

Naomi Morales

P&C Sales Executive

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STRENGTHS

- 👤 **Executive selling**
CIO and CTO conversations became clearer after linking technology priorities, financial outcomes, and delivery realities.
- 🎯 **Pursuit leadership**
Cross functional teams gained focus through structured capture plans, clear decisions, and steady movement toward close.
- ♥️ **P&C expertise**
Carrier discussions became more productive by connecting policy, billing, claims, regulatory, and operating priorities.
- 📌 **Commercial judgment**
Pricing and risk reviews stayed grounded in service economics, delivery assumptions, and customer business value.
- 🕒 **New logo growth**
Consistent market research and stakeholder mapping turned unfamiliar accounts into qualified conversations and strategic pursuits.

SKILLS

P&C insurance IT services sales

New logo sales Managed services

IT outsourcing

Application outsourcing

Application development

Infrastructure services Data and AI

Digital solutions

Systems integration

Professional services

Account strategy

Market assessment

Value propositions

SUMMARY

P&C insurance technology sales executive with 14 years across IT services, consulting, **managed services**, **systems integration**, and **new business development**. Builds net new logo pipelines and expands strategic accounts across national and global insurers. Consistently exceeds annual quotas above **\$6 million** through disciplined qualification, account planning, competitive analysis, executive presentations, negotiation, and commercial close. Shapes application outsourcing, application development, infrastructure, data, AI, digital solutions, ERP, regulatory compliance, and managed services opportunities with delivery teams. Influences CEO, CIO, CTO, and senior technology stakeholders by connecting modernization priorities, financial objectives, operating risks, and customer outcomes. Combines P&C domain knowledge with financial acumen, strategic agility, and practical pursuit leadership. Ready to contribute consultative sales leadership that converts complex insurance priorities into measurable services growth.

EXPERIENCE

Senior P&C Sales Executive

Aster Peak Technology Partners 📅 March 2022 - Present 📍 Chicago, IL

Owns new logo and strategic account sales for P&C insurers, leading complex services pursuits across application outsourcing, cloud infrastructure, data, AI, digital transformation, and managed operations. Partners with architects, delivery leaders, and commercial teams from qualification through contract close.

- Exceeded **annual quotas** above **\$6 million** through disciplined pursuit governance and executive negotiations.
- Led carrier **application management** capture across policy, billing, claims, and **integration services**.
- Built CIO and CTO relationships by connecting modernization priorities with phased value propositions.
- Expanded AI and data discussions into broader transformation opportunities with measurable service outcomes.
- Established **account planning** practices covering **market assessment**, stakeholder mapping, scoring, and executive sponsorship.

Insurance Services Sales Director

Harborstone Consulting Group 📅 July 2018 - February 2022 📍 Milwaukee, WI

Directed insurance services sales across systems integration, **professional services**, **application development**, infrastructure modernization, managed services, and IT outsourcing. Owned strategic pursuits, executive relationships, account strategy, pricing, negotiation, and revenue performance for regional and national carriers.

- Closed multiyear application support engagements through discovery, workshops, pricing, **negotiation**, and approval.
- Built managed services business cases using cost analysis, **service levels**, risk, and transformation sequencing.
- Positioned SAP, **Oracle**, and **Salesforce** within insurer finance, customer, distribution, and service programs.
- Created competitive account strategies using investment priorities, incumbent analysis, procurement timing, and decision criteria.
- Mentored pursuit teams on executive messaging while retaining ownership of forecasts, pipeline, and negotiations.

Business Development Manager, Insurance

Blue Prairie Systems 📅 June 2015 - June 2018 📍 Des Moines, IA

Developed new business with P&C insurers for application services, systems integration, **digital solutions**, and consulting engagements. Progressed opportunities from market research and prospecting through discovery, solution shaping, executive presentation, negotiation, and **commercial close**.

