

JAMES L. LOFTIS

BUSINESS DEVELOPMENT | CUSTOMER SUCCESS | PARTNERSHIPS | M&A

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PROFESSIONAL SUMMARY

Relationship-driven business development and customer success leader with 12+ years across M&A advisory, SaaS, enterprise sales, and founder-led product development. Supported transactions up to \$300M+, consistently exceeded \$1M in personal monthly sales, doubled a national account pipeline, and built client-success systems adopted across multiple locations. Known for earning trust, making complex decisions clearer, and turning ideas into repeatable action.

CORE STRENGTHS

Business Development & Pipeline Growth | Customer Success & Account Management | Partnerships | M&A and Deal Origination | Consultative B2B Sales | Executive Relationship Management | Client Training & Enablement | Website and Product Strategy

PROFESSIONAL EXPERIENCE

Founder & Business Builder AgoraTide and OwnerGauge

2026 - Present

- Develop business concepts from market research and positioning through website launch, content, conversion strategy, and iteration.
- Built AgoraTide to help small businesses and founders clarify their offer and create credible websites designed to generate opportunity.
- Built OwnerGauge, an owner-facing platform that helps business owners explore estimated value, transaction readiness, and buyer risk.
- Direct a portfolio of digital projects spanning local lead generation, decision tools, content, SEO, and customer-friendly web experiences.

Vice President, Business Development & M&A Blue River Financial Group

2021 - 2023

- Supported four lower-middle-market M&A transactions ranging from \$7M to \$300M+ in enterprise value.
- Worked with founder-owners, corporate acquirers, and private equity groups through sourcing, relationship development, diligence, and closing coordination.
- Built targeted outreach campaigns to create proprietary deal flow across manufacturing, business services, franchising, automotive services, and home services.
- Earned the Certified Merger & Acquisition Advisor (CM&AA;) designation.

Client Success Consultant Zurich Insurance

2019 - 2021

- Trained and supported 30+ dealerships nationwide in launching Zurich's Service Lane Sales product.
- Created a structured SMART-goal system that helped one dealership generate more than \$1M in gross sales within six months.
- Developed a repeatable five-step success plan used across multiple client locations.

Southeast Customer Success Manager Text2Drive

2017 - 2019

- Doubled the dealership pipeline from 70 to 140+ accounts in under a year through targeted outreach, referrals, and consistent relationship management.
- Trained dealership teams on SaaS integration, customer messaging workflows, and service-recall automation.
- Helped clients improve communication, adoption, profitability, and the customer experience.

Owner Advisor

2016 - 2017

Tesla

- Managed the full sales cycle for Tesla's EV lineup and consistently exceeded \$1M in personal monthly sales.
- Guided buyers through technology, financing, and charging decisions with a patient, education-first approach.

Customer Development

2014 - 2016

GoDaddy

- Ranked among GoDaddy's top national front-line B2B sales performers.
- Promoted into the company's highest-grossing sales division and sold websites, domains, and digital marketing solutions to small and midsize businesses.

Earlier Business Development and Sales Roles

2011 - 2014

Shred-It | Carnival Cruise Line

- Built a recurring information-security sales pipeline across a 300-mile territory at Shred-It and earned a CISP designation.
- Consistently ranked in the top 25% of Carnival Cruise Line's internal sales division after completing its formal eight-week training program.

EDUCATION & CREDENTIALS

B.S. Marketing
Palm Beach Atlantic University

Certified Merger & Acquisition Advisor (CM&AA)
Alliance of M&A Advisors

CURRENTLY BASED IN ENCINITAS, CALIFORNIA | OPEN TO THE RIGHT FULL-TIME OPPORTUNITY