

Bilingual Spanish Hire: 5342 **3-5 Life Apps/Month**

Licensed Team Member

EXPERIENCE

Bank

May 2024 - Present

Relationship Banker

- Built and maintained strong client relationships by providing personalized financial solutions, including checking, savings, loans, and investment products.
- Conducted needs-based assessments to recommend appropriate banking services and cross-sell additional products.
- Assisted with account openings, transactions, and problem resolution while ensuring compliance with banking regulations and policies.

Cable/Internet Company

February 2023 - Present

Sales/Customer Service

- Assisted customers with service inquiries, billing issues, and technical troubleshooting for cable and internet products, ensuring a positive experience.
- Promoted and sold upgraded service packages and add-ons by identifying customer needs and recommending appropriate solutions.
- Handled call volumes while maintaining performance metrics in customer satisfaction, issue resolution, and sales conversions.

Local Allstate Agency

January 2022 - February 2023

Licensed Sales Professional

- Prospected and converted leads into new clients by conducting needs-based consultations for auto, home, and renters insurance.
- Regularly exceeded monthly sales goals through strategic outreach, upselling, and cross-selling additional policies.
- Delivered personalized coverage recommendations, building trust and increasing policy bundling rates.
- Followed up on warm leads and previous quotes, maintaining a strong pipeline and consistent close rate.
- Utilized CRM tools to track client interactions, manage renewals, and ensure timely communication throughout the sales process.

Local State Farm Agency

October 2020 - November 2021

Office Manager/ Licensed Agent

- Managed daily office operations while leading sales efforts in Property & Casualty insurance, ensuring smooth workflow and team productivity.
- Sold and serviced auto, home, renters, and umbrella policies by identifying client needs and delivering tailored coverage solutions.
- Trained and supervised team members on sales techniques, compliance standards, and customer service best practices.
- Monitored sales performance, tracked office goals, and implemented strategies to increase policy count, retention, and overall agency growth.

SKILLS

- Professional Skills: Insurance Sales, Sales, Customer Service, Customer Relationship Management, Business Relationship Management, Canvassing, Knowledge of Finance, Knowledge of Employee Benefits, Marketing, Insurance Management and Aftercare, Merchandising, Office Management, Quality Management, Retail Management, Retail Commerce, Sales Management, Social Media, Time Management, Order Processing, Quality Control, Team Management IT Skills: Microsoft Office, Apple Mac Systems, Microsoft PowerPoint

CERTIFICATIONS

Property & Casualty and Life & Health Licensed

State of TX

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Reported: 35-40 items/month, \$30-40k premium/month

Experience: Allstate 2 years, State Farm 1.5 years

Licensed in P&C, Life & Health – TX

Will work REMOTE in CST & EST

Desires a Sales role with an Allstate or State Farm Agency @ \$45k base, with the ability to earn \$85k+ total

30-40 outbound dials/day, 20+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling, and customer service.