LANGUAGES

English	Native
Spanish	Proficient

MY CAREER



- Senior P&C Sales Executive at Aster Peak Technology Partners (4.6 Years)
- Insurance Services Sales Director at Harborstone Consulting Group (3.6 Years)
- Business Development Manager, Insurance at Blue Prairie Systems (3 Years)
- Account Executive, IT Services at Summit Arc Managed Services (2.8 Years)

- Built qualified pipelines by researching carrier strategies, technology estates, regulatory pressures, and renewal cycles.
- Supported mobile and **claims** modernization wins by translating discovery findings into focused value propositions.
- Scoped integration dependencies, staffing assumptions, implementation risks, and transition considerations with delivery specialists.
- Presented financial and operational cases linking **pricing** logic, delivery assumptions, and insurer objectives.
- Advanced into larger pursuits through reliable **forecasting**, negotiation preparation, and insurance services knowledge.

Account Executive, IT Services

Summit Arc Managed Services 📅 August 2012 - May 2015 📍 Madison, WI

Sold managed infrastructure, application support, and **consulting** services to commercial accounts while building foundational expertise in recurring services economics and complex technology sales. Managed prospecting, qualification, proposals, presentations, commercial reviews, and early insurance sector growth.

- Sold managed infrastructure and application support services by aligning scope with operating requirements.
- Built new account pipelines through research, stakeholder discovery, qualification, and documented next steps.
- Developed proposals connecting support models, transition activities, service scope, and commercial terms.
- Presented solutions to IT managers and directors, addressing technical, financial, and delivery concerns.
- Negotiated services agreements within approved parameters and coordinated pricing, **risk**, and delivery reviews.

PROJECTS

P&C Carrier Application Management Capture 📅 2024

Led a cross functional pursuit for policy, billing, claims, and integration services, aligning delivery feasibility, executive value, and commercial terms through close.

Insurance Digital and Data Growth Program 📅 2023

Connected AI use cases, regulatory priorities, and operational pain points with broader transformation propositions for strategic insurance accounts.

Strategic Account Planning Framework 📅 2022

Created repeatable methods for market assessment, stakeholder mapping, opportunity scoring, competitive analysis, and executive sponsorship across P&C pursuits.

LEADERSHIP & AWARDS

- President's Club, Aster Peak Technology Partners, 2024
- Top New Logo Pursuit Award, Harborstone Consulting Group, 2021
- Senior Mentor, Insurance Technology Sales Mentoring Circle, 2023 to Present

EDUCATION

Bachelor's Degree in Business Administration

University of Wisconsin Madison 🎓 GPA: 4.0 📅 2012 📍 Madison, WI

Coursework: Financial Management, Marketing Strategy, Operations Management, Business Analytics

CERTIFICATIONS

- Salesforce Certified Associate 📅 2024
- AWS Certified Cloud Practitioner 📅 2023

TECHNICAL SKILLS

- **Insurance Platforms:** SAP, Oracle, Salesforce
- **Application Services:** Application outsourcing, Application development, Application management
- **Infrastructure Services:** Cloud infrastructure, Managed infrastructure, IT operations
- **Data and AI:** Data services, Artificial intelligence, Analytics
- **Digital Solutions:** Digital transformation, Mobile solutions, Customer experience
- **Integration Services:** Systems integration, APIs, Integration architecture
- **Consulting Services:** Professional services, IT consulting, Management consulting
- **Sales Methodologies:** Opportunity qualification, Account planning, Pursuit governance
- **Commercial Sales:** Value propositions, Pricing strategy, Contract negotiation
- **Insurance Operations:** Policy administration, Billing systems, Claims systems
- **Executive Engagement:** CEO selling, CIO selling, CTO selling
- **Compliance Solutions:** Regulatory compliance, Risk assessment, Governance

PROFESSIONAL AFFILIATIONS

- Insurance Technology Sales Mentoring Circle, Senior Mentor, 2023 to Present
- P&C Digital Transformation Forum, Volunteer Roundtable Facilitator, 2022 to Present

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST