

Direct Hire Candidate: 4982 **1 LIFE APP/MONTH**

Licensed Account Manager

EXPERIENCE

Insurance Company

October 2024 - Present

Licensed Account Manager

- Managed accounts payable, ensuring accurate and timely payments while addressing account discrepancies and investigating potential fraudulent transactions.
- Utilized strong problem-solving skills to identify, resolve, and mitigate issues related to account discrepancies and financial discrepancies.
- Applied expertise in conflict de-escalation, maintaining professionalism and composure under pressure when handling customer inquiries or complaints.
- Demonstrated proficiency with technology, simplifying complex concepts for clients and team members to facilitate clearer understanding and efficient decision-making.
- Integrated sales and service strategies to effectively identify customer needs and offer personalized solutions to enhance client satisfaction.
- Adapted quickly and effectively to diverse client needs, providing tailored solutions and support across varying scenarios and challenges.

State Farm

May 2022 - October 2024

Licensed Account Manager

- Handle incoming phone calls and emails, addressing customer inquiries and providing timely responses.
- Onboard new clients while maintaining strong relationships with existing clients, ensuring their needs are consistently met.
- Schedule insurance reviews and financial appointments to ensure clients are properly informed and their coverage remains up to date.
- Identify new business opportunities and cross-sell via telephone, referrals, and various lead sources to maximize growth potential.
- Ensure accuracy and completeness of applications and documents according to carrier specifications, minimizing errors and ensuring compliance.
- Stay updated on industry trends and regulations to provide clients with the most relevant and accurate information.
- Provide exceptional customer service, leading to increased customer satisfaction, loyalty, and retention.

CERTIFICATIONS

P&C Licensed in the States of MN, WI, Life Licensed in the State of MN

ROLES, ACTIVITIES AND DESIRED COMPENSATION

Reported: 30-40 policies/\$25-35k premium/month

Will work REMOTE in any time zone

Desires a Sales or Hybrid role with a State Farm Agency @ \$40-45k base, with the ability to earn \$65k total

40+ outbound dials/day, 30+ inbound calls with live leads, referral sales, pivot and cross selling, bundling, win-backs, customer service & reports averaging 1 life sale per month.