

Personal details



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Results-driven sales leader with 10+ years of experience owning revenue targets, building high-performing pipelines, and closing complex deals across financial services, insurance, and market research. Proven track record of exceeding quota, expanding high-value accounts, and driving double-digit revenue growth through outbound prospecting, consultative selling, and strategic account development. Skilled in leading full-cycle sales motions—from discovery and solution positioning to negotiation and close—while engaging senior stakeholders across PE firms, consulting groups, and enterprise clients. Adept at leveraging sales technologies to accelerate pipeline creation, improve forecasting accuracy, and drive repeatable growth.

Employment

PROJECT MANAGER, CLIENT SERVICES

2024 - Present

[Third Bridge, Dallas, TX](#)

- Owned revenue targets and drove **100%+ YoY growth** across strategic consulting and private equity accounts by executing targeted outreach campaigns and expanding share-of-wallet.
- Generated **\$450K+ in gross profit** by qualifying opportunities, scoping projects, and aligning solutions with client needs.
- Built and managed a **high-velocity outbound pipeline**, engaging 100+ industry experts and converting them into qualified project resources based on client requirements.
- Partnered closely with senior consultants and investment teams to identify opportunities, shape demand, and position Third Bridge services as critical decision-support solutions.
- Leveraged CRM and data tools to track engagement, forecast revenue, and increase account penetration by **60%**.

ACCOUNT MANAGER

2020 - 2024

[Travelers, Dallas, TX](#)

- Held full revenue responsibility for a **\$15M+ book of business**, driving **15% YoY growth** through strategic upsells, cross-sells, and retention plays.
- Exceeded monthly and quarterly sales quotas consistently, earning promotion after surpassing targets for **6 consecutive months**.
- Led **outbound prospecting** to expand footprint within accounts, uncovering new use cases and accelerating adoption.
- Maintained **70% YoY retention** by conducting consultative discovery calls with decision makers to identify gaps and present tailored solutions.
- Monitored product usage analytics to proactively re-engage inactive customers and increase overall engagement.

BUSINESS DEVELOPMENT MANAGER

2018 - 2020

[Farmers Insurance, Independent Agency, McKinney, TX](#)

- Ran full-cycle sales motions — prospecting, qualification, solution presentation, and closing — achieving **10% YoY revenue growth**.
- Leveraged CRM pipelines, forecasting tools, and data analytics to identify at-risk accounts and prioritize high-value opportunities.
- Built and maintained executive relationships while increasing retention by

20% through consultative outreach and tailored solutions.

- Delivered high-impact value propositions and presentations to accelerate close rates and expand the client base.

ACQUISITIONS MANAGER

2016 - 2018

Five Oaks Investment Manager, Dallas, TX

- Generated and qualified a pipeline of investment opportunities exceeding **\$15M+**, contributing to a **10% portfolio expansion**.
- Led end-to-end deal sourcing, stakeholder outreach, discovery, and financial analysis to drive acquisition decisions.
- Presented opportunities to senior leaders, influencing buying decisions and advancing deals through each stage of the pipeline.

Education

Business Management

University of North Texas, Denton, TX

Business Administration - Associates Degree

South Plains College

Key Skills

Key Sales Skills

- Enterprise Sales
- Consultative & Value-Based Selling
- Outbound Prospecting
- Pipeline Generation & Forecasting
- Stakeholder Management (C-suite, Consulting, PE, Finance)
- Discovery & Needs Analysis
- Negotiation & Closing
- Account Expansion & Renewals