To The Industry That Chose Me

Lifelong professions often begin with a carefully mapped out plan. Mine began with a conversation across a bar.

Early in my career, I was working in marketing while bartending part-time. One of my customers owned a small insurance brokerage and asked if I would help refresh their marketing materials. What began as a single project soon evolved into additional responsibilities, then deeper involvement in the daily operations. Before long, I found myself learning the intricacies of an industry I had never seriously considered, yet one that increasingly captured my interest. Two years later, I accepted an entry-level CSR position at M3 Insurance. What I thought would just be the next step in my career turned out to be the beginning of a professional journey that has spanned almost fifteen years—and one that continues to challenge and inspire me every day.

To most people outside the industry, insurance is often reduced to a handful of words: policies, premiums, and paperwork. While those things are certainly part of what we do, what keeps me passionate about this industry is something much more significant: people. The relationships I have built with clients and colleagues are what make the work truly meaningful and I have come to realize that the most important part of my job has less to do with insurance itself. Rather, it is about being there when clients need a trusted partner, helping them navigate challenges, solving problems they did not expect, and celebrating their successes along the way.

One of the things I value most about my company is its commitment to building long-term relationships, and that has shaped the way I approach my role. I am more than a service provider to many of my clients – I have become a trusted advisor. In many cases, I feel like an extension of their internal team. I know their businesses, understand their goals, recognize the challenges they face, and appreciate the nuances that make them unique. There is something incredibly rewarding about receiving a call from a client who knows you will pick up the phone, listen, and help find a path forward. That trust is not earned overnight—it is built through consistency and a genuine investment in their success.

As I reflect on my professional journey, there are three key milestones that helped shape both the professional I am today and the advisor I aspire to be.

The first occurred when I joined M3 as an entry-level CSR and was fortunate to land on the same team I am a part of today. The energy was infectious and the team was genuinely excited about the work and equally excited to be a mentor. From the very beginning, I was surrounded by people who challenged me to grow while also giving me the support and confidence to succeed. My team leader created an environment where ideas were welcomed, trust was given, and expectations were high. Within 6 months I was promoted to the next level of client services.

The second defining chapter came just before the COVID-19 pandemic. Our team was onboarding several large complex accounts, and almost overnight the world changed. I found myself spending long days at a makeshift office (my dining room table), helping clients navigate uncertainty while simultaneously managing these onboarding projects. There was no roadmap, no easy answers and no option to step back. One of those clients was a large hospitality business with over 3000 employees. They were unable to operate during the shutdown and subsequently had to halt construction of a new 52 acre waterpark leaving them reeling for ways to find coverage for lost business income. I did a deep dive of every policy they had. One of those late nights at the dining table, I found some obscure policy language that ended up paying out $1M in coverage. Those months taught me some of the most valuable lessons of my career: resilience, flexibility, and the importance of showing up when your clients need you most. It was a period that tested me professionally but also revealed some of my greatest strengths.

The third milestone has been my transition into the role of Senior Client Manager II, which recognizes my ability to consult with clients at the highest level of service at M3. Managing a large and complex book of business is both a responsibility and a privilege. Every day serves as a reminder of the trust that my clients and colleagues have placed in me throughout my career. Around that same time, I was selected to serve on the M3 Foundation Board of Directors. Through charitable giving and community service, I have been able to connect my professional life to a broader purpose. Serving on the Foundation Board has reinforced something I have always believed: success means more when it creates a positive impact for others.

Across each of these experiences, the skills I am most proud of cultivating have been relationship building, problem-solving, and adaptability. Each developed through years of listening, learning, and earning trust one conversation at a time. More importantly, they have shaped how I show up each day—with accountability and a commitment to helping others succeed.

As I look toward the future, I am energized by the evolution of our industry. The tools, technology, and resources available today are transforming the ways we can support our clients. We have more opportunities to move beyond traditional insurance transactions and become true strategic advisors. Every day I am using new technology to review, prepare or present to my clients. I'm excited by these advancements because they allow us to elevate our role by focusing on what matters most: the people.

Almost fifteen years after beginning my insurance career, I am grateful for the path that brought me here and excited for what lies ahead. I look forward to continuing to build trusted relationships, helping clients succeed, and contributing to the growth and evolution of an industry that chose me.

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