

Curriculum Vitae

LISA HISER HARRINGTON, CPCU, CAE, CRIS, CAM, AAM, AAI, AIAM, AIP
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SUMMARY OF QUALIFICATIONS

Mrs. Harrington is a natural leader and orator. She is the CEO of Sapphire Enterprises LLC; she is a Vistage Chair and trusted advisor. Her book, *Taking in Strays: Leadership Lessons from Unusual Places*, highlights her unique approach to leadership. Her past experiences as COO, CMO and EVP, plus thousands of hours of training she has provided to others, have given her unique insight into the secrets of success in many industries. Her goal is to help more people grow and succeed, because she believes that by creating better leaders we create a better world. She holds a B.A. degree in Management and Spanish from Ball State University and has earned several certifications: CPCU, CAE, CRIS, CAM, AIAM, AAI, & AIP.

The experience assisting the lobbyists in the Florida association gave her an appreciation of the legal and legislative processes. She has served on the boards of directors for several organizations and is experienced in helping non-profit organizations succeed. Her work in consulting and many years of executive experience give her a unique perspective on the agency system. She also has been involved for decades in the development of management and workflow standards for small businesses. She has a long-standing history and reputation within the American Agency System. Her experience in the field prepared her for the work as an educator for the Florida Association of Insurance Agents (FAIA), as EVP and CMO for IRMI, and many others. She taught at the Independent Insurance Agents and Brokers of America's National Conference, and for the Insurance Brokers Association of Canada, among others.

EDUCATION

BA Management and Spanish: 1983

Ball State University, Muncie, Indiana

Three-year graduate (GPA 3.3 / 4.0)

INDUSTRY CREDENTIALS

- *Construction Risk Insurance Specialist: 2015*
International Risk Management Institute (IRMI)
Highly specialized industry education for construction insurance
- *Certified Account Manager: 2011*
Independent Insurance Agents of Texas
Created one part of five and taught courses for better customer service and professionalism
- *Associate in Insurance Account Management: 2008*
Independent Insurance Agents and Brokers of America (IIABA)
Created, developed, and taught for FAIA and IIABA by Mrs. Harrington

- *Certified Association Executive: 2004*
American Society of Association Executives (ASAE)
Highest level of industry education for trade association professionals
- *Associate in Insurance Production: 2000*
Independent Insurance Agents and Brokers of America (IIABA)
Created, developed, and taught for FAIA and IIABA by Mrs. Harrington
- *Accredited Advisor in Insurance: 1998*
Insurance Institute of America
Created for agents and agencies in the property and casualty business
- *Chartered Property & Casualty Underwriter: 1993*
Professional Association for Chartered Property Casualty Underwriters and the IIA
Highest level of insurance industry education using 27 textbooks and 30 hours of bluebook exams
- *Associate in Automation Management: 1989*
The Insurance Institute of America (IIA)
Later renamed by IIA as Associate in Insurance Technology (AIT)

PROFESSIONAL EXPERIENCE

Sapphire Enterprises LLC – Southlake, TX

Owner, Chief Executive Officer: 2009 to present

Mrs. Harrington is the founder and chief executive officer for Sapphire Enterprises LLC. She is a Vistage Chair and professional keynote speaker for topics on Leadership, Management, Sales, Vision Mapping and Strategy. Her speaking style is precise, fun and energetic, making strong connections with the audience. Each presentation is tailored to the audience. Her consulting specialties include trade association issues, strategic management, operational procedures, troubleshooting and crisis management, insurance producer development, contract assistance for employee agreements, customer service training, workflow evaluation, errors and omissions avoidance, culture shift, leadership coaching and training, and sales and sales management. As a prior faculty member of the Independent Insurance Agents and Brokers of America Virtual University, (IIABA VU) she provided consulting assistance for Big I members and was a contributing author. She was often retained by the Independent Insurance Agents of Texas, instructing for the Certified Account Manager Program, the Small Agency Conference, and more. Her work at the Network of Vertafore Users (NetVU) began as a consultant, which led to work as the COO and subsequently as Acting CEO/Interim Executive Director, with accommodation for continuing the private practice. Her consulting practice was dormant while employed at IRMI.

Author – Southlake, TX

Taking in Strays: Leadership Lessons from Unusual Places: March 2013; updated 2017

This volume is a serious business book with a fun twist. The leadership lessons of communication, persistency, loyalty and more are taught using the stories about Mrs. Harrington's many animals she has owned over the years. In this way the reader can see the classic leadership attributes and hear about new ideas and ways to employ

leadership while enjoying the interesting stories about dogs, cats, horses, and birds.
www.takinginstrays.com

