florida Atlantic University

CERTIFICATIONS

Microsoft Certified: AI Transformation Leader, 2026

Microsoft Certified: AI Fundamentals (AI-901), 2026

Microsoft Certified: Azure Fundamentals (AZ-900), 2026

Microsoft Certified: Security, Compliance, and Identity Fundamentals (SC-900), 2026

NAASE Certified Sales Engineer (CSE), 2026

Salesforce Agentblazer Champion, 2026

Certified Customer Success Management Professional (CCSMP), Level 2, 2026