

Lisa Jackson

Insurance Sales

Independent agency owner with 19 years in the industry, including nine running my own shop. Agency writes personal lines, small commercial, and Medicare supplement across Arizona and New Mexico. Grew from a solo scratch agency to a team of 11 with roughly \$18M in written premium.

EDUCATION

B.S. Finance, Arizona State University, 2005

Completed advanced commercial lines designation program, 2010

Completed risk management designation program, 2016

AZ and NM Property & Casualty and Life & Health Licenses, active

KEY SKILLS

- Agency P&L and operations
- Carrier appointments and contingent commissions
- Producer recruiting and comp plans
- Book acquisition and valuation
- Personal lines, small commercial, Medicare supplement
- Applied Epic, AMS360, HawkSoft
- Multi-location staff management
- Perpetuation and succession planning

PROFESSIONAL EXPERIENCE

Founder & Principal | Saguario Crossing Insurance Agency, Tempe, AZ, 2015 – Present

- Built the agency from a solo scratch office to \$18M in written premium across 4,200 households and 310 commercial accounts.
- Grew staff to 11 across two locations: 5 producers, 4 account managers, 1 service representative, and 1 office administrator.
- Hold contracts with 22 carriers including Progressive, Safeco, Nationwide, Hartford, and three regional carriers, giving producers real market access on tough risks.
- Kept agency retention at 89% or better every year since 2019 by moving service to a book-managed model with dedicated account managers.
- Sold a Medicare supplement book worth roughly \$1.4M in annualized premium to a specialist agency in 2022 to refocus on P&C growth.

Sales Manager | Copperline Insurance Services, Phoenix, AZ, 2011 – 2015

- Ran a team of 8 producers across personal and small commercial lines.
- Led the team to a 22% year-over-year new business increase in 2013 by rebuilding the lead scoring and assignment process.
- Hired and onboarded 6 producers during tenure, with 4 still active in the industry.
- Managed carrier relationships and quarterly business reviews with three regional carrier reps.
- Set weekly production targets and ran a Monday morning pipeline call that other offices later copied.

Senior Producer | Copperline Insurance Services, Phoenix, AZ, 2008 – 2011

- Wrote a mixed book of personal auto/home and small commercial, ending 2010 at \$1.1M in premium.
- Earned company Producer of the Year in 2010 based on new business and retention.
- Handled the office's largest habitational accounts including two apartment complexes.
- Completed advanced commercial lines designation in 2010.

Insurance Producer | Mesquite State Insurance, Chandler, AZ, 2005 – 2008

- E&O and agency compliance
- Bilingual English/Spanish

- Started as a captive personal lines producer, moved to independent side in year two.
- Wrote 300+ personal lines policies annually, mostly from purchased internet leads and referrals.
- Passed AZ P&C and Life & Health licenses in first 90 days.
- Learned agency management on AMS360 and Applied agency systems.