

Direct Hire Candidate: 4933

Licensed Office Manager - Customer Service Representative

EXPERIENCE

State Farm

February 2022 - Present

Licensed Office Manager - Customer Service Representative

- Developed and maintained strong customer relationships by addressing inquiries regarding eligibility, coverage, claims, transfers, changes, and billing.
- Managed office deposits, processed roadside service claims, and ensured timely payments.
- Handled claims and payment processing, providing follow-up assistance to customers as needed.
- Supported the sales team by preparing and providing necessary documentation for underwriters.
- Maintained accurate customer account records to ensure seamless service and up-to-date information.
- Scheduled appointments, identified customer needs, and provided personalized insurance solutions.

Mortgage Company

September 2021 - August 2022

Junior Processor

- Compared new files to contracts and sent out Initial Disclosures to ensure all documentation was accurate and timely.
- Placed all necessary orders, including appraisal, title work, verification of employment, and other required documents.
- Followed up on orders to ensure completion and maintained timely progress on all file-related tasks.
- Collaborated with processors to manage all aspects of the file and ensure smooth progression for underwriting.

Transportation Services

October 2013 - February 2018

Accounting

- Produced and delivered invoices through various systems, including scan, Cass port, and others, ensuring timely and accurate processing.
- Managed payroll for employees and contractors, ensuring all payments were processed accurately and on time.
- Maintained up-to-date employee files, ensuring all necessary documentation and records were accurate and organized.
- Coordinated and maintained new customer accounts, ensuring all required information was collected and processed efficiently.
- Provided office assistance to both owners, supporting with various administrative tasks as needed.

CERTIFICATIONS

P&C, Life & Health Licensed in the State of TX

ROLES, ACTIVITIES & DESIRED COMPENSATION

Reported: 20-30 items/\$10-20k premium/month

Will work REMOTE in CST

Desires a Service role with a State Farm Agency with the ability to earn \$56k+ total

10+ outbound dials/day, 50+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling & customer service.

SKILLS

- Professional Skills: Financial Underwriting, Customer Demand Planning, Customer Relationship Management, Deposit Accounts, Sales, Billing Processes, Calendar Management, Customer Service, Insurance Claim Processing, Contract of Sale, Sales Reports, Accounts Payable, Payroll Management, Accounts Receivable, Contract Management, Office Equipment, Mortgage Loans IT Skills: Microsoft Office