

## Nancy Carlson **MANAGING DIRECTOR**

**PERSONAL CREDO:** "Never settle for status quo; make a difference."

With more than 30 years of experience with major insurers, Nancy Carlson is a recognized and well-respected senior executive within the insurance industry. She combines a unique ability to exceed rapidly changing business requirements with a talent for developing innovative sales strategies. She's led teams, departments and agencies; she's propelled entire companies to new levels of growth.

As Senior Vice President of P&C Sales Marketing at Safeco Insurance Company, Nancy successfully integrated the marketing and sales functions of two merging Fortune 500 giants. In the process, she redesigned business plans and revenue models, while redefining sales goals that increased market share in alternative market spaces and accelerated existing units to improved efficiency.

In 2011, Nancy joined InStrategy Group as a Managing Director. A skilled communicator, she provides expertise in defining a company's vision, sales strategies and direction. She establishes these organizational objectives through a careful balance of collaboration, process re-engineering and strategic execution – with a focused eye on growth and sustainable profitability.

### **CAREER HIGHLIGHTS**

- As Sr. Vice President at Safeco Insurance Company, Nancy led the marketing organization through a comprehensive process improvement effort that resulted in increased quality and cost savings.
- Implemented expansion strategies and directed sales efforts as a Regional Sales Director of the Western Region for Travelers Insurance Company.
- As the Sales Manager for Nationwide Insurance and Financial Services, Nancy implemented start-up operations for Nationwide-exclusive agents in Washington state.
- Served as Senior Advisor and Consultant for Insurance Marketing & Management Services, directing the marketing and sales efforts of the web-based insurance information portal.

### **PROFESSIONAL ACCOMPLISHMENTS**

- Certified Master Sales Trainer
- Certified Sales Management Sales Trainer
- Certified Insurance Counselor
- Graduate of the Seattlecoach Executive Coach Program
- Graduate of the Wharton Executive Development Program
- Former High School teacher, California

### **EDUCATION**

B.A., Education  
Humboldt State University, Arcata, California

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