

The Hartford, Greensboro, NC
Executive Sales Representative—Small Commercial (October 2021 to present)
Senior Sales Representative—Small Commercial (July 2017 to October 2021)

Responsible for the Region's largest territory and VIP agencies. Manage a \$30M total written premium book and responsible for identifying \$4M in new Small Commercial business. Identify and build relationships with key producers, account managers, and agency leadership at McGriff, Marsh & McLennan (MMA), and other independent agencies. Leverage profit sharing, commission incentives to win and retain more business. Train producers and account managers on The Hartford's suite of technology products, including their rating platform and policy management center.

Accomplishments:

- Achieved new business plan for three consecutive years: 109% in 2022, 106% in 2021, and 102% in 2020.
- Grew McGriff's Sales Center new business by 15% in 2022 and 6.5% in 2021.
- Helped bring in and manage a combined \$3M in book consolidation premium starting in 2017 to present from both McGriff and MMA.
- Secured over \$100K in liquor store workers compensation premium in 2024 from an independent agency.
- Secured over \$300K in trampoline park WC since June 2024.
- Secured over \$500K in hotel workers compensation premium in 2018-present from a McGriff office that historically did not produce with The Hartford.
- Identified and established a restaurant program with McGriff Sales Center that resulted in over \$350K in new written premium in 2020.

The Hartford, Greensboro, NC
Manager, Agency Appointments Department (December 2015 to July 2017)

Managed a staff of five that were responsible for vetting, interviewing, recommending, and setting up agencies for a Hartford appointment. Regularly met with field management and senior executives on new appointment production performance as well as on special assigned projects. Monitored the production performance of new Master codes and large aggregator Sub code appointments, and closely worked with the field on rehabilitating or terminating non-performing agencies. Collaborated with the Data Analytics and Salesforce team to ensure production data are accurate prior to reporting out to senior field and home office leadership.

Accomplishments:

- Executed vision of transforming the team to be more sales focused by redefining job duties and taking on more revenue generating sales projects.
- Recommended and received senior management signoff on implementing a countrywide minimum production guideline for all aggregator sub code appointments.
- Collaborated with Marketing to create email templates that resulted in delivering a consistent and professional message as well as reducing the time new appointments are set up by an average of 2 days.
- Worked with the Data Analytics team to redesign the team's Dashboard Report that provided a clearer snapshot of assigned projects and performance.

The Hartford, Greensboro, NC
Senior Sales Representative—Small Commercial (February 2011 to December 2015)

Through a telephonic model, managed an \$11M Small Commercial territory that consisted of 100 independent insurance agencies in Michigan, Ohio, and Indiana. I was responsible for ensuring a profitable book, strong retention, and identifying over \$2M in new business. Appointed new agencies and took action on non-performing ones. Traveled quarterly in the territory to build and maintain relationships and to identify new and renewal business opportunities.

Education:

MBA in Risk Management & Insurance—Olivet College, May 2017
B.S.B.A., Management—John Carroll University, May 2002

Professional Designations and Licenses:

Certified Insurance Counselor (CIC)—2021
Chartered Property and Casualty Underwriter (CPCU)—2014
Accredited Advisor in Insurance (AAI)—2008
North Carolina Property and Casualty Insurance License—2006

Board Membership, Professional Development, Associations and Volunteerism:

The Hartford's Sales Counsel—2018-Present
Thunderbird School of Management CPCU Leadership Summit Certification—2022
Piedmont Triad CPCU Society chapter board member—2020-2024
Board member at Junior Achievement of the Triad—2016 to 2022
The Hartford's Leadership Foundation Manager Training—2016-2017
Department co-chair for Annual Giving Campaign at The Hartford—2016
The Hartford's Launching Leaders Training—2014-2015