

# David Junaid

Insurance Technology Implementation | P&C Operations | Technical Program Delivery

Hamilton, ON · (905) 515-7128 · david@davidjunaid.com · linkedin.com/in/davidjunaid

P&C insurance and implementation professional who turns operational needs into practical workflows, portal tools, documentation, training, and production support. Experienced in requirements gathering, workflow design, system implementation, API integration, SQL, CRM/portal development, AI-assisted intake, testing, and troubleshooting across brokerage and small-business delivery. Brings practical knowledge of insurance workflows, underwriting submissions, stakeholder communication, and end-to-end implementation from discovery through continuous improvement.

## EXPERIENCE

|                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>2024 – PRESENT</b><br>London, ON | <b>Commercial Broker &amp; Underwriting Liaison</b><br>The 1057 Group Inc., London, ON<br><i>Brokerage operations, commercial underwriting submissions, quote-to-bind process ownership, RIBO compliance, broker enablement, and digital lead-management systems.</i> <ul style="list-style-type: none"><li>Built a centralized brokerage portal for daily operations, consolidating documents, note templates, contacts, training content, underwriting rules, calendars, and lead management; gave brokers one place to access partner links and operational resources.</li><li>Gathered requirements across broker, underwriting, and service workflows to design structured intake and pre-submission processes.</li><li>Standardized the end-to-end quote-to-bind-to-submission process across information collection, data entry, quote delivery, binding, and insurer submission; created checklists and portal support tools and trained new staff, replacing an inconsistent process that led to errors, incomplete files, audit concerns, and client dissatisfaction.</li><li>Developed AI-assisted intake logic to standardize questions, flag missing information, and improve consistency before submission.</li><li>Created and led a broker training and onboarding system, personally training eight brokers on brokerage platforms and operating processes; produced self-paced training videos to support onboarding.</li><li>Formalized office processes and ensured RIBO-compliant brokerage activities through standardized processes and documentation that reduced E&amp;O exposure.</li><li>Led the brokerage's commercial department, reviewing property and auto/garage submissions for expertise and submission processing.</li></ul> |
| <b>2019 – PRESENT</b><br>London, ON | <b>Founder</b><br>Advardo<br><i>Founded a startup delivering web systems, digital workflows, and insurance-technology implementation support for small businesses and insurance brokerages.</i> <ul style="list-style-type: none"><li>Delivered digital and operational projects for small-business clients, including scope definition, requirements gathering, timelines, and implementation support.</li><li>Partnered with Pathway Port to build brokerage websites, integrate its Insurance BMS-to-web solution, and support brokerages connecting their BMS to Pathway Port.</li><li>Founded a startup delivering web systems and implementing existing solutions for small-business and insurance-sector clients.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>2019 – 2024</b><br>London, ON    | <b>Account Manager, Marketing</b><br>Richard Ten Haaf Insurance   Desjardins<br><i>Insurance operations, motorcycle-market lead generation, custom PHP broker workflow systems, and policy sales</i> <ul style="list-style-type: none"><li>Built a motorcycle-insurance digital lead-acquisition funnel that generated over 1,500 qualified leads in its first year, including a PHP broker-side lead-tracking and management backend for every incoming lead.</li><li>Worked with the sales team to quote, bind, and sell new insurance policies while supporting client service, renewals, underwriting communication, and policy-change workflows in a high-volume insurance office.</li><li>Partnered with a leading motorcycle training institute to provide insurance information materials and secure links from its website to the motorcycle-insurance lead site.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

## EDUCATION & CERTIFICATIONS

|                                                                                                                                                                                                                                          |                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| <b>Western University · 2022</b><br>Bachelor of Management & Organizational Studies, Finance<br>1st Place, GCG Consulting Case Competition · 2022 <ul style="list-style-type: none"><li>Western Propel Entrepreneurship Member</li></ul> | <b>Certifications</b><br>RIBO License (2024) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|

## SELECTED BUSINESS & SYSTEMS PROJECTS

- Brokerage Operations & Workflow Platform:** — Built and deployed a centralized internal platform supporting lead intake, underwriting workflows, documentation, referrals, follow-up, and operational tracking, becoming a core tool used in day-to-day brokerage operations.
- Commercial Intake & Decision Automation** — Designed structured, rules-based intake and eligibility workflows that identified missing or inconsistent information before submission, translating underwriting requirements into repeatable business logic and reducing avoidable rework.
- Digital Acquisition & Client Journey Platform** — Built an end-to-end digital acquisition, intake and follow-up system that generated 1,500 qualified insurance leads in its first year, combining conversion-focused journey design with automated lead capture and brokerage workflows.