

Colby Allen

Consultant Financial Analyst

M.B.A., ARM, AIDA, CXAP, XMF

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EXPERIENCE

AgencyFocus, Nationwide — Financial Consultant

April 2023 - PRESENT

Consultant Financial Analyst working with Independent Insurance Agencies through Fractional CFO engagements set strategic plans for growth or exit planning.

LWCC, Baton Rouge, LA — CX Analyst

Jan 2021 - March 2023

Two year project to build a new agent quoting portal and internal strategic consultant for agent marketing and communications.

McGriff, Nationwide — Analytics Project Manager

Jan 2013 - Dec 2020

Project manager to create and roll out analytics resources for P&C within a national agency. Book of business analysis and transfers for acquired agencies. Financial reporting and reconciliation for acquired agencies. Marketing and Operations Analyst for standard operating procedures.

EDUCATION

University of Louisiana Lafayette, Lafayette, LA

M.B.A. Finance - Graduated 2021

University of Louisiana Lafayette, Lafayette, LA

B.S. Insurance & Risk Management, Finance Minor - Graduated 2013

SKILLS

Strategic Planning, Entrepreneurs Operating System, Financial Planning & Analysis, Risk Management

Certifications/Designations

Producer License P&C, Louisiana.
Earned and maintained since 2013.

Associate in Risk Management (ARM). Earned June 2019.

Associate in Insurance Data Analytics (AIDA). Earned November 2018.

Customer Experience and Analytics Professional (CXAP). Earned January 2022..

Notable Projects

- Sr. Analyst for 4 successful acquisitions to facilitate book rolls and commission reconciliations. Between \$3M and \$90M of agency revenue.
- Successful rollout of sales enablement analytics for 1,000+ users in a national agency.
- Design and successful rollout of regional carrier agent quoting portal for workers' compensation.
- Design and successful rollout of monthly FP&A production report for a regional agency.