

# Direct Hire Candidate: 5341

Licensed Team Member

Reliable and customer-focused Insurance Account Manager with 5 years of experience managing multi-state books of business. Expertise in building lasting client relationships through proactive communication, personalized service, and consultative sales strategies. Skilled in coverage analysis, complex quoting, claims support, and driving client satisfaction and retention.

## EXPERIENCE

### Local State Farm

January 2024 - Present

Customer Service Manager - Remote

- Reviewed newly issued policies for accuracy and compliance with underwriting guidelines.
- Collaborated with producers to gather data for quotes, endorsements, and policy changes.
- Resolved billing disputes and responded to customer coverage inquiries through phone, text, and email communication.
- Identified cross-sell and upsell opportunities to expand client coverage and increase agency revenue.
- Resolved and de-escalated customer concerns, ensuring a positive client experience and strong retention.

### Allstate Insurance Company

September 2023 - December 2023

Marketing & Sales Associate - Remote

- Conducted market research to identify client needs, trends, and target prospects for insurance and financial products.
- Engaged potential clients through cold calling, email outreach, and event marketing to generate interest and schedule consultations.
- Supported business development by implementing lead generation tactics and building strategic partnerships to expand market reach.

### Local State Farm Agency

February 2020 - September 2023

Account Manager

- Supported an active book of business by handling policy maintenance, processing changes, and responding to client inquiries.
- Developed customized insurance proposals to meet unique client needs and coverage requirements.
- Resolved client concerns related to billing, coverage, and service issues, ensuring a positive customer experience.
- Encouraged policy reviews and identified upselling opportunities to enhance client protection and increase retention.

## EDUCATION

### College

Associates Degree

## SKILLS

- Professional Skills: Billing Processes, Customer Service, Cross Selling, Maintenance, Business Development, Business Partnerships, Social Marketing, Customer Demand Planning, Sales, Marketing, Generation of Leads, Market Research, Customer Relationship Management, Conflict Resolution, Prioritization of Requirements
- IT Skills: Microsoft Office

## CERTIFICATIONS

### Property & Casualty and Life & Health Licensed

State of AR, OK, AZ & CA

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Reported: 10-20 policies/month, \$10-20k premium/month

Experience: State Farm 4.5 years, Allstate 3 months

Licensed in P&C, Life – AR, OK, AZ, CA

Will work REMOTE in any time zone

Desires a Hybrid or Customer Service role with a State Farm Agency @ \$40k base, with the ability to earn \$50k total

20 outbound dials/day, 25+ inbound calls/day, referral sales, pivot and cross selling, bundling, policy reviews, and customer service. Candidate is flexible and willing to adapt to the agency's needs