

Candidate 4146

FL

Insurance industry professional eager to utilize an aptitude for client satisfaction and retention in any insurance role. Dynamic and results-driven agent with substantial experience in the insurance industry. Proven track record of acquiring and maintaining clients by utilizing persuasive sales techniques.

Knowledgeable and organized with success in creating and managing client relationships, identifying and assessing customer needs and developing customized insurance plans.

Work Experience

Licensed Insurance Producer

STATE FARM - FL May 2015 to Present

- Sells multiple policies across multiple platforms: Auto, Home, Condo, Renters, Commercial lines, Life, Hospital, Income & Disability
- Consistently exceeds sales goals
- Sells 1/4M in policies year-over-year
- Maintains strong relationships with customers by providing excellent service and support.
- Prepares accurate summaries of policy information for use by underwriting departments.
- Develops and implements comprehensive insurance plans for clients according to individual needs
- Performs regular audits of existing policies to ensure compliance with regulatory guidelines.
- Manages the sales process from lead generation to policy delivery.
- Assists customers in completing complex paperwork associated with their policies or claims processes.
- Manages client accounts on a daily basis, including billing, policy maintenance, and claims processing.
- Utilizes problem-solving abilities to resolve customer inquiries quickly and accurately.
- Drafts comprehensive proposals outlining coverage options for prospective clients.
- Prepared quotes and proposals based on clients' requirements and needs.
- Utilizes effective communication skills to build trust with potential clients and close deals.
- Cultivates strong relationships with current customers by providing excellent customer service.
- Assesses customer risk levels and recommends appropriate coverage options
- Analyzes data from various sources to determine risk assessments for potential clients.
- Provides leadership and training for agents who are onboarding
- Assisted customers in completing complex paperwork associated with their policies or claims processes.
- Leads team meetings.
- Drafts comprehensive proposals outlining coverage options for prospective clients.
- Generates new sales, retained existing members and grew book of business through multiple product offerings.
- Delivers client-focused solutions to create long-lasting relationships.

Customer Preservation Specialist

PROGRESSIVE - FL

December 2012 to May 2015

- Developed and implemented specialized procedures for customer service operations.
- Provided technical support for customers experiencing complex issues with their policies
- Conducted policy reviews and customers to identify potential gaps in coverage for additional coverage options.
- Problem solved for clients experiencing billing discrepancies or overall coverage questions.

Education

Some college in Psychology

University

Skills

- Risk Management
- Licensing Requirements
- Policy Management Expertise
- Account Management
- Client Relationship
- Team Training Management
- Salesforce
- Microsoft Outlook
- Underwriting

Certifications and Licenses

Insurance Producer License