

## INSURANCE MARKETING & DISTRIBUTION

**InsureTech | Market Engagement | Corporate Strategy | Product Launch | Program Execution | Global 500 Firms**

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Dynamic, creative, and solutions-driven leader offering demonstrated sales and marketing management success spanning six distribution channels in the Insurance and Financial Services industry. A ground-breaking product and client engagement innovator recognized for building strategic marketing programs that grow sales, retail, and institutional brand awareness. Offering core expertise in developing and launching key industry-changing products and programs within the Insurtech, Cyber Insurance, Life, Annuities, Accident, Health, and Voluntary Employee Benefits markets.

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## PROFESSIONAL EXPERIENCE

**J. R. Warren, Jr., Consulting** – *Contract Insurtech and Insurance Consultant.*

**President**

2019–Present

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**Surance.io** – *Acting as Head of Distribution and Marketing and Go to Market Strategy for North America, Europe, Asia.*

**Consultant**

2022–Present

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Assist in the opening of Reinsurance, Insurance Carrier, and Distribution relationships for the sales and marketing of a First to Market Personal Cyber Protection application that provides consumers with a 360-degree sphere of protection for their household digital infrastructure by Protecting, Stopping the Attacks, and Repairing/Replacing lost data and damaged devices.

- Recruited and secured 2 North American Distributors
- Secured 1 North American Reinsurer, 1 Captive Insurer, and 2 Insurance Carrier Relationships (1 New Zealand)
- Refined the company's marketing pitch to carriers, distributors, and consumers
- Helped codify the dual marketing strategy between offering warranty and cyber insurance coverage

**COVU Insurance Solutions, LLC** – *Acting Chief of Staff to Head of Insurance.*

**Consultant**

2022–Present

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Support the Head of Insurance as a "utility field player" to get COVU in market and profitable. Covu provides an end-to-end solution, COVU takes ownership of front and back-office tasks, giving insurance agents time to focus on strengthening customer relationships, grow their business and embrace digital operations. Responsibilities include, but are not limited to:

- Recruit, sign and onboard: 1 Life Insurance Carrier and 1 Cyber Services Provider (with cyber carrier options)
- Identified and sourced over 700 Insurance Agencies as potential Covu clients - marketing is ongoing
- Provide editorial, copy, and marketing support of Insurance Customer Support and Compliance teams training
- Support Chief Revenue and Carrier Relations Officers in the refinement of their sales and marketing messaging, customer pitches, and in field support

**Invive** – *Acting Chief Operating Officer*

**Consultant**

2022–Present

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A months old Insurtech startup that helps underwriters personalize life insurance policies according to the unique health stats of customers. Combining AI with the emerging science of healthy aging, Invive offers a platform that both improves the precision of risk scoring and gamifies the process for customers.

- Provide guidance on go to market strategy
- Re-insurance and Insurance Carrier introductions
- Provide insight into Insurance Carrier operations, culture, and underwriting processes/procedures

**Gigeasy, Inc. – Marketing, Sales, Operations Consultant**  
**Consultant**

2022–Present

Insurtech start-up that provides benefits to address the unique challenges of the gig economy worker by providing these independent workers with access to a full suite of comprehensive benefits.

- Provide guidance on go to market strategy
- Re-insurance and Insurance Carrier introductions
- Provide insight into Insurance Carrier operations, culture, and underwriting processes/procedures

**MJ Sales Group – North America Distributor for Advanced Cyber Securities EndpointLock product.**  
**Strategic Advisor**

2019–Present

Recruit and manage Brokers and Distribution Partners in the US and Abroad for the sales and marketing of a patented keypad encryption technology, EndpointLock. EndpointLock protects data at the point of entry, the keyboard for phones, PC, Mac, and Tablets. Prevents keyloggers from stealing keystrokes.

- Recruited and onboarded 12 National Distribution Relationships
- Co-developed 7, 1M+ users, sales opportunities
- First year sales \$10M as of August 1

**Munich Reinsurance US Life Division**  
**External Consultant**

2019–2022

I leverage the knowledge developed during my 30+ year career in various market sectors within Insurance, Financial Services, and Insurtech with a focused expertise in strategy, innovation, product development, sales distribution, and channel management to include:

- C-Suite management team coaching & best practices
- Investor interaction and strategy
- Product ideation, proposition development & presentation
- Distribution evaluation, creation, and management
- Sales/Marketing/Distribution Technology scope, development, and launch

**REVOLUTION INSURANCE TECHNOLOGIES – PE-backed InsureTech firm serving the high-volume insurance market.**

**Chief Distribution Officer**

2017–2019

**Hired to Create Sales, Marketing, and Relationship Management team to Launch Platform.** Recruited and managed Insurance Carriers and Distribution partners. A Member of RIT Senior Leadership Team, designated Corporate Officer, and industry expert consultant to the RIT Board and Investors.

