

# BERNARD SMITH

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## FIELD OPERATIONS / MARKET DEVELOPMENT EXECUTIVE

**Building high-performance organizations centered on productive, motivated teams**

Driving successful turnarounds by intensifying focus on business opportunities, change management, consultative sales, stakeholder relations, and strategic business planning

Operational and team performance champion credited with increasing revenue and productivity for challenged business units, motivating matrix teams through analytical, big-picture view of potential opportunities. Perceptive, versatile executive strategist who builds consensus, cuts costs, and enhances staff motivation.

### Employee Performance & Leadership

Enhanced productivity, using systematic approach to create high-output, positive work cultures with strong levels of accountability, consensus, and ownership.

### Team Motivation & Development

Enhanced employee growth/communications during volatile post-merger period, creating first 30/60/90-day development plans that drove top performance.

### SELECTED OPERATIONAL & REVENUE RESULTS INCLUDE:

- ▶ **Positioned firm for strategic growth** as Vice President - Field Operations, securing 100% increase in leads with increased quoting activity for new lines of business. Surpassed profit/production goals, pulling in marketing and underwriting resources to maximize offerings and cross-promotions.
- ▶ **Boosted profits 200% over 3 years**, with 20% rise in revenue and 40% new business by raising productivity through creation of 1- and 2-year strategic business plans for 4 regions.
- ▶ Continually increased revenue by envisioning and launching first-in-kind leadership development programs, mentoring staff in consultative selling techniques, and creating strategic business plans.

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## PROFESSIONAL HISTORY

### Planned Sabbatical & Strategic Leadership Consulting, 2008—Present

*Supported business/program development in tandem with Boards and Directors of nonprofit foundations.*

### Travelers Insurance, Denver, Colorado, **1996—2008**

*Rose through executive roles of expanding scope to oversee \$345M, 75-employee field operation, leading charge to increase shareholder value, optimize productivity, and leverage product offerings via cross-selling opportunities during period of rapid growth.*

### **VICE PRESIDENT - FIELD OPERATIONS, 2005—2008**

Key executive strategist and influential leader for behavioral changes throughout field, with oversight of all P&L and \$10M operating budget for Public Entity division. Directed 7-member staff including Regional Vice Presidents plus Director Indian Nation Business and underwriting/territory management reports. Analyzed field metrics plus forecasts to assess pipeline and tracked backroom activity to measure impact.

- ▶ **Instrumental in growing leads 38%** with 15% rise in new business and 90% retention, securing 61% YOY quotation increase despite economic challenges with focus on existing accounts/cross-selling.
- ▶ Reinforced accountability and stakeholder centricity, **creating first-ever Balanced Scorecard** used as model in other business units for strategic planning with field operations metrics spanning employee, product, production, and financial data. Shared concept across divisions with executive peers.
- ▶ Focused on distributors generating 27% of income; grew revenue 40% by nurturing agent relations.
- ▶ Impacted sales across all sectors with focus on SWOT analysis to identify unprofitable vs. growth areas.

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### VICE PRESIDENT - FIELD OPERATIONS, CONTINUED...

- ▶ Led key leadership behavioral change (with ~40% improvement in organizational health) by launching high-performance culture-centric workshop that empowered leaders to create conflict resolution methods.
- ▶ Built trust among staff during volatile post-merger phase, fostering communications with new intranet site.
- ▶ **Addressed 50% forecasted turnover** with strategic plan to identify top-tier management development candidates; standardized accountabilities field-wide and groomed 15 employees for leadership promotions.
- ▶ Expanded Indian Nation business, centering relationship on culture and lobbying in Washington for support.
- ▶ Promoted charitable support, **gaining 50% YOY rise** in contributions with executive fundraising project.

### REGIONAL VICE PRESIDENT – MIDWEST REGION, 2004–2005

Established reputation for top performance leading to next promotion, working in tandem with executive leadership to improve sales training, handle post-merger business integration, and add productivity monitoring measures. Led 25-member staff producing 40% of Public Sector revenue.

- ▶ **Worked closely with Vice President - Field Operations** as appointed post-merger integration team member chartered with identifying niche businesses and communicating with unit leaders throughout transition. Addressed overlap, combined books of business, and assessed best practices for forms/claims.
- ▶ Streamlined onboarding process for new/existing territory sales managers, developing region's first training guide that delineated workflow and enhanced relationship-building techniques.
- ▶ Effected cultural shift for underwriters to sales and relationship-building perspective.
- ▶ Improved sales closing ratio with creation of monitoring tool for detailed sales reporting.

### REGIONAL VICE PRESIDENT (MULTIPLE REGIONS), 1996–2004

Brought in to manage half of U.S. Public Entity business units after expanding new Manufacturing segment 22% through new product lines and producer relationships. Held authority for regions ranging from \$30M-\$80M, managing up to 25 field sales representatives.

- ▶ **Turned around unprofitable region** to create top performer, identifying troubled markets for exit among 8 field offices and centralizing underwriting function into 2 facilities.
- ▶ Created cost model among first in company and used as standard throughout regional offices.
- ▶ Preserved 84% of business during post-acquisition integrations; subsequently increased profitability 35%.

**CNA Insurance**, Chicago, Illinois, 1995–1996

*Top writer achieving nearly \$300K in new business.*

### UNDERWRITING DIRECTOR

**ING Insurance**, Trenton, New Jersey & Los Angeles, California, 1986–1995

*Added pricing strategies while growing lines of business for accounts generating \$1M+; trained field staff and underwriters in risk management and pricing concepts.*

### RISK MANAGEMENT / HOME OFFICE CASUALTY UNDERWRITER; PRODUCT SPECIALIST

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### EDUCATION & SPECIALIZED TRAINING

**BACHELOR OF SCIENCE – Organizational Leadership & Management**  
**University of Denver**, Colorado

Miller Heiman Strategic Selling; The Leaders Window

**The Leadership Challenge** (Kouzes and Posner); **Executive to Leader Institute** (LeaderSource)