International Risk Management Institute (IRMI) – Dallas, TX

Executive Vice President & Chief Marketing Officer: 2013-2018

Mrs. Harrington was an executive officer at IRMI, a privately held company, responsible for driving revenue and handling all areas related to client engagement. She managed four departments: Customer Success, Conference Management, Sales and Marketing. Twenty-five employees reported to her through four directors. Her conference management responsibilities included six annual insurance and risk management conferences in three industry verticals: construction, energy, and agriculture, attracting over 3,000 industry professionals a year to the events. In addition to conference sales, the sales and marketing crew promoted and sold 40 online subscription-based content products which are recognized as the industry's most complete and accurate resources for expertise and education. Customer Success staff handled thousands of inquiries a year about the products, certifications, and education provided by IRMI. IRMI's family of companies includes WebCE, the largest provider of continuing education for insurance agents and other industries. Also owned by IRMI is ZeroRisk HR, a testing, hiring and consulting firm. Mrs. Harrington's work on the Executive Committee involved all aspects of strategic management and operational strategies for the three enterprises, coordinating and prioritizing opportunities with the Chief Information Officer, Chief Financial Officer, Chief Content Officer and the President & CEO. The Executive Committee also hears reports from all departments routinely and reports to the ownership, Chair and Vice Chair of the Board quarterly. During Mrs. Harrington's tenure she was charged with significant change management including modernization of marketing aspects of the website, input on product development, updating external messaging to the industry, departmental restructuring, strategic planning, and more.

NetVU – The Network of Vertafore Users – Irving, TX

Acting CEO: November 2011 to 2013

Vice President and COO: March 2011 to Nov 2011

Mrs. Harrington was a Retained Consultant in the capacity of acting COO from January 2010 until March 2011 when the position was made permanent and the Board of Directors named her as corporate VP and COO. Her duties were typical of a chief operating officer: managing staff, assisting in the development of the corporate strategic plan, public relations, marketing assistance, and more. Her work with the education department included the overall re-design of the education department including the creation and implementation of certification programs for members. She was responsible for the following departments: accounting, education, conference, marketing, administration, sales, industry relations, research and development, and others. In November of 2011 she was asked to act in the capacity of Interim Executive Director & Acting CEO.

Florida Association of Insurance Agents – Tallahassee, FL

Vice President of Education: 2001–2009

Director of Education: 1999–2001

Mrs. Harrington managed the Education Department for the premier statewide independent insurance agents' association in Florida for nearly eleven years. Her duties included direct operations of the department, including staffing; budgets; scheduling; teaching, facilitating and

auditing courses; writing classes; coordinating outside contractors; developing new methodologies and delivery; and marketing of online, on site, and traveling schools. Mrs. Harrington managed a staff of twelve and a million-dollar budget for over a decade. Her corporate responsibilities included new staff orientation, executive responsibilities to the mission and vision of the corporation, and leadership during both high and low cycles of the industry. While a registered lobbyist for just one year, she was active in the lobbying activities of the association for her entire tenure, often attending legislative committee meetings and hearings during the legislative session. Mrs. Harrington acted as an advisor to the Florida Department of Financial Services, speaking on behalf of independent agents. She created the Associate in Insurance Production (Elite Force Sales Training Program) and the Associate in Insurance Account Management professional designation programs with IIABA; these are unique training courses for agency staff, including monitoring and accountability, which have been approved by the IIABA's Best Practices Council. Mrs. Harrington directed the creation and implementation of the Young Agents Council, online and webinar style classes for members, the board development program titled Florida's Future Insurance Leaders and other programs, which are now institutionalized. She was the staff liaison assisting with the creation of the FAIA Good Works Fund, which provides scholarships to students entering an insurance major in an accredited college.

Lupfer-Frakes Insurance – Kissimmee, FL

Operations Manager: 1995–1999

Mrs. Harrington managed up to four office locations, including all support staff (35+). Departments under her direction included Facilities, Administration, Personal Lines and Small Account Sales, Human Resources/Education, Operations Budgets, and Quality Control. During her tenure, the agency was able to grow net pre-tax revenue with a decrease in staff through attrition. Among other accomplishments, she refined the workflow to include expanded use of the agency management system and transactional filing in the personal lines department. Also, she combined two offices into a single location on the east coast, creating a higher profit margin for that book of business.

Commercial Sales Agent: 1993–1995

Mrs. Harrington handled direct insurance sales to business owners in the community. All aspects of the sales process were her responsibility, including telemarketing, prospecting, review of prepared proposals, some negotiations with underwriting and agency marketing staff, presentation of proposals to individuals and groups, and collection of premiums. Maintenance of the accounts, including updates, endorsements, and renewal follow up, was also her responsibility.

The Seibels Bruce Group, Inc–Orlando, FL

Territorial Sales Manager: 1991-1993

Public relations and training for over 50 agency offices with an independent agency company. Mrs. Harrington managed a nine-county territory in Central Florida. Duties included recruiting new agencies, evaluating their business strategies, qualifying them for approval of company contracts, training staff in carrier products, assisting agency managers with building and developing their practice, and maintaining relationships. Also handled discipline of agencies not reaching goals or for other reasons, and terminating non-productive locations.

Senior P&C Underwriter: 1989 -1991

Personal Lines Underwriter, training coordinator, workflow specialist. Mrs. Harrington designed and developed a workflow for the department, which reduced turnaround time for new policies from 72 days to 14. She also trained new assistants in policy coverages.

