

Direct Hire Candidate: 4873 ** 1-2 LIFE APPS/MONTH**

Licensed Team Member

EXPERIENCE

State Farm

June 2019 - Present

Licensed Team Member

- Built strong relationships with customers through regular outreach and follow-ups, ensuring high satisfaction and retention rates.
- Explained various insurance options to prospective clients, recommending policies that align with their unique needs and preferences.
- Responded promptly to customer inquiries and issues, adhering to sound sales practices and ensuring resolution.
- Collaborated with internal departments to streamline processes, improving overall efficiency and service delivery.
- Monitored industry trends and regulatory changes to stay informed about evolving product offerings and best practices.
- Customized insurance policies to suit individual client needs, offering tailored solutions to protect their assets and mitigate risks.
- Prepared detailed reports outlining client portfolios, coverage levels, premiums, and policy expiration dates.
- Proactively contacted existing clients to review and adjust coverage based on life changes or shifting needs.
- Delivered exceptional customer service by addressing inquiries and resolving concerns regarding policy coverage or claims processing.
- Presented clear, persuasive information to potential clients, highlighting the benefits of different insurance coverage options.

Insurance Company

March 2019 - June 2019

Life Insurance Agent

- Managed existing client accounts by conducting regular reviews of coverage levels, beneficiary designations, premium schedules, and other relevant details to ensure policies are updated based on changing circumstances.
- Scheduled on-site visits and presentations to engage with both new and established clients, fostering strong relationships and identifying opportunities for policy upgrades.
- Sold life insurance policies tailored to clients' needs and financial situations, ensuring comprehensive coverage to meet their long-term goals.
- Prepared detailed reports for management, outlining sales activities, new account acquisitions, and client retention metrics to track performance and identify growth opportunities.

SKILLS

- Professional Skills: Customer Service, Customer Relationship Management, Customer Demand Planning, Sales, Insurance Management and Aftercare, Presentations, Insurance Claim Processing, Well-being and Personal Care, Industry Developments, Key Performance Indicators, Mentoring, Training Activities, Call Centers, Auditing Skills, Business Process Improvement, Corrective and Preventive Action, Quality Management, Calibration, Social Media, Hairstyling and Hair Care, Generation of Leads, Cash Register Operation, Telemarketing, Casualty Insurance, Consulting, Knowledge of Finance, Telephone Skills, Team Management, Technical Support, Brand Representation, Closing of Sales, Planning of Accounts, Profit-Based Sales Targets, Customer Retention, Negotiation Skills, Scheduling, Corporate Governance, Regulatory Compliance, Risk Analysis, Conflict Resolution, Safety Principles, Machinery, Quality Control, Retention Rate, Procurement Management, Brand Awareness

CERTIFICATIONS

P&C, Life & Health State of PA