

Direct Hire Candidate: 5399

Licensed Sales Professional

Licensed insurance expert with 6+ years of experience in sales, account management, and client retention. Proven track record of exceeding performance targets, training teams, and managing customer relationships in fully remote environments. Skilled in CRM systems, lead tracking, and virtual client engagement.

EXPERIENCE

Local Allstate Agency

October 2022 - Present

Licensed Sales Professional

- Delivered remote client consultations and tailored insurance solutions to meet individual coverage needs across various product lines
- Maintained high levels of client satisfaction by providing responsive and reliable virtual support throughout the policy lifecycle
- Utilized CRM systems to track leads, generate quotes, process applications, and manage ongoing policy servicing remotely
- Consistently exceeded monthly sales targets through effective virtual selling strategies and strong client follow-up routines

Insurance Company

June 2021 - October 2022

Sales Manager

- Managed remote and in-office team operations to drive daily sales goals and ensure smooth workflow across multiple platforms
- Led virtual training and onboarding sessions for new agents, equipping them with product knowledge, compliance standards, and remote communication skills
- Enhanced team performance through one-on-one coaching on CRM tools, lead management, and remote selling techniques
- Boosted overall agency revenue by identifying virtual upselling and cross-selling opportunities, improving client retention and policy bundling rates

Local Allstate Agency

December 2019 - June 2021

Licensed Sales Professional

- Managed a personal book of business and conducted virtual policy reviews to identify coverage gaps and upsell opportunities
- Recognized as a top performer in monthly sales and policy retention, consistently exceeding performance benchmarks
- Maintained accurate and detailed client records using Allstate's CRM system to support ongoing client service and compliance

Insurance Agency

April 2018 - December 2019

Insurance Sales Agent

- Prospected and onboarded new clients through targeted outbound marketing efforts, including cold calling and digital outreach
- Quoted personalized coverage options using remote platforms, aligning recommendations with client needs and risk profiles
- Supported policy retention through consistent virtual engagement, follow-up communications, and proactive service initiatives

SKILLS

- Professional Skills: Customer Relationship Management, Insurance Sales, Sales, Customer Communications Management, Upselling Skills, Cross Selling, Outbound Marketing, Customer Account Management, Closing of Sales, Customer Retention, Insurance Management and Aftercare
- IT Skills: Microsoft Word, Microsoft Excel, Microsoft Outlook, Microsoft Office, Microsoft PowerPoint

CERTIFICATIONS

Property & Casualty and Life & Health Licensed

State of AL & TX

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Reported: 40–50 policies/month, \$40–50k premium/month

Experience: Allstate 5.5 years, Independent 2 years

Licensed in P&C, Life & Health – AL, TX

Will work REMOTE only in CST, EST

Desires a Sales role with an Allstate or State Farm Agency @ \$40–45k base, with the ability to earn \$90k+ total

A high producer with Allstate experience is looking for a remote opportunity with an Allstate or State Farm agency. The candidate's roles include: 30+ outbound dials/day, 15+ inbound calls/day with live lead transfers, pivot and cross selling, referral sales, bundling, sales management, and customer service.