

**David Jones** 

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# **QUALIFICATIONS SUMMARY**

An innovative sales leader with over 7 years of experience in a consultative sales environment. A proven sales leader consistently hitting and succeeding sales territory goals within assigned territory. Offers a track record of success in a variety of complex and challenging environments including strategic sales and channel partnerships, market growth opportunities, corporate consultations and financial technology. Blends business acumen with technical sales knowledge to develop and lead innovative, collaborative, and value-driven solutions that advance the goals, mission and overall performance of an organization. Excels in building strategic client partnerships in B2B and B2C sales environments. Opens new opportunities and revenue potential through methodical research and analysis. Promotes team collaboration and cohesiveness through personalized mentorship and development opportunities.

#### AREAS OF EXPERTISE

Business Development Product Knowledge Marketing Campaigns Excellent Presentation Skills Relationship Management Territory Management Strategy Development SalesForce Partnership Development Revenue Growth Financial Technology Market Research

## PROFESSIONAL EXPERIENCE

VP, Strategic Account Executive Hexure (Insurance Technologies), Colorado Jan. 2024 - Sept. 2024

- Develop and execute strategic pipeline development strategies to drive adoption and usage of Hexure's SaaS platform among small distribution Broker General Agencies (BGA's) in the Life and Annuity space.
- Manage a sales pipeline proactively and methodically to keep a steady and growing sales volume.
- Obtain a deep understanding of Hexure's products and processes.
- Present and demonstrate Company products and services to clients ultimately leading to sales engagements.
- Travel to and participated in Industry events, working groups and associations to build networks as well as the Company's reputation as an industry expert.

Independent Broker

Compass Insurance Advisors, Utah

May 2023 - March. 2024

- Lower Benefit Package costs for Small, Mid, and Large-sized employer groups.
- Keep clients compliant with State and Federal Laws.
- Sell Individual Products with Life, Dental, Vision, and many other ancillary benefits.

Large Group Benefits Consultant Brown and Brown Insurance, Utah

Jan. 2023 - Apr. 2023

- Prospected broker leads through in-person, email, and phone outreach.
- Provided strategic consulting, analytics, and compliance support to mid-market employers, developing innovative health & benefits solutions.
- Leveraged technology solutions to streamline enrollment and engagement, minimized risk and health insurance costs using strategic consulting, analytics, compliance, and customer support strategies.

- Managed a book of business over \$500,000+ in premium, maintained 100% of existing client renewals.
- Prospected broker leads through in-person, email, and phone outreach, generated \$150k new revenue.
- Onboarded & trained new broker partners to sell company products and services to their clients.
- Led the implementation of CRM and Lead-Gen Marketing Software for Sales Business Development.
- Collaborated with the marketing team on email advertising campaigns, marketing materials, lead engagement and follow-up activities resulting in 98% increase of new RFP's.

Inside Sales Executive

HealthEquity, Utah

July 2017 - July 2021

- Provided national sales support through inbound/outbound marketing efforts with brokers, consultants, employers, and health plan partners.
- Generated 4000+ accounts over 4 years, resulting in an est. 2.4million in total lifetime assets under management.
- Nationally presented employee benefit solutions for large group clients at annual open enrollment meetings and benefit fairs for participating employee base.
- Played a key role in market share expansion and communication about new business implementations.

Area Sales Rep

CanadaDirect, Canada

Jan. 2016 - Aug. 2016

- Provided Lead-Gen SAAS sales and territory account development across the US and Canada.
- Managed a sales pipeline over \$500k and generated \$150k in closing in a single month.
- Participated in the design of Marketing PowerPoint Presentation materials.

#### **EDUCATION**

Bachelor of Science - Utah Valley University - May 2009

#### **CERTIFICATIONS / LICENSES**

- FFM and ACA Health Certified, 2023
- MetLife University's Employee Benefit Solutions Certification, 2023
- Accident, Life, Health & Sickness Utah License, 2022
- HSA Expert by HSA Consulting Services LLC, 2019 2023

### **ACCOMPLISHMENTS**

- Active Health, Accident, Sickness & Health License in Utah
- Grew RFP submissions 98% and achieved 100% existing client renewals, 2022
- Set up CRM and LinkedIn Automation, and established MBA market presence, 2021
- Received Quota Club recognition 3 consecutive years for exceeding annual sales goals, 2019-2021