

Casey Nelson



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DIRECTOR OF CONSULTING SERVICES

My Kolbe is **8-7-3-3**.

I have a natural drive to strategize and plan, a knack for gathering and analyzing information, and a balanced approach to implementation and follow-through.

My "why" is to contribute by providing clear guidance, and a steady, methodical approach to achieving your agency's goals.

GET IN TOUCH WITH CASEY



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MAXIMIZE YOUR AGENCY

Casey is a passionate educator turned insurance expert with over 9 years of experience in the industry. Casey spent 6 years running a successful agency before he founded an insurance technology consulting company to address the growing need for technology-driven solutions. Casey's true passion lies in empowering agencies to fully leverage their technology, helping them streamline processes and achieve greater efficiency.



Specialties

- CRM setup & implementation
- Automated workflows
- Integration development & management
- On-site training



Experience

- Director of Consulting - Catalyit
- Founder & CEO - StakWise
- COO - Integrity Personal Insurance
- Board of Directors - IIAT
- ELITexas Chair - IIAT