

Direct Hire: 4828 ** 2-3 LIFE/HEALTH APPS/MONTH **

Licensed Senior Account Manager

EXPERIENCE

State Farm

December 2014 - Present

Licensed Senior Account Manager

- Managed 32 daily customer service calls, consistently earning three five-star reviews per week by addressing account queries, updating policies, scheduling appointments, and processing payments.
- Generated sales and secured new business by actively contacting leads, preparing policy documents, and delivering 40 quotes per month with an 80% closing ratio.
- Conducted 15 in-person and virtual insurance presentations per month, analyzing customer needs and providing the best options while upselling products and services.

Communications Retail

February 2007 - December 2014

Store Manager

- Administered daily operations, including inventory audits, cash management, and regulatory compliance, to enhance efficiency and adherence to policies.
- Resolved customer inquiries and complaints using effective communication strategies, building strong relationships and trust within the community.
- Led and motivated staff by implementing development programs and visionary leadership, significantly improving team performance and goal achievement.
- Trained employees in security and customer service best practices, ensuring a safe and customer-focused environment.

SKILLS

- Professional Skills: Customer Service, Sales, Business Development, Customer Demand Planning, Upselling Skills, Presentations, Calendar Management, User Assistance, Auditing Skills, Cash Management, Casualty Insurance, Insurance Management and Aftercare, Regulatory Compliance, Safety Principles, Strategic Communication, Stock Control, Cross Selling, Customer Relationship Management, Negotiation Skills, Cash Register Operation, Data Entry Skills, Wireless Communications, Financial Analysis, Team Management, Policy Analysis, Agriculture IT Skills: Electronic Customer Relationship Management (ECRM), Microsoft PowerPoint, Microsoft Office, Microsoft Outlook, Microsoft Word, Microsoft Excel

CERTIFICATIONS

P&C and Life & Health Licensed

State of California

ROLES, ACTIVITIES & REQUESTED COMPENSATION

Reports 30-40 items/\$15-25k premium/month

Will work REMOTE in PST, MST, CST time zones or in-office near Santa Clarita, CA

Desires a Sales or Hybrid role with a State Farm Agency @ \$45k+ base, with the ability to earn \$60k+ total

15+ outbound calls/day, 30+ inbound calls, pivot and cross selling, creating lead lists, referral selling, and customer service & reports selling 2-3 life policies and 2-3 health policies/month