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Mission First, People Always leader focused on creating customer success stories internally and externally.

Leadership: Sales: Business Development: Account Management: Product Development: Marketing

New & Existing Customer Strategy & Stewardship + Self-Funded Medical, PBM/Rx, Stop Loss, Captives and TPA Expertise+ Dental, Vision and Ancillary lines Expertise + Underwriting & Analytics + Creative Problem Solving

Building Positive Culture of Execution & Winning + Strategic Planning and accompanying Tactical Planning + Staff Development & Talent Acquisition + New Product Development & Accompanying Marketing Strategies for product release + Voice of the Customer (VOC) engagement on new products/tools + CRM Expertise & Administration

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Execution oriented professional with 25 years of success leading teams and organizations in the employee benefits/property & casualty insurance group products and agency operations, technology and finance industries with a strong record of rapid growth in revenue, profitability and customer success. Deep expertise, business acumen, and natural curiosity for providing solutions to customers that fulfill their needs at an organizational level. Apply powerful blend of leading by example/influence, fostering consensus and collaboration, and always keeping the customer's needs at top of mind.

- Lead efforts of sales and service team on a $ 3.5 million dollar book of business in the employee benefits agency market.
- Created organizational strategy & tactical plans around new product release, business development and voice of the customer retention planning that lead to an increase from $425 million to $700 million in health care purchasing in 5 years in an extended period of hyper growth in a highly competitive marketplace.
- Developed requirements and roadmap for RFI/RFP knowledge base, competitive information that lead to an increased close ratio of 15% and generated $1 million in new business in the first eight months.
- Served as subject matter expert on employee benefits plan performance when meeting with Boards, CXO's, Public Entities and Sovereign Nations. Broad spectrum of clients from large multi-state self-funded to mid-market fully insured.
- Rapidly grew large books of business at regional and international insurance agencies through work ethic, integrity, knowledge, passion, personality and professionalism.
- Product design for provider based centers of excellence for IP/OP schedulable procedures, leading to better patient outcomes and lower claims costs.

Professional Experience

Quartz, Director Self-Funded Sales Sep 2021-Nov 2022

- Leadership, vision and strategy driving growth in the Quartz Align Self-Funded product.
- Defined, developed and collaborated with Product Department on Self-Funded offering to enhance Quartz' brand in the market.
- Drove the RFI/RFP process and selection of vendors for Third Party Administration, Stop Loss, and PBM services for the Administrative Services Only line of business in self-funding.
- Lead cross functional business development efforts in all key markets for Quartz Align and owners at UW Health-Madison, UW Health-Rockford, Advocate Aurora Health-Milwaukee and Gundersen Lutheran Health-Lacrosse. Ensuring all Provider/Owner direct to employer products were part of the customer value narrative with Quartz Align.

- Trained sales team and account managers in self-funding, value proposition and customized messaging to align with customer characteristics, key metrics that define an organizations preference on funding their claims.
- Worked extensively with Agent/Broker Leadership and Agents on training on the Quartz Align product, quoting process, and value proposition for employers.

Gallagher, Area Senior Vice President, May 2019-April 2021

- Leader/Producer with leadership responsibilities for junior brokers, service and account management team, and producing new profitable business in the private, public, and sovereign nation markets.
- Optimized Salesforce.com by streamlining necessary steps for producers using as a time management and opportunity tracking tool. Cut down input time by 50% lead to increase in new business meetings by 25%.
- Lead stewardship planning, preparation and meetings with CXO's, Tribal Governments, Boards and Public Sector Committees. Used data, shared values and ROI to encapsulate plan and carrier performance.
- Worked closely with carriers to ensure new customers were implemented properly and set up for long term success with carrier team based off the value their team brings to the table.
- Led M&A transitions of acquired assets in their final years of buyout. One specializing in Retirement, Life Insurance, the other in STD, LTD, Group Life and other non-medical products.

Professional Experience

Cottingham & Butler, Sales Manager Employee Benefits Consultant, AUG 2017-May 2019

- Direct and mentor junior brokers new to the industry. Created a training program for understanding how insurance works, funding methods for medical, dental, pharmacy and non-medical lines. Developed a plan for activity and presentations that led to all teammates hitting their revenue goals and one of them achieving the 100% club for new business growth. Role played with junior brokers to help them become consultative salespeople who can listen to customers' needs and deliver innovative solutions. Provide broad based recognition by recognizing positive behaviors, achievements, and results exhibited by team members and all staff at all levels across the organization in a consistent and professional manner.
- Created a matrix for understanding the voice of the customer allowing our sales executives to better serve the needs of employers and their employees in a highly competitive employment market. This led to an increased closing ratio of 24% once we make it to the presentation state of the sales cycle.
- Consult with Practice Leader on brand strategies in our market. Utilizing both push and pull marketing we have grown in our number of referenceable clients and the size of our new clients from small to mid-market to mid to large market.
- Engaged and closed large group business in several verticals including; private sector, public sector sovereign nations, and private equity. Utilized personal brand, relationships and team selling concept to understand client's needs, help them address blinds spots in their health plans and deliver innovative solutions in a timely and accurate manner. This coupled with a proactive annual engagement strategy with the employer and creating one with the employer for their employees has led to retention of over 98% in my book of business.

