

Candidate 4412

Insurance Agent

TX

Licensed insurance agent in TX & IL. CE completion in project management.

Authorized to work in the US for any employer

Work Experience

Licensed Sales Producer

Allstate Insurance - IL

April 2023 to Present

Hit daily metrics that consist of a minimum of 100 dials, 12 quotes, and two policy sold per day. Utilize lead manager, efficiently, completing task and setting appointments.

Sustain 90% PBR bundle rate. Updating KPI reports daily to be aware of current standing and run rates.

Multimodal Executive

Transportation - TX

March 2022 to April 2023

Responsible for driving and full truckload sales, account management, marketing and operations to continue rapid growth and expansion. Cultivate account growth through research and prospecting. Identify all issues in team and provide continuous support to all members according to operating standards on everyday basis. Utilize reports, analyze information, and monitor trends to identify opportunities in the territory. Ensure adherence to the company policies, SOP's and Tariff compliance, along with best practices and efficiencies.

Sales Manager

Allstate Insurance - TX

January 2019 to March 2022

Develop KPI's, leader boards, and sales trackers. Create customized workflow's for CRM's. Engage in daily coaching with sales associates. Pulling phone calls, going through coaching daily to make a stronger team. Monitor underwriting reports, and making sure our team maintains compliance.

Sales Producer

Allstate Insurance - TX

December 2016 to August 2018

Help grow the agency by engaging new prospects and building strong relationships. Providing insurance and financial products that help customers protect their homes, cars, and retirement incomes, and live a good life. Apply insurance knowledge and sales skills to increase the customer's understanding of the value of insurance and cultivate long-term relationships as a trusted advisor.

Acquisition Specialist

State Farm - TX

October 2015 to December 2016

Develop leads, schedule appointments, identify customer needs, and market appropriate products and services.

Provide prompt, accurate, and friendly customer service. Service can include responding to inquiries regarding insurance availability, eligibility, coverages, policy changes, transfers, claim submissions, and billing clarification.

Center Manager

Cash Express - TX

March 2012 to October 2015

Responsibilities

Overseeing operation of the center. Ensuring maximized sales and profitability; meeting monthly and yearly goals. Completing daily cross audits on active loans. Processing deferred checks, and receiving large amounts of cash delivery. Reviewing checks, controlling forgeries. Making marketing calls to lapsed customers to grow our business.

Education

High school diploma

High School - TX

Skills

- CRM Software
- Cold Calling
- Sales Management
- Underwriting
- Salesforce
- Credit Analysis
- 3PL
- Financial services
- Customer service

Certifications and Licenses

Property and Casualty License

October 2015 to Present

Life and Health Insurance

October 2016 to Present

Certified Associate in Project Management (CAPM)

January 2022

Completing the required hours for certification.

Personal Lines License

Life & Health Insurance License

Insurance Producer License