

Direct Hire Candidate: 4958

Licensed Account Manager

EXPERIENCE

Insurance Company

May 2023 - Present

Licensed Account Manager

- Diligently process all new business assignments for the team, currently managing several groups as the appointed account manager.
- Ensure timely renewal retention within established timelines, consistently meeting Key Performance Indicators (KPIs) for the implementation team.
- Engage with clients and prospects to address inquiries, providing insights to encourage additional lines of coverage based on group needs.
- Create tailored proposals for clients during the decision-making stage of the renewal process, highlighting optimal coverage options.
- Develop unique group materials, including benefit guides, and conduct renewal presentations both in-person and virtually.
- Effectively liaise with insurance carriers on new cases, as well as manage day-to-day customer service and claim-related matters.

State Farm

July 2022 - May 2023

Licensed Account Representative

- Issue quotes, maintain client records, prepare reports, and address client inquiries regarding insurance plans and policies.
- Provided clients with expert guidance in selecting insurance policies that matched their unique needs and preferences.
- Develop segmented email and SMS outreach campaigns to proactively upsell clients on new products.
- Prevent account errors by meticulously tracking customer data in a CRM SaaS platform and creating alerts for discrepancies.
- Meets and exceeds sales goals consistently.
- Resilient spirit and persistent nature
- Strong analytical skills with a goal-oriented mind
- Delivered personalized customer service, engaging with clients to ensure satisfaction and clarity.
- Contribute to achieving an excellent Google rating for the agency by providing fast and effective 5-star treatment to all clients.

Notary Services

January 2022 - July 2022

Account Manager

- Conduct extensive market research to identify, target, and forge partnerships with local businesses.
- Establish strong relationships with other companies, resulting in recurring B2B contracts.
- Proactively analyze customer requests to ensure all forms and meeting details are addressed in advance.
- Utilize software systems to meticulously track invoices, accounting data, and client engagements.

EDUCATION

High School

Diploma

CERTIFICATIONS

P&C Licensed in the State of TX

ROLES, ACTIVITIES AND DESIRED COMPENSATION

Reported: 30-40 items/\$30-40k premium/month

Will work REMOTE in CST & EST or Hybrid near Arlington, TX

Desires a Sales or Hybrid role with a State Farm Agency @ \$40-45k base, with the ability to earn \$60k+ total

100+ outbound dials/day, 30+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling and customer service