

# Direct Hire Candidate: 5247 \*\*3-4 Life apps/month\*\*

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## Licensed Team Member

*Organized and enthusiastic Account Manager with expertise in providing professional service and proactively identifying and resolving problems. A team player motivated to promote organization and development. Excellent customer service, leadership and conflict management skills.*

## EXPERIENCE

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### Local State Farm Agency

*October 2021 - Present*

#### Customer Service/Sales/Account Manager/Office Manager

- Managed employee performance and sales targets, strategizing processes to consistently exceed monthly goals.
- Conducted one-on-one client consultations, recommending the best insurance products based on lifestyle, needs, and budget.
- Assisted with clerical tasks such as maintaining records, appointment scheduling, invoicing, and screening calls to ensure efficient office operations.
- Streamlined account management processes through automation with Salesforce and SF Connect, reducing response times by 70% and saving 20+ hours of manual work per week.
- Enhanced Google ratings from 3.5 to 5.0 by implementing SEO strategies, offering referral bonuses, and improving customer engagement.
- Managed client onboarding for 50+ high-value accounts, leading to a 37% increase in annual revenue.

### Health Company

*September 2023 - 2024*

#### Administrative Assistant//Client Care Coordinator

- Assisted CEO and team with clerical tasks including record-keeping, billing, invoicing, scheduling, and maintaining office supplies to ensure smooth operations.
- Coordinated CEO and clinical staff schedules through CRM, improving communication and response times by 50%.
- Developed and implemented a new tracking system that reduced response times from 24 to 12 hours, boosting customer satisfaction by 60%.
- Ensured compliance with insurance production regulations and HIPAA laws, reducing errors by 90% and enhancing team collaboration to cut customer complaints by 30%.

### Retail Store

*August 2019 - March 2020*

#### Sales Associate

- Guided 50+ customers daily with checkout, addressing questions and concerns for a smooth experience.
- Increased rewards program and credit card sign-ups by 40% within 4 months through a user-friendly interface and clear communication.
- Collaborated with management to develop a product launch strategy, achieving a 100% adoption rate within the first three months.

## EDUCATION

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### Suffolk County Community College, Selden, New York, US

Associate's degree

## SKILLS

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Microsoft Teams, Word, Outlook, Excel, PowerPoint, Customer Experience/Client Care, Payroll, Accounting, Auditing, Sales, Communication, Efficiency, Time Management, Administration, Interpersonal.

## CERTIFICATIONS

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### Property & Casualty

State of PA & NY

### Life and Health Licensed

State of NY

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Licensed Team Member

Direct Hire Candidate: 5247 \$3,500 \*\*3-4 LIFE APPS/MONTH\*\*

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

State Farm 4.5 years (with one agent)

P&C Licensed in NY & PA, Life & Health Licensed in NY

Will work REMOTE in EST & CST

Desires a Sales or Hybrid role with a State Farm Agency @ \$40-45k base, with the ability to earn \$80k total

50+ outbound dials/day, 30+ inbound calls, pivot and cross selling, referral sales, creating their own leads, bundling, office management, and customer service

Reports averaging 3-4 new life policies/month