Stella Beck

Customer Relations Representative

(630) 555-0184 stella.beck@example.com linkedin.com/example/stellabeck Naperville, IL 60540

STRENGTHS

Calm Issue Resolution
During tense billing calls, reviewed account history first and gave customers clear next steps that restored confidence.

Record Accuracy
Careful notes and contact updates kept agency records usable; teammates relied on documented follow-up during busy days.

Retention Support
Pending cancellations became timely outreach opportunities, helping customers discuss payment options before service concerns grew.

Cross-Team Coordination
Connected producers, carriers, claims, and billing contacts around open requests; customers received steadier status updates.

Bilingual Service
Spanish-language conversations made routine policy service easier to follow, especially when customers needed patience and reassurance.

SKILLS

Customer Service · Problem Solving · Communication · Customer Retention · Policyholder Support · Inquiry Resolution · Record Maintenance · Claims Coordination · Carrier Communication · Conflict De-escalation · Spanish Communication · Agency Operations

SUMMARY

Customer Relations Representative with four years supporting **insurance agency** operations, policyholders, and community members through responsive service and careful issue resolution. Manages high-volume phone, email, and in-person inquiries involving billing, policy documents, address changes, payments, claims coordination, and service requests. Maintains accurate customer records through **agency management systems**, CRM task queues, digital correspondence, and documented follow-up. Builds retention through proactive outreach, payment clarification, renewal support, and timely closure of unresolved concerns. Calm, empathetic communication helps customers move forward during stressful loss, coverage, and billing situations. Bilingual Spanish communication supports routine service conversations with greater clarity and trust. Ready to contribute dependable **customer service**, practical problem-solving, and thoughtful coordination within a full-time agency team focused on exceptional **customer experiences** and community support.

EXPERIENCE

Customer Relations Representative

Lakeside Insurance Partners | July 2024 - Present | Naperville, IL

Supports personal lines customers across phone, email, and in-person channels. Owns inquiry resolution, records accuracy, retention follow-up, and cross-team coordination within a busy insurance agency. Partners with producers, carriers, and claims contacts to deliver clear answers, documented closure, and dependable service.

- Managed phone, email, and **in-person** inquiries using CRM queues, improving response consistency for **policyholders**.
- Resolved **billing** and coverage concerns through account review, earning customer trust during stressful service situations.
- Updated agency management records with contact changes, conversations, and next actions for seamless team continuity.
- Monitored pending cancellations and payment questions, supporting proactive retention outreach before policy relationships weakened.
- Coordinated producers, **carriers**, and **claims** contacts through shared calendars, closing time-sensitive requests with clear documentation.
- Provided Spanish-language assistance for routine communications, helping **community members** follow policy service next steps.

Customer Service Associate

Cedar Ridge Coverage Services | September 2022 - June 2024 | Aurora, IL

Served as first contact for a multi-producer insurance office, guiding policyholders through service questions and routing licensed matters appropriately. Managed records, account research, renewal outreach, and coordination with billing, claims, and underwriting contacts. Built practical confidence handling difficult conversations through agency and carrier training.

- Handled policy inquiries through agency systems, giving customers clear next steps without providing licensed advice.
- Compared carrier notices, payment records, and customer details, resolving account discrepancies with documented findings.
- Entered correspondence and verification notes, improving record completeness for **renewals**, **endorsements**, and service follow-up.
- Coordinated billing, claims, and **underwriting** contacts, keeping policyholders informed during open service requests.
- Supported renewal campaigns through scheduled outreach, needs discovery, and organized **follow-up** on unanswered requests.
- Applied privacy and difficult-conversation training to maintain calm service during high-stress customer interactions.

CRM Workflows

Payment Follow-up

Microsoft Excel

LANGUAGES

English — Native

Spanish — Proficient

MY CAREER

- Customer Relations Representative at Lakeside Insurance Partners (2.2 Years)
- Customer Service Associate at Cedar Ridge Coverage Services (1.8 Years)

PROJECTS

Policyholder Retention Outreach 2025

Created a practical follow-up workflow for pending cancellations, payment questions, and unanswered service requests. Clear notes helped staff focus outreach and gave customers easier paths toward resolution.

Bilingual Service Communication Guide 2024

Organized plain-language Spanish and English phrasing for routine customer communications. Guide supported consistent explanations, respectful conversations, and smoother follow-up across common policy service questions.

LEADERSHIP & AWARDS

- Customer Care Recognition Award, Lakeside Insurance Partners, 2025
- Service Excellence Award, Cedar Ridge Coverage Services, 2023
- Volunteer Tax Assistance Intake Coordinator, Naperville Community Resource Center, 2024 - Present

EDUCATION

Associate of Applied Science in Business Administration

College of DuPage GPA: 3.8 2022 Glen Ellyn, IL

Coursework: *Customer Relations, Business Communication, Office Applications, Business Law*

CERTIFICATIONS

- Insurance Customer Service Fundamentals 2025
- Spanish for Customer Service Certificate 2024
- Microsoft Office Specialist: Excel Associate 2023

TECHNICAL SKILLS

- **Agency Management Systems:** Applied Epic, AMS360, HawkSoft
- **CRM Platforms:** Salesforce, Microsoft Dynamics, HubSpot
- **Office Applications:** Microsoft Excel, Microsoft Outlook, Microsoft Word
- **Customer Communication:** Phone, Email, In-person service
- **Insurance Service Areas:** Personal lines, Policy documents, Endorsements
- **Payment Systems:** Payment portals, Billing records, Payment options
- **Claims Coordination:** Claims contacts, Loss reports, Status updates
- **Record Management:** Contact updates, Account history, Verification notes
- **Retention Workflows:** Renewal outreach, Cancellation monitoring, Needs discovery
- **Service Documentation:** CRM task queues, Shared calendars, Service templates
- **Language Support:** English, Spanish, Bilingual customer communication
- **Customer Care Methods:** Issue resolution, Conflict de-escalation, Follow-up closure

PROFESSIONAL AFFILIATIONS

- Naperville Community Resource Center, Volunteer Tax Assistance Intake Coordinator, 2024 - Present
- College of DuPage, Spanish Conversation Partner, 2021 - 2022

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST