

James McCormick

Sales & Operations Leader

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Winona, MN

PROFESSIONAL SUMMARY

Sales leader who has carried a quota, helped build a sales agency from 8 to 20, and coached new agents to a weekly number. Most recently Business Manager behind a multi-division service business's 5x revenue growth (\$1M to \$5M), owning the pricing, pipeline, and marketing an owner-led sales effort ran on.

SALES RECORD

- **American Income Life:** #6 of 112 nationally on personal + team production (December 2017); led a team of 10 through two supervisors; trained about 45 agents in two years against a \$4,000-a-week release bar.
- **The Horton Group:** ~\$90K in new revenue against a \$60K first-year quota; never lost a client.
- **ArborScape:** set the pricing rules, estimate templates, and pipeline stages behind 5x growth; ran the marketing that took Garden Maintenance from ~\$95K (2024) to ~\$250K (2026).

EXPERIENCE

Business Manager → Fractional CFO | ArborScape Inc. — Woodstock, VT

Aug 2022 – Present

Scaled revenue 5x and grew team from 8 to 30 in 4 years

Employee #9 and primary operational architect, partnering directly with ownership to scale a family-owned landscaping operation into a regional market leader.

Full-time Business Manager Aug 2022 – Aug 2026. Since Aug 2026: remote fractional CFO on contract — monthly financials, budgeting, KPI reviews, and vendor contracts.

- **Scope:** Full P&L ownership across 8 service divisions — go-to-market, pricing, workforce planning, vendor contracts, monthly financials, and biannual strategic reviews with 6- and 12-month revenue forecasts. Daily operating partner to ownership, with formal business reviews twice weekly.
- **Internal Overhaul:** Rebuilt the back-office stack required to support the transformation — HR (TeamEngine), accounting (QuickBooks Online + chart of accounts rewrite), payroll (Workforce), operations (DynaScape Manage360, Microsoft 365, iPad field data capture), and marketing (website overhaul, print-ad redistribution). Shipped three custom React/TypeScript/Supabase apps (workforce planning + field knowledge library + voice-driven CRM with sales pipeline tracking) and introduced 10+ AI workflows across 6 functions, recovering ~25–30 hours/week. Sales remained owner-led.
- **Financial Infrastructure:** Rebuilt accounting foundations — migrated QuickBooks Desktop to Online, rewrote chart of accounts for multi-division P&L visibility, developed yearly budgets, and established quarterly KPI reviews.
- **Division Launches:** Organized and managed the launch of recurring service lines: Garden Maintenance division (built from an acquihire — 3x clients, 4x revenue over 3 years), Plant Health Care (~2x annual revenue), and in-house Masonry division (built from scratch to six-figure annual contribution over 3 years).
- **People Strategy:** Formalized the leadership layer needed to scale from 8 to 30 — designed the org structure, implemented the first handbook, built compensation bands and performance-based bonuses, and led strategic planning. Recruited targeted hires to own new functions as they matured, including an office manager (administrative function) and a part-time social media manager (marketing output).

Business Development Consultant | United Church Camps — Remote

Feb 2021 – Jun 2022

Led second-largest capital raise in org history — \$850K

- **Capital Campaign:** Directed fundraising initiative securing nearly \$850,000 — the second-highest capital raise in the organization's history.
- **Data-Driven Outreach:** Managed the donor pipeline in Salesforce — segmented donor data and ran A/B tests on targeted outreach, optimizing conversion during post-pandemic recovery.
- **Marketing & Strategy:** Developed the annual marketing strategy alongside leadership, then stepped into the acting Marketing Director role mid-engagement when the position was vacated — maintaining campaign continuity through the transition.

Risk Advisor & Sales Executive | The Horton Group — Waukesha, WI

Sep 2019 – Oct 2020

Closed ~\$90K and held 100% account retention in the pandemic year — selling B2B risk programs to CFOs at a top-50 broker

- **Role Context:** Deliberate step up from transactional sales into formal B2B enterprise account development at a top-50 U.S. insurance broker (pre-Marsh McLennan acquisition) — selling risk management programs to CFOs and owners at mid-market and enterprise companies.
- **Development & Exposure:** Partnered with senior producers on large accounts, gaining rare visibility into the financials, org structures, and risk management playbooks of 30+ companies across industries.
- **Individual Production:** Closed ~\$90K in new revenue during the first year of the pandemic and maintained 100% retention on assigned accounts.

Regional Sales Manager | American Income Life — Minneapolis, MN & Milwaukee, WI

Oct 2016 – Oct 2019

*One of four agents who built a new agency from 8 to 20, \$1M+ first-year sales – 100% commission-based**American Income Life's official title for the role was Master General Agent, supervising a region.*

- **Office Launch:** Relocated to Milwaukee to help stand up the Milwaukee office — one of four regional agents who built the new agency from 8 to 20 agents in the first year, achieving \$1M+ in net new sales.
- **National Ranking:** Ranked #6 out of 112 nationally (December 2017) through a combination of personal sales and leading a high-performing regional sales unit.
- **Talent Cycle:** Owned recruiting and development end to end on a weekly cadence — wrote the job ads, ran first-round and sit-down interviews, made the hiring decisions, and trained each new agent until they were released to sell on their own.

Market Sales Manager | Brookdale Senior Living — Minneapolis, MN

Oct 2013 – Oct 2015

Proposed a centralized sales model that went national in six months

- **Progression:** Promoted from Sales Coordinator to Sales Manager to Market Sales Manager.
- **Community Sales:** Sole salesperson for an assisted-living community, filling capacity alongside the executive director and RN.
- **Project Constellation:** Proposed and helped run a model that centralized senior-living sales across buildings — piloted in Minneapolis, rolled out nationally six months later.

SKILLS & COMPETENCIES

Sales & Leadership: B2B Sales, Pipeline Management, Sales Forecasting, CRM, Team Building (8 to 30+), Recruiting & Retention, Compensation Design, Performance Management, Culture Building, Cross-Functional Leadership, Stakeholder Communication

Operations & Strategy: P&L Management, Revenue Scaling, Business Unit Launches, Process Design, Change Management, Strategic Planning, Org Design, Vendor Management, Workflow Automation

Finance & Analytics: Yearly Budgeting, Quarterly KPI Reviews, Multi-Division P&L, Chart of Accounts Design, Financial Reporting, Margin Management, Business Analytics, QuickBooks Online

Technology & Tools: React, TypeScript, Supabase, PWA Development, ElevenLabs Speech-to-Text, Microsoft 365, Salesforce, DynaScape Manage360, TeamEngine, ERP Systems, AI Tool Selection (Claude, Gemini, Microsoft 365 Copilot)

EDUCATION

DePaul University — Chicago, IL

2008 – 2011

Economics and Philosophy coursework

Illinois Institute of Technology — AFROTC Detachment 195

2008 – 2011

Aerospace Studies & Military Science (Minor) — ROTC Leadership Laboratories

Combat Rescue Officer Training — USAF Special Operations Command

BEYOND WORK

Community: 9 years active in the recovery community. Volunteer with WAMBA, VMBA, and Special Olympics of NH.

Competitive: Hockey, triathlons, mountain biking, snowboarding, surfing, hiking, backpacking.

Interests: Fascinated by how businesses are built — I read business history and founder stories the way other people watch sports. Passionate about emerging technologies and investing. Exploring and remote camping — new experiences are my favorite way to connect with people.

Online Resume: jamesmccormick.work