



Phoenix Mcguire

Direct Sales Agent Specialist, Insurance Sales

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STRENGTHS

- 🗨 **Needs Based Selling**
Customer conversations start with careful questions. Coverage discussions then feel useful, clear, and grounded in real needs.
- ♥ **Customer Retention**
Follow up keeps relationships active. Consistent check ins helped customers feel supported after initial conversations.
- 🗨 **Clear Communication**
Coverage details can feel confusing. Plain explanations helped customers make more comfortable choices.
- ☰ **Organized Follow Up**
Accurate interaction records kept next steps visible. A simple routine made outreach easier to manage.
- 👥 **Community Outreach**
Local conversations opened referral opportunities. A friendly, reliable presence made introductions feel natural.

SKILLS

Insurance Sales Customer Service

Prospecting

Sales Pipeline Management

Communication

Product Knowledge

Time Management Needs Analysis

Customer Retention

Phone Prospecting

Referral Development

Community Outreach Follow Up

Underwriting Guidelines

Professional Integrity

SUMMARY

Customer focused **insurance sales** professional with hands on experience supporting client relationships, prospecting activities, needs based product conversations, and organized follow up. Builds trust through clear coverage explanations, responsive service, accurate records, and dependable communication. Current work includes customer needs assessments, insurance product discussions, retention outreach, referral development, local community activities, and compliance aware conversations. Earlier **customer service** experience strengthened problem solving, account support, documentation, and service recovery in a busy environment. Holds a **Property and Casualty Insurance License** and an associate degree in Business Management. Brings a calm, practical approach to sales conversations, consistent attention to **customer needs**, and genuine interest in helping people choose suitable insurance solutions.

EXPERIENCE

Sales Associate, Insurance Sales

Community Insurance Group 📅 August 2025 - Present 📍 Memphis, TN

Supports insurance sales operations through needs based conversations, prospect follow up, customer retention activities, local outreach, referral development, record keeping, and compliance aware product communication.

- Conducted customer **needs assessments** and discussed suitable insurance products clearly.
- Followed up with prospects and existing customers, supporting retention efforts.
- Maintained organized sales records and tracked customer interactions consistently.
- Explained **coverage options** and product information during customer conversations.
- Supported **local outreach** activities and **referral development** with steady follow up.
- Applied **product knowledge** and **compliance practices** during insurance discussions.

Customer Service Representative, Customer Support

Retail Services Center 📅 June 2024 - July 2025 📍 Memphis, TN

Provided high volume customer support through account assistance, service request resolution, accurate documentation, positive communication, promotional support, and consistent use of business procedures.

- Assisted customers with account questions and service requests in person.
- Documented customer interactions and maintained accurate records for follow up.
- Built communication skills through steady, high volume customer support.
- Resolved routine issues while preserving positive customer experiences.
- Supported team **sales** initiatives and promotional activities during customer interactions.
- Applied business procedures and customer relationship practices during daily service.

PROJECTS

Community Insurance Outreach 📅 2026

Supported local outreach and referral development by explaining insurance products, listening to customer needs, and organizing follow up conversations for future sales opportunities.

Customer Follow Up Workflow 📅 2025

Maintained organized prospect and customer interaction records, creating a dependable routine for follow up, retention conversations, and clear service communication.

LEADERSHIP & AWARDS

- Recognized by supervisors for dependable customer service and clear product communication.
- Selected for continued insurance sales responsibility after building trusted customer relationships.

LANGUAGES

English	Native
Spanish	Intermediate

MY CAREER



- Sales Associate, Insurance Sales at Community Insurance Group (1.1 Years)
- Customer Service Representative, Customer Support at Retail Services Center (1.1 Years)

- Praised by teammates for organized records and reliable follow up habits.

EDUCATION

Associate Degree in Business Management

Southwest Tennessee Community College 🎓 GPA: 3.0 📅 2024 📍 Memphis, TN

Coursework: Business communication, customer relations, sales principles, business operations

CERTIFICATIONS

- Property and Casualty Insurance License 📅 2026
- Associate Degree in Business Management 📅 2024

TECHNICAL SKILLS

- **Insurance Products:** Property insurance, Casualty insurance, Coverage options
- **Sales Activities:** Prospecting, Phone prospecting, Referral development
- **Customer Relations:** Customer retention, Needs assessment, Relationship management
- **Communication Methods:** Product explanations, Follow up, Customer conversations
- **Sales Records:** Interaction tracking, Customer records, Sales records
- **Compliance Knowledge:** Compliance practices, Underwriting guidelines, Professional integrity
- **Outreach Channels:** Local outreach, Community relationships, Referral outreach
- **Service Operations:** Account support, Service requests, Issue resolution
- **Sales Management:** Sales pipeline management, Performance expectations, Incentive compensation
- **Business Skills:** Time management, Business procedures, Business communication

PROFESSIONAL AFFILIATIONS

- Community outreach participant supporting local referral relationships and customer education.
- Insurance sales professional committed to ethical service, accurate communication, and customer trust.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST