

Direct Hire Candidate: 5135

Licensed Insurance Producer

EXPERIENCE

Allstate / MSA

May 2022 - Present

Licensed Insurance Producer

- Researched and sourced potential clients through networking and marketing strategies, building long-term relationships and ensuring their insurance needs were met.
- Advised clients on insurance policies, offering tailored solutions that best suited their personal or business needs, and provided clear explanations of policy benefits and risks.
- Delivered approved insurance policies to new clients, ensuring they fully understood their coverage and the process.
- Reassessed and updated existing clients' policies after life-changing events (e.g., marriage, home purchase, childbirth) to ensure their coverage remained relevant and adequate.
- Utilized a customer-focused approach to upsell and cross-sell additional products, helping clients maximize their coverage and insurance portfolio.
- Filled out and submitted client applications for various insurance products, ensuring accuracy and completeness.
- Issued accurate quotes for potential clients, providing them with clear explanations of premium rates and coverage options.
- Maintained comprehensive and up-to-date client records in CRM systems, ensuring all interactions, policy changes, and claims were documented properly.
- Prepared and submitted detailed reports to management, tracking progress, sales goals, and client data to ensure high-quality service and performance.
- Processed and followed up on applications, ensuring clients received their policies promptly and in accordance with the agreed terms.
- Paid close attention to clients' needs and concerns, ensuring they were understood and addressed promptly to enhance customer satisfaction and trust.
- Showed understanding and compassion towards clients, listening to their personal circumstances and providing insurance solutions that best met their unique needs.
- Regularly solicited and provided feedback to clients, fostering an environment of open communication, addressing concerns, and improving service quality for future interactions.

EDUCATION

College

Bachelor's Degree

CERTIFICATIONS

P&C Licensed in the States of NC, SC, VA, WV, GA, MD

SKILLS

Professional Skills: Consulting, Risk Analysis, Writing of Reports, Insurance Management and Aftercare, Customer Demand Planning, Customer Satisfaction, Customer Communications Management, Active Listening Skills, Administrative Operations, Innovation, Budgeting Skills, Marketing, Social Media

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Reported: 40-50 items/month, \$30-40k premium/month

Allstate 2.8 years

P&C Licensed in NC, SC, VA, WV, GA, MD

Will work REMOTE in any time zone

Former Allstate MSA desires a Sales role with an Allstate Agency @ \$42-45k+ base, with the ability to earn \$80k+ total

150+ outbound dials/day, inbound calls with live lead transfers, referral sales, pivot and cross selling, developing their own leads, working remotely, networking, and customer service.