



Cornerstone Executive Search has been exclusively retained by Forrest T. Jones to conduct their search for a new Assistant Regional Manager.



ASSISTANT REGIONAL MANAGER

Forrest T. Jones

Fast Facts

- **Location:** Dallas-Fort Worth metro
- **Reports to:** Regional Manager
- **Role Type:** Succession planning role for future Regional Manager
- **Industry:** Insurance and insurance-related services
- **Associates:** 350+
- **Founded:** 70+ years serving clients
- **Kansas City-based, family-owned** national provider of insurance and financial solutions
- **Mission:** Specialty insurance solutions with personalized expertise and responsiveness.

The Organization

Forrest T. Jones & Company, Inc., and its affiliates ("FTJ"), provide insurance and insurance-related services to clients, corporations, employers, members of associations, and individuals. These services include benefits through innovative life and health insurance plans, financial services, and customized insurance products for niche markets.

FTJ operates with a specialty insurance model grounded in personalized expertise, responsiveness, and relationship-driven service. The organization's work requires leaders who can balance growth, service quality, compliance, and operational consistency while building trusted relationships with clients, carrier partners, and internal teams.

FTJ's values emphasize integrity, entrepreneurial spirit, results-driven performance, commitment to promises and people, and stewardship of the people and resources entrusted to the organization.

The Opportunity

This is a meaningful succession planning opportunity for a leader who wants to grow into broader regional management responsibility. The Assistant Regional Manager will gain progressive exposure to regional leadership, strategic planning, business development, performance management, team coaching, and client relationship leadership.

The role offers the opportunity to help strengthen regional consistency, expand market presence, improve service delivery, and support long-term business success while working closely with an experienced Regional Manager.

The Position

Based in the Dallas-Fort Worth metro area, the Assistant Regional Manager will support the overall performance, service delivery, and day-to-day operations of the region while developing the leadership capabilities necessary to assume a future Regional Manager role.

This position partners closely with the Regional Manager to strengthen client relationships, support team development, drive operational consistency, and contribute to business growth. The role is designed as a succession planning opportunity, providing progressive exposure to leadership responsibilities, strategic decision-making, and regional oversight.

The Assistant Regional Manager will support regional operations, service standards, business development and sales goals, client and carrier relationships, performance reporting, compliance, and team execution across professional liability and related cyber and business insurance products and programs.

The Ideal Candidate

The ideal candidate is a relationship-driven insurance and business development professional with demonstrated leadership potential, strong judgment, and the ability to influence, coach, and develop others.

A successful candidate will bring business-to-business sales experience, a customer-focused approach, strong communication skills, and the ability to balance operational priorities, service expectations, and growth objectives. Professional liability sales experience, property and casualty licensure, and insurance industry designations are strong pluses.

Just as important, the successful candidate will model integrity, professionalism, accountability, and stewardship while preparing for broader regional leadership responsibility. This leader should be comfortable working independently, collaborating across teams, handling sensitive business matters, and supporting change in a practical, positive way.

Key Responsibilities

- **Regional operations leadership:** Partner with the Regional Manager to support regional operations, service standards, business development and sales goals, and overall team performance.
- **Workflow and execution:** Assist in overseeing daily workflow, resolving operational issues, and promoting consistent execution of regional processes and procedures.
- **Team coaching and development:** Support the Regional Manager in coaching, developing, and motivating team members to achieve performance, service, and business growth objectives.
- **Client and carrier relationships:** Build and maintain strong relationships with clients, carrier partners, and internal stakeholders to support retention, responsiveness, and long-term business success.
- **Business development:** Participate in business development efforts by identifying and pursuing growth opportunities, supporting sales and service initiatives, and helping expand regional market presence.
- **Performance analysis:** Analyze regional performance metrics, prepare reports, and provide recommendations to improve productivity, service quality, and operational effectiveness.
- **Delegated leadership:** Assume delegated leadership responsibilities in the absence of the Regional Manager and demonstrate sound judgment in decision-making and issue escalation.
- **Workforce planning and succession readiness:** Collaborate with the Regional Manager on workforce planning, mutually agreed KPIs and sales targets, talent development, and succession readiness for key regional roles.
- **Compliance and controls:** Model and reinforce compliance with company policies, regulatory requirements, and internal controls across all regional activities.
- **Leadership development:** Gain progressive exposure to budgeting, strategic planning, and regional leadership responsibilities in preparation for advancement to Regional Manager.
- **Cross-functional representation:** Represent the region in meetings, initiatives, and cross-functional projects, communicating professionally and effectively with leadership and business partners.
- **Other duties:** Perform other related duties as assigned in support of regional leadership and business objectives.

Qualifications

- Bachelor's degree in insurance, marketing, business, communications, or equivalent experience.
- 5+ years of business-to-business sales experience.
- Professional liability sales experience is a plus.
- Property and casualty licensure, existing insurance licensure, and/or insurance industry designations preferred.
- Demonstrated leadership potential with the ability to influence, coach, and develop others.
- Strong interpersonal and relationship-building skills with a customer-focused approach.
- Exceptional verbal and written communication skills, including the ability to present information clearly and professionally to varied audiences.
- Business acumen with the ability to balance operational priorities, service expectations, and growth objectives.
- Analytical and problem-solving skills with the ability to interpret performance data and identify practical solutions.
- Adaptability and resilience in a changing business environment, with the ability to manage multiple priorities effectively.
- Initiative, accountability, and sound judgment in handling confidential and sensitive business matters.
- Ability to travel as business opportunities and client needs require.

Key Success Metrics

- Achievement of mutually agreed regional KPIs, sales targets, and business development goals.
- Client retention, responsiveness, and relationship strength.
- Growth in regional market presence and quality of new business opportunities.
- Consistency of service delivery, workflow execution, and operational follow-through.
- Improved productivity, service quality, and practical use of performance reporting.
- Team development, engagement, and readiness for future regional leadership needs.
- Compliance with company policies, regulatory requirements, and internal controls.
- Progressive readiness to assume future Regional Manager responsibilities.

Additional Expectations

- Be based in the Dallas-Fort Worth metro area and remain visible and accessible to regional team members, clients, carrier partners, and business partners.
- Travel as business opportunities and client needs require.
- Lead with integrity, professionalism, discretion, and ethical conduct at all times.
- **Model FTJ's core values:** integrity, entrepreneurial spirit, results-driven performance, commitment to promises and people, and stewardship of entrusted people and resources.
- Work is generally performed in an office environment. The incumbent must have the ability to stand and sit frequently throughout an eight-hour period and reach vertically for overhead use as well as horizontally. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

About Dallas-Fort Worth, Texas

The Dallas-Fort Worth metro area offers a strong base for insurance, sales, and business development leaders. The region combines a large and diverse business community with accessible travel, broad client reach, professional sports, arts and culture, restaurants, neighborhoods, and quality-of-life amenities.

For a leader serving regional clients and carrier partners, Dallas-Fort Worth provides a practical and connected home base for relationship building, market development, and long-term career growth.

Learn more about the area: [Visit Dallas](#) | [Visit Fort Worth](#) | [Dallas Regional Chamber](#)

About Cornerstone Executive Search

Cornerstone Executive Search is a leading retained executive search firm that helps great companies recruit great people. For more than 40 years, our firm has excelled in serving our client companies with executive talent acquisition, leadership development and career transition services in Kansas City and across the Central Midwest region of the United States. Our firm has successfully completed more than 1,600 retained executive search assignments for C-suite, President, Vice President, Director and Management-level positions. To inquire about how Cornerstone Executive Search can serve your executive talent acquisition needs, please [click here](#) to visit our website.

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