American Mutual Fire Insurance Company - Charleston, SC**P & C Underwriter, Flood Underwriter: 1987–1989**

As a Personal Lines Underwriter for approximately one-half of the state of Florida, Mrs. Harrington developed an agency accountability system, which assisted in the tracking of production and profitability for the agencies; this system was later adopted by the entire department.

Companion Life Insurance – Columbia, SC**Field Representative: 1986–1987**

This position was as a dedicated inside field representative to the company's largest broker. Mrs. Harrington assisted the agency staff in selling accounts and serving corporate customers who purchased 401k programs for their employees.

Allstate Insurance – Indianapolis, IN**Personal Lines Underwriter: 1983–1986**

Mrs. Harrington handled over fifty agency locations, assisting with qualifying new accounts. She was the department trainer for the new paperless underwriting system and created a training and reference log for the department.

PUBLICATIONS

Mrs. Harrington has written hundreds of articles on the topics of insurance agent education, leadership, sales and sales management, customer service, agency management, contract issues for producers, and much more. The following is a partial list of locations where you'll find articles with her byline. She was a regular contributor in the "For the Manager" column at American Agent and Broker Magazine from 2010 through 2014.

- *Agents Education* newsletter from the Florida Association of Insurance Agents
- *Agents Confidential* Newsletter from the Florida Association of Insurance Agents
- *Independent Agent Magazine* from the Independent Insurance Agents and Brokers of America
- *Florida Underwriter Magazine* from Summit Business Media
- *American Agent and Broker Magazine* from Summit Business Media
- *National Underwriter Magazine*
- *Rough Notes Magazine*
- *IIABA Virtual University*
- *Greater Orlando Apartment Association Newsletter*
- *Expert Commentary* at IRMI.com



BOOK AUTHORED:

Taking in Strays: Leadership Lessons from Unusual Places

ISBN-13: 978-0615784229 Released March 2013
Relaunch 2017 with additional chapters

AFFILIATIONS / LICENSES

Abiding Grace Lutheran Church: President 2017-2018, Treasurer 2012-2014
Construction Risk Insurance Specialist: 2016
Clear Direction Management Certificate: 2014
Dallas Ft. Worth Association Executives: Board of Directors, 2012-present; A-Day 2012 and 2013 Chair
IIABA Best Practices: Council Member, 2012 to present
Plaid for Women: Advisory Board -- Operational Strategy, 2013
American Association of Insurance Management Consultants: Member, 2010-2011
CPCU Society, Member: 1993 to present
Your Executive Symphony Professional Networking Group, Board: 2010-2011
Voces Angelorum, an auditioned Chamber Choir, Board Member: 2009
Big Bend Walk to Emmaus, Board Member: 2006–2009
Grace Lutheran Church, Board Member: Vice President: 2001–2003; President: 2003–2005
Central Florida CPCU Society: Treasurer, 1997–98; Vice President -1998–99
Redeemer Lutheran Church, Board Member: Vice President: 1992–1993; President: 1993-1994
Apartment Association of Greater Orlando, Secretary for Associate Membership: 1994
Delta Sigma Pi Professional Business Fraternity: 1981–1983

Florida General Lines 2-20 Agent: 1993–2010
Florida Life and Health 2-18 Agent: 1993–2010

PARTIAL LIST OF CLASSES CREATED and/or TAUGHT by Mrs. Harrington

Sales and Sales Management

From Query to Close
 The Complete Circle
 How Objections Help You Close the Deal
 Prospecting in the New Century
 The Closing Tool Kit

From the AIP series:

Perception, Power and Performance
 Consultative Relationships
 The Numbers Game
 Prospecting
 Time Management
 The Perfect Sale
 Learning as a Lifestyle
 Six Steps to Success
 Marketing for Success
 Managing the Sales Process
 Referrals
 The Presentation
 Business Etiquette
 To Close or Not to Close
 The Negotiations
 Conflict and Politics
 War Stories
 Team Work and the Case Analysis
 The Customer as King
 The Triangle
 Motivation for the Long Run
 The Interview
 Your Sales Style

Leadership and Management

Practical Leadership
 Finding the Perfect Employee
 Orientation, Training and Retention: On the Run!
 Communication and Trust

Customer Service

From the AIAM series:

Understanding Consumer Needs
 Best Practices of Customer Service
 Mastering Time
 Organizational Workflow
 Negotiating Conflict
 Professional Relationships in the Insurance Agency
 How Not to Get in Trouble with Your Mouth
 The Write Stuff
 Regulation, Politics, and Polish
 Leadership is Everyone's Job
 Why Be Ethical
 Changing Attitudes, Creating Opportunities

Best Practices (certified in all courses for IIABA Best Practices)

Joint Agency Company Planning
 Perpetuation
 Top Producers
 Customer Service
 Five Practices of Highly Effective Leaders

Miscellaneous

Elements of Good Negotiations (for TSAE)
 Leadership courses for FFIL, FAIA's Board Development
 Dozens of other smaller speaking engagements in various topics

REFERENCES

Veronica M. Della Porta, CIC, CRIS, CPIW

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