The Alliance, Business Development, OCT 2011-AUG 2017

- Develop/plan/execute business development plan aligned with corporate strategic planning, for new members, new markets and innovative products for public, private and union employers. Identify areas for new products; contribute to internal multifunctional teams to take projects/products from concept to market.

Membership in the cooperative has increased from 180 members and 70,000 lives to 240 member companies and 110,000 lives averaging 12% growth during the past five years under my leadership of business development and member services.

- Lead business development, and marketing strategies for The Alliance in three separate distribution channels; agent/broker, third party administrators, and employers throughout the geographic region of Wisconsin, Illinois and Iowa. Mentor broker/agent community in the advantages of self-funding as a long term strategy, educate who all the players in a self-funded arrangement are, and how to evaluate and present self-funding to their clients/prospects. Collaborate with third party administrators on Alliance innovations and products for employers and analyze claims and demographic data to show Alliance membership benefits for employers.
- Assess strengths of business development and member services team, understand areas for improvement and created a plan for training/education to increase individual and organizational credibility in the marketplace.
- Advise employer groups by identifying business needs and understanding long term strategies for employee health benefits solutions. Areas of expertise include health insurance fully insured and self-funded plans, alternate funding plans, value based benefit design, wellness programs, HRAs, HSAs, FSAs, dental insurance, life insurance, short and long term disability, stop-loss insurance, and property and casualty protections. Extensive knowledge and understanding of partnership between underwriting-business development-account management and end customer and how to cultivate these relationships to maximize efficiency and customer satisfaction.

Education

1997 University of Wisconsin Madison

- Economics

2017 Upper Iowa University, Madison, WI

- Bachelor of Business Administration. (Cum Laude)

University of Wisconsin Madison, School of Business Executive Education Fluno Center.
2014 Professional Certificate in Sales Management
Courses:

- Executive Leadership in Sales Management
- Effective Sales Management
- Business Acumen and Strategy for Managers
- Go-to-Market Channel Design and Management

2016 Leadership Beyond Management Executive Training
Focus of Training:

- Impact the performance of others through your authentic and purposeful leadership
- Read organizational context in order to successfully lead
- Identify key contextual issues in the workplace that impact productivity and performance
- Increase awareness of organization context and culture, allowing more thoughtful response to rapid changes in business circumstances
- Ability to lead intentionally via key foundational, situational, and strategic

leadership competencies
- Investigate how the best leaders design their organizations for success

Professional Groups Sales/Management/Industry Certifications/Boards:
- Middleton Community Veterans Tribute Board, Business Planning/Secretary
- Certified Self-Funding Specialist, HCAA, 2012 (one of 518 in United States).
- Disability Insurance Associate Certification 2010, AHIP and NAHU
- Published in 2015 HealthCare Consumerism All Stars Article on Employers Getting What They Want from Self-Funding
- Speaker at Wisconsin State SHRM Conference on Self-Funding 2016
- Cisco Systems Enterprise Account Management
- IBM Signature Selling Method
- Bosworth's Solution Selling
- Achieve Global Selling Strategies, Leadership Development and Selling in a Competitive World
- Shapiro Negotiations Institute "The Power of Nice" negotiations methodology
- STAR (System to Achieve Results) Sales Management
- Spin Selling (Rackham)

Currently hold State of Wisconsin Property and Casualty, Life and Health Insurance licenses. I am member of the Independent Insurance Agents of Wisconsin, Professional Insurance Agents of Wisconsin.

Military Experience

1990-1999
- Active Duty: Served in Operation Desert Shield/Storm, Airborne Infantry.
- Served two and one half years active duty, and seven in Wisconsin Army National Guard. Promoted on fast track due to character and competence.
- Awarded various commendations, medals, and honors.
- Commander of Middleton Veterans of Foreign Wars Post 8216. 2010 Nominated and Elected Junior vice Commander, 2013 Nominated and elected Senior vice Commander. Commander since 2016
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Interests

Exercise, reading, music, outdoor sports.