

SENIOR ACCOUNT MANAGER

Uniquely qualified and motivated professional with career experience in insurance sales and customer service. Adept in evaluating needs and crafting effective service offerings and roadmaps to meet the needs of valued customers. Known for leveraging tools, practices, and policies to ensure compliance with all applicable regulations, standards, and strategic imperatives.

Trusted client advisor and partner to teams and stakeholders alike. Expertise in organization, cross-functional communications, relationship development, and logistics management. Resourceful and capable of leveraging strong business and service acumen to propel performance objectives in sales, customer support, and service offerings.

Key Skills

Business Operations
Customer Satisfaction
Data Analysis & Reporting
Payment Processing
Compliance & Due Diligence
Communications
Cross-functional Team Leadership

KNOWLEDGEABLE OF THE INSURANCE INDUSTRY, INCLUDING:

Account Management ▪ Customer Engagement ▪ Accounts Receivable/Payable ▪ Customer Data Management ▪ Application Management, Screening & Benefits Verification ▪ Team Training & Development ▪ Scheduling & Administration

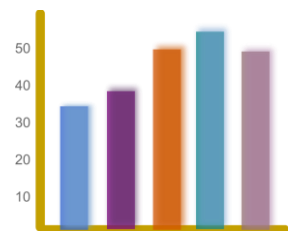
Computer Skills: Microsoft Office (Word, Excel, PowerPoint & Outlook), G-Suite, Zoom

INDUSTRY-RELATED CAREER EXPERIENCE

Account Manager, YOGAZZ, LLC | 2011 – 2020

Managed portfolio of key customer accounts and oversaw financial and compliance administration and daily operations. Acted as liaison between sales team, contractors, vendors, and senior leadership.

- **Generated 10% - 15% consistent sales growth YOY.**
- **Communicated and scheduled approved vendors and contractors.** Solicited and analyzed bids from contractors for repairs and maintenance.
- **Investigated and addressed complaints and violations** in compliance with local, state, and federal regulations.
- **Maintained meticulous records** of expenses and operating costs for all properties in management portfolio.
- **Regularly engaged with management** to discuss and resolve legal issues or disputes.
- **Advocated for diverse and equitable operations.** Worked with all stakeholders to ensure renting practices were not discriminatory and that properties complied with state and federal regulations.



Account Representative, ABCDEF, INC | 2005 – 2011

Sold, assessed, and monitored insurance activity related to designated portfolio of accounts. Customized insurance programs to suit individual customers and to cover a variety of risks.

- **Repeatedly achieved monthly sales quota and goals.**
- **Provided top-tier customer service** by addressing policy questions and/or concerns and processing change requests thoroughly and in a timely manner.

Insurance Sales Agent, TLB INSURANCE | 2000 – 2005

Assisted customers in selecting, purchasing, and managing home and auto insurance policies. Prepared comprehensive rate quotes for agents and customers based on client's needs and consulted on available coverage options and specifications.

- **Ensured accurate and complete client and policy information** and meticulously tracked, recorded, and analyzed account activity.
- **Consistently achieved performance goals** by selling policies to new customers and upgrading existing policies.