# Millie Chang

Insurance Sales Agent

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## STRENGTHS

**Relationship Building**
During walk-in conversations, focused questions opened honest coverage discussions and helped customers feel comfortable choosing next steps.

**Consultative Sales**
Quote conversations became clearer after connecting vehicle details, household needs, and coverage choices instead of pushing one option.

**Follow-Up Discipline**
A structured contact plan kept busy prospects visible; scheduled reminders turned scattered inquiries into dependable customer conversations.

**Transaction Accuracy**
Balancing premiums and scanning deposit records made branch handoffs smoother, with supervisors relying on organized documentation.

**Bilingual Service**
Switching naturally between English and Spanish helped customers grasp limits, deductibles, payments, and policy decisions with confidence.

## SKILLS

Personal Lines

Property and Casualty

Customer Service

Sales Production Goals

Relationship Building

Follow-Up

Multi-Tasking

Written Communication

Verbal Communication

Inbound Sales Leads

## SUMMARY


Customer-focused insurance sales professional with more than three years supporting **personal lines** and nonstandard auto customers through inbound leads, **walk-in traffic**, renewals, and policy service requests. Licensed Illinois **Property and Casualty** Producer who explains coverage options clearly, asks focused questions, and recommends products aligned with customer needs. Builds lasting relationships through **timely follow-up**, bilingual English-Spanish service, accurate documentation, and dependable payment processing. Current work includes CRM workflows, agency management systems, currency reconciliation, scanned deposit records, quote preparation, and production-focused pipeline management. Recognized for customer connection, service quality, and peer mentoring. Ready to bring consultative sales discipline, careful transaction handling, and a strong appetite for training and advancement to HarborPoint Auto & Home Insurance.


## EXPERIENCE

### Insurance Sales Agent

Prairie Shield Insurance Group | January 2024 - Present | Elgin, IL

Own inbound and walk-in sales activity for nonstandard auto and personal lines customers. Guide discovery, quoting, coverage selection, payment processing, documentation, and follow-up within CRM and agency management systems. Apply coaching from weekly reviews while supporting **production goals**, renewal relationships, and accurate branch operations.

- Converted inbound and walk-in inquiries into nonstandard auto coverage recommendations through focused discovery conversations.
- Explained liability, physical damage, deductibles, and policy conditions for clear customer decisions.
- Managed more than 100 monthly opportunities through **CRM** records, contact plans, and scheduled **follow-up**.
- Balanced premium transactions and prepared scanned **deposit documentation** for timely bank delivery.
- Reviewed driving history, vehicle details, and household needs before presenting suitable **personal lines** products.
- Applied weekly coaching on objections and close planning, strengthening production performance and customer trust.

### Customer Service and Sales Representative

Lakeside Coverage Center | May 2023 - December 2023 | South Elgin, IL

Supported personal lines customers across quoting, policy questions, documentation, referrals, and renewal communication. Used agency management systems for accurate records and underwriting handoffs while building **bilingual** service skills and completing foundational Property and Casualty licensing coursework.

- Prepared auto quotes and answered policy questions during high-volume **personal lines** service periods.
- Followed web, phone, and referral leads using documented call plans and timely customer **follow-up**.
- Explained limits, deductibles, payment schedules, and policy changes in **English** and **Spanish**.
- Updated customer records and scanned identification and policy documents before underwriting review.
- Built repeat-customer relationships through renewal reminders and clear next-step communication.
- Completed **Property and Casualty** licensing coursework while applying supervisor feedback on compliant documentation.

## PROJECTS

**Bilingual Customer Follow-Up Workflow** | 2025

Walk-In Traffic Coverage Education

Currency Transactions

Agency Management Systems

Bilingual English-Spanish

## LANGUAGES

English Native

Spanish Proficient

## MY CAREER


- Insurance Sales Agent at Prairie Shield Insurance Group (2.7 Years)
- Customer Service and Sales Representative at Lakeside Coverage Center (7 Months)

Created a practical follow-up workflow for English- and Spanish-speaking customers, combining CRM contact plans, renewal reminders, quote status checks, and clear next actions.

### Deposit Documentation Control 2024

Strengthened premium transaction records through balancing routines, receipt checks, scanned documentation, and organized bank-delivery preparation within agency operations.

## LEADERSHIP & AWARDS

- Prairie Shield Customer Connection Recognition, 2025
- Lakeside Coverage Center Service Excellence Recognition, 2023
- Peer Mentor, Prairie Shield New Representative Study Group, 2025 - Present

## EDUCATION

### High School Diploma

Larkin High School GPA: 3.5 2022 Elgin, IL

***Coursework:*** *English, Spanish, Business Communication, Personal Finance*

## CERTIFICATIONS

- Illinois Property and Casualty Producer License 2024
- Insurance Fundamentals Certificate, Insurance Institute of America 2023

## TECHNICAL SKILLS

- **Insurance Products:** Nonstandard Auto Insurance, Personal Lines, Liability Coverage
- **Sales Operations:** Inbound Sales Leads, Walk-In Traffic, Production Goals
- **Customer Management:** Customer Relationships, New Business, Existing Business
- **Policy Servicing:** Policy Quoting, Renewals, Policy Changes
- **Coverage Analysis:** Driving History, Vehicle Details, Coverage Needs
- **Agency Systems:** CRM, Agency Management Systems, Customer Records
- **Financial Processing:** Currency Transactions, Premium Payments, Bank Deposits
- **Document Control:** Scanned Documentation, Receipts, Identification Records
- **Communication Tools:** Microsoft Office, Email, Telephone
- **Training Development:** Property and Casualty Training, Mentorship, Sales Coaching

## PROFESSIONAL AFFILIATIONS

- Volunteer Spanish-English Tax and Benefits Information Assistant, Elgin Community Resource Fair, 2024 - Present
- Peer Mentor, Prairie Shield New Representative Study Group, 2025 - Present

## ADDITIONAL INFORMATION

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

## REFERENCES

AVAILABLE ON REQUEST