- Doubled Carrier recruitment goal by contracting and onboarding 8 Insurance Carriers representing 30 new products to the platform in 10 months.
- Rescued and resuscitated 40 FMO National Brokerage Distribution Partners representing \$100M+ in incremental revenue while recruiting another 10 new relationships to RIT in 6 months.
- Created sales and marketing tools including: platform demo, sales, and marketing .pdfs, and PowerPoint presentations for Carriers, Brokers, RIT Board (convinced Board to pursue additional product offerings and verticals) and Investors (helping to close out Round A funding and begin Round B.)
- Delivered game changing customizable multi-carrier/multi-product sales platform that revolutionized high volume call center sales increasing both the number customers spoken to per hour by 90% and the number products sold per customer by 35%.
- Hired VP FMO Sales and Internal Wholesaler to assist with Broker recruitment, onboarding, and management.

**PAYLOGIX – An industry-leading health & welfare TPA and InsureTech firm.**

**Practice Leader – Exchange Builder®**

2016–2017

**Recruited to Build and Capture new business relationships to the new Exchange Builder® platform.**

Including Carriers, Product Providers, and Producer Groups for the voluntary and core benefits insurance segment.

- Provided entry into small employer group market by demonstrating first-to-market industry benefit technology advantage to carriers and distributors.
- Exceeded carrier and broker recruitment goal by contracting 12 carrier partners and 7 national distribution partners in 18 months.

- Created sales and marketing tools that enabled easy and cost-effective DIY case set-up for both carriers and brokers.
- Developed and authored Avatar sales script that enabled consumers to effortlessly navigate the enrollment platform, learn about products, and understand the need to purchase multiple products as a “value meal” or in combination.
- Represented company and presented at 2 DIG Insurtech conferences. The presentation was interactive and allowed audience members to use the platform as employee/consumers would.

**PRUDENTIAL FINANCIAL** – *Global 500 insurance and financial services firm.*

**Managing Director**

2012–2015

**ALPHA INSIGHTS LLC.** – *Information services firm providing specialist advisory services across multiple industries.*

**Consultant - Insurance Industry**

2011–2012

**Offered insurance and financial services consulting advice.** Spanning regulatory environment-pending legislation, distribution channels, product and technology development, and compensation plans.

**SYMETRA FINANCIAL** – *Offering retirement plans, benefits, annuities, and life insurance via multiple channels.*

**Vice President Agency Distribution**

2007–2010

**Promoted to rescue a failing independent Distribution Channel impacted by a poor restructuring program.**

- Increased Life Insurance sales from \$7M–\$33M and Annuities from \$300M–\$800M in two years, undertaking “from scratch” development of new IMO Distribution Channel.
- Hired, managed, and developed team of RVPs. Exceeded sales revenue quotas 105%, 178%, and 120% each year respectively, by nurturing a collaborative team culture.
- Reignited life and annuity sales by developing and launching 3 new life and 4 annuity products.

**Vice President Marketing**

2005–2007

**Hired to Centralize the Marketing Function within the Company.** Led marketing and sales support team of 40 reinforcing five distribution channels: Individual, Bank, Wire house, Broker-Dealer, and Group/Voluntary Benefits.

- Developed annual and five-year comprehensive marketing strategy, increasing sales 20% year-over-year. Created 17 new Product Message Maps customized for each channel and reduced delivery and project management times 40%.
- Managed three first-to-market products and launched five Life and Annuity products while improving speed to market from 14 to 9 months.
- Grew and developed team members, promoting 7 into supervisory roles within the company.

**KANAWHA INSURANCE COMPANY** - *Formerly a provider of stop loss, voluntary employee benefits, and LTC.*

**Vice President of Marketing**

2002–2004

**Recruited to Take Company Nationally from 4-State Regional Footprint.** Led Marketing, Sales, and Operational Support, re-branded the company nationally, streamlined distribution channel management/support and fine-tuned strategies that matched distributor needs to products and sales support.

- Grew revenue from \$3M to \$18M in 18 months through the formation of new IMO/BGA distribution channel.
- Improved the proprietary POS digital enrollment system, added company products to three industry leading e-enrollment platforms/TPAs, and led a large-scale redesign of branding and marketing collateral.
- Advanced efficiency and speed to market three-fold by introducing and chairing a cross-functional product implementation team responsible for five new products over a two-year period.

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## EDUCATION AND INDUSTRY CERTIFICATIONS

**MBA**, University of Mississippi, Oxford, MS

**Bachelor of Science (Economics)**, Clemson University, Clemson, SC

**Designations:** CLU®, ChFC®, and RIA

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