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Objective

I am an experienced sales and insurance agent seeking a new company to call home. Throughout my career, I have built a strong foundation of sales and customer service skills, honing my ability to build relationships and exceed customers' expectations. I am confident that I can bring my knowledge and expertise to your team and help build its success.

Experience

01/2023 - 03/2023 [REDACTED] - Sales Agent

- Meet daily goals to achieve monthly goal for the office
- Tend to customers needs, apply changes to policies, process applications and review policies.

03/2021 - 01/ 2023 [REDACTED] - Retention Department Manager

- Educate clients on policies, regulations and processes.
- Achieved and maintained a healthy client portfolio by client retention rate
- Build relationships with current clients to ensure satisfaction and raise referral rate

08/2017 - 09/2020 Allstate [REDACTED] - Assistant Manager

- Train employees and provide support where needed
- Meet monthly sales goals in fast paced high performing agency
- Ensure customer satisfaction

06/2014 - 08/2017 Allstate [REDACTED] - CSR

- Process applications and upsell or cross sell where applicable
- Complete daily clerical tasks including answering phones, filing, follow ups, promptly responding to emails/voice messages etc.
- Generate leads and ensure client satisfaction

Qualifications

Active CA Property & Casualty License including Life License
Bilingual - Spanish
IdealTraits Personality Test results as of 06/2022: Closer