

Candidate 3777

TX

Results-driven sales agent accomplished in bringing in new customers and maximizing revenue. Well-versed in different insurance plans and competitor offerings. Persuasive communicator with personable style.

Work Experience

Insurance Customer Service Specialist

Insurance Allstate Agency - Remote , TX
April 2023 to Present

Customized existing insurance programs to suit individual client needs by analyzing specific requirements.

Followed up promptly with interested clients to close sales.

Answered incoming phone calls to articulate product value to prospective customers and support current policyholders.

Responded to customer requests for products, services, and company information.

Reviewed and adjusted customer coverage levels to address, identify, and resolve customer conflicts.

Assessed customer needs and recommended suitable insurance policies.

Documented customer interactions and transactions for accurate, up-to- date records.

Completed customer applications and updated records to reflect current information.

Processed insurance policy cancellations and renewals quickly to meet call time targets.

Posted payments to accounts and maintained records.

Maintained confidentiality of patient finances, records, and health statuses.

Insurance Sales Agent

Statefarm - Texas
December 2020 to April 2023

Recommended type and amount of coverage based on analysis of customers' circumstances using persuasive sales techniques.

Sought out new clients and developed client relationships through networking, direct referrals, lead databases, and cold calling.

Sold auto, home, life, and other various insurance products to individuals and affinity groups within assigned territory using consultative selling techniques.

Customized existing insurance programs to suit individual client needs by analyzing specific requirements.

Developed comprehensive marketing plans to promote insurance products to potential clients.

Registered customer information on database to enable tracking history and maintain accurate records.

Followed up promptly with interested clients to close sales.

Developed sales strategies to increase sales of insurance policies.

Cultivated relationships with clients to identify and meet insurance needs and establish trust and rapport.

Generated quotes and proposals for clients to match individual needs.

Provided comprehensive product knowledge and guidance to help clients on product selection.
Met with prospective clients to discuss insurance needs and provide solutions.
Analyzed customer needs to provide customized insurance solutions.
Created sources for continuous client referrals within community and with businesses using extensive networking skills.
Worked with sales team to collaboratively reach targets, consistently meeting or exceeding personal quotas.
Generated leads through cold-calling, networking and other outreach methods.
Researched and identified potential new markets.
Educated clients on insurance policies and procedures.
Collected premiums on or before effective date of coverage.
Analyzed risk factors to recommend appropriate coverage levels.

Insurance Sales Agent

State Farm - TX

October 2018 to December 2020

Recommended type and amount of coverage based on analysis of customers' circumstances using persuasive sales techniques.
Sold auto, home, life, and other various insurance products to individuals and affinity groups within assigned territory using consultative selling techniques.
Sought out new clients and developed client relationships through networking, direct referrals, lead databases, and cold calling.
Customized existing insurance programs to suit individual client needs by analyzing specific requirements.
Developed strong referral network in community to raise awareness and increase sales opportunities.
Generated quotes and proposals for clients to match individual needs.
Developed sales strategies to increase sales of insurance policies.
Registered customer information on database to enable tracking history and maintain accurate records.
Conducted research and identified market trends to develop better strategies for sales.
Researched and identified potential new markets.
Conducted annual reviews of existing policies to update information.
Met with customers to provide information about available products and policies.
Educated clients on insurance policies and procedures.
Negotiated contracts and terms of sale with potential customers.
Calculated premiums and established payment methods for sales.
Analyzed risk factors to recommend appropriate coverage levels.
Designed presentations and marketing materials to promote insurance products.
Determined financial needs by assessing existing coverage and aligning new products and services with long-term goals.
Generated leads through cold-calling, networking and other outreach methods.
Finalized sales and collected necessary deposits.
Analyzed customer needs to provide customized insurance solutions.
Evaluated competitors' products and services to gain competitive advantage.

Insurance Sales Agent

State Farm - TX

December 2015 to October 2018

Recommended type and amount of coverage based on analysis of customers' circumstances using persuasive sales techniques.

Sought out new clients and developed client relationships through networking, direct referrals, lead databases, and cold calling.

Sold auto, home, life, and other various insurance products to individuals and affinity groups within assigned territory using consultative selling techniques.

Customized existing insurance programs to suit individual client needs by analyzing specific requirements.

Developed sales strategies to increase sales of insurance policies.

Cultivated relationships with clients to identify and meet insurance needs and establish trust and rapport.

Developed strong referral network in community to raise awareness and increase sales opportunities.

Met with prospective clients to discuss insurance needs and provide solutions.

Researched and identified potential new markets.

Met with customers to provide information about available products and policies.

Education

High School - TX, US

Skills

- Account retention
- Risk management
- Exposure determination
- Asset protection
- Quotes and sales
- Auto insurance
- Property insurance
- Client needs analysis
- Life insurance
- Policy renewals
- Self-Motivated
- Spanish
- Native or Bilingual
- Outside Sales
- Upselling

Certifications and Licenses

Insurance Producer License

Property & Casualty License

Life & Health